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Chair
Councillor Paul Ainslie
Interim Chief Executive Officer
Robin D. Hale

2018-09-18

**REQUEST FOR PROPOSAL
ASSET MANAGEMENT SYSTEM
SOFTWARE IMPLEMENTATION & MAINTENANCE
RFP # 10 (2018-09)**

You are invited to submit a written proposal to provide professional services for building asset management system to manage all Toronto Zoo facility assets. The Toronto Zoo is seeking to implement a web-based system that will provide a capital asset planning and management software application hosted by the proponent.

Proposal: Provide **four (4)** copies of your proposal, **one (1)** unbound signed and clearly marked as ORIGINAL and **three (3)** copies of the original proposal clearly marked as COPY and one (1) electronic copy (Microsoft Word or PDF) on a CD or flash drive in a sealed package or envelope. The original and all copies should be identical (excluding any obvious differences in labeling as noted above). Proposal to be delivered to the office of Purchasing & Supply, Toronto Zoo, Administrative Support Centre, 361A Old Finch Ave., Toronto, Ontario, M1B 5K7 by:

Due Date: **Wednesday, 2018-10-03, by 1200 hours (noon), local time**

Proposals shall remain in effect for a period of ninety (90) days from the Proposal due date.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

If you have any queries regarding this request for proposal, please contact Mr. Peter Vasilopoulos, Supervisor of Purchasing & Supply at 416 392-5916 or pvasilopoulos@torontozoo.ca. If you require further technical details, please contact Leona Mitchell, Director of Facilities & Services at 416 392-5985 or lmitchell@torontozoo.ca.

Yours truly,

Paul K. Whittam,
Manager, Financial Services

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1.0 GENERAL TERMS

1.1 The following definitions will apply to this Request for Proposal and to any subsequent Contract:

- 1.1.1 “**Board**” means the Board of Management of the Toronto Zoo;
- 1.1.2 “**COO**” means the Chief Operating Officer of the Toronto Zoo;
- 1.1.3 “**Consultant**” means the person, partnership or corporation contracting with the Board to provide the required Services;
- 1.1.4 “**Contract**” means acceptance by the Toronto Zoo (by way of written acknowledgement, Agreement, Contract or Purchase Order) to furnish Services for money or other considerations;
- 1.1.5 “**Contract Price**” means the price payable under the contract to the Consultant, being the Proposal Price eventually accepted by the Board of Management of the Toronto Zoo subject to any changes pursuant to the Contract Requirements;
- 1.1.6 “**Commercial Off-The-Shelf (COTS)**” means features that are available as part of the solution immediately on installation and require no configuration or customization;
- 1.1.7 “**Proponent**” means an individual or company that submits or intends to submit, a proposal in response to this Request for Proposal;
- 1.1.8 “**Proposal Price**”, “**Contract**” and “**Contract Documents**” have the meanings set out therefore in clauses contained in these documents;
- 1.1.9 “**Request for Proposal (RFP)**” means the RFP document in its entirety, inclusive of any addenda that may be issued by the Toronto Zoo;
- 1.1.10 “**Services**” or “**Work**” means everything that is necessary to be performed, furnished delivered by the Consultant to meet the Consultant’s obligation under this Contract;

2.0 DESCRIPTION AND SCOPE OF PROJECT

The Toronto Zoo opened in 1974 and is Canada's premier zoo and one of the top 10 zoos in the world. The Zoo is fully accredited by the Canadian Association of Zoos and Aquariums (CAZA) and the Association of Zoos and Aquariums (AZA). The Zoo is a not-for-profit and is stewarded by a Board of Management supported by a professional staff of 277 permanent, approximately 126 non-perm FTE's and more than 400 volunteers. The Zoo is home to over 5,000 animals representing 450 different species, many of which are classified as endangered in the world.

The Zoo's mandate is to build awareness of and involvement in the conservation of animals and their habitats. The Zoo undertakes scientific research for the advancement of wildlife management and for the conservation of irreplaceable genetic resources, both animal and plant. The Toronto Zoo wants to increase awareness for their leadership in wildlife conservation and advocating for wildlife and habitats. We plan to focus on Canadian species and habitats while continuing to be active globally.

Our Mission: Become a living centre for education and science, committed to providing compelling guest experiences and inspiring passion to protect wildlife and habitats.

Our Vision: Canada's national leader in saving wildlife to ensure the rich diversity of nature for future generations.

The Toronto Zoo site occupies 710 acres located in the Rouge Valley on the northeast side of the City of Toronto. There are over 100 buildings/structures on the property. The Zoo is open every day except December 25. Each year the Zoo welcomes on average 1.3 million visitors with approximately 80% of visitors attending between the months of May to October.

PROJECT SCOPE OF WORK

The Toronto Zoo is seeking to implement a web-based solution, including its related installation, configuration, data input/migration, implementation, annual maintenance and training services that will provide a capital asset planning and management software application hosted by the proponent. The software application must be capable of accepting all existing data from the 2015 Toronto Zoo Building Audit, the 2018 Toronto Zoo Site Services Study, and information including engineering studies, hazardous material audits, air or water quality studies etc. in addition to and or in place of facilities assessment information provided by the Building Audit & Site Services Study. The system could also have work order, parts management, and GIS capabilities as listed in section 3.0 below.

- 2.1 Existing data from the 2015 Toronto Zoo Building Audit is to be input into the system by the successful proponent (provide separate lump sum price for data input). The complete building audit is attached to this RFP for reference.
- 2.2 The Toronto Zoo will always own all of the data contained within the software, even after the end of the contract period.
- 2.3 Proponent must provide a dedicated implementation specialist as a single point of contact during implementation.
- 2.4 Consultants will conduct interviews with key Zoo resource staff to gain an understanding of users service requirements and current facility related matters.

- 2.5 Existing site drawings at the Toronto Zoo are for review and site familiarization only. Background information provided by the Zoo is for general reference.
- 2.6 Consultant to attend and take minutes at all meetings, other site, facility and program reviews, and special meetings as required throughout the duration of the project.
- 2.7 Consultant to co-ordinate and liaise with all sub-consultants and others as necessary making sure all relevant issues have been raised and concluded.
- 2.8 Arrangement of special consultants, additional work to the Services, and similar costs to be the responsibility of the Consultant, are to be identified and included as direct disbursements in your Fee Proposal. Special advisors/resource experts recommended by the Consultant and approved by the Zoo will be integrated into the meetings/discussions and paid from disbursements.
- 2.9 Where there is a change to the scope of the project, the Consultant will provide an estimate of the costs of the changed items for approval prior to undertaking the additional work.
- 2.10 Direct assistance and liaison of Consultant with Zoo Facilities & Services staff. The Consultant will liaise with Zoo staff throughout the project regarding audit methodology, site access, and to review the audit reports and recommendations.
- 2.11 Upon award of the contract, the selected Consultant will enter into an agreement for Asset Management Software with the Zoo by purchase order or contract incorporating the terms and conditions of the Request for Proposal and the Proponent proposal, as determined by the Zoo.
- 2.12 It is Toronto Zoo's preference to enter into an agreement with a single software provider that functions as a primary contact in providing a complete range of primary and secondary related services.

3.0 CONSULTANT SERVICES TO BE PROVIDED – RESPONSIBILITIES

Objectives

In general the objectives of the proposed project are as follows:

The Proponent shall provide an Assessment Application for Capital Planning and Management that meets the following requirements. The Application should be a Commercial Off-The-Shelf (COTS) application that is easily configurable through an easy to use web interface.

The requirements have been divided into “primary” and “secondary”. Primary requirements are the minimum necessities and the secondary requirements are desirable, but may not be required at this time. Please indicate which of the secondary requirements are included in your base software package, and which are additional, or add-ons. Any additional costs for secondary items must be shown in the pricing forms. The Zoo requires the ability to disable any secondary functions which are included with the base software package in order to simplify operation for staff during software implementation.

Complete the attached Appendix II for primary requirements and Appendix III for secondary requirements.

4.0 INSURANCE, INDEMNIFICATION AND POLICIES

- 4.1 Professional liability insurance in the amount of \$1,000,000 (per claim) and \$5,000,000 general liability insurance in respect of injury or death to a single person or for property damage in a manner

satisfactory to the General Manager must be maintained through the Project and included in the Fee Proposal.

- 4.2 The Consultant hereby agrees that the Consultant will keep harmless and fully indemnify the Board, the City of Toronto, the Toronto and Region Conservation Authority, their employees, officers and agents against all actions and claims against all loss, liability, judgments, costs, demands or expenses which they or any of them may sustain as a result of the negligent or intentional acts or omissions of the Consultant, its agents, servants, employees or sub consultants or any of them, in the performance of the Services, save and except and only to the extent that any such loss, liability, judgments, costs, demands or expenses are caused by the Board or those for whom at law it is responsible.
- 4.3 All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the Chief Operating Officer.
- 4.4 The Consultant shall, as applicable, conform to and enforce strict compliance with the Occupational Health and Safety Act and for purposes of the Act be designated as the "constructor" for the Service.
- 4.5 The Consultant must adhere to all relevant Zoo policies, including, but not limited to, the Contractor Safety Policy, Working in the Vicinity of Animal Containments Policy and the Vehicles on Site Policy, copies of which the Chief Operating Officer, Toronto Zoo, shall supply to the Consultant.

5.0 PROPONENT SUBMISSION REQUIREMENTS

- 5.1 Title page showing request for Proposal Proponent's name.
- 5.2 Duly executed proposal form.
- 5.3 Indicate the individual or incorporated name of the Proponent (i.e. the prime Consultant); address(es); telephone and fax number(s); and name of key contact person(s).
- 5.4 The Proponent must provide names and company information for all Sub-consultants required by Consultant.
- 5.5 State the scope and limits of responsibility of the Consultant and Sub-consultants named in the team.
- 5.6 Provide a schedule or chart of the proposed tasks, hours and the hourly rates for each person associated with this project.
- 5.7 The Proponent must confirm compliance with the Insurance and Indemnification provisions identified in Section 9.0.
- 5.8 Clearly articulate key personnel to be involved with the project and their responsibilities. Indicate the qualifications and experience (beyond a general resume), that each member will bring to the team and include a breakdown on the number of hours each will devote to the Project and their hourly billing rate. Indicate the total extent of availability of all team members throughout entire Feasibility Study period.
- 5.9 Provide the name, location, client reference and brief description of not more than five (5) similar projects under the direct responsibility of the persons or team named above.

- 5.10 Provide the name, location, client reference and brief description of not more than five (5) similar **projects carried out at Zoological Facilities** under the direct responsibility of the persons or team named above.
- 5.11 Clearly indicate how the project will be managed.
- 5.12 Guarantee project start immediately following successful confirmation of award of the project, and work to implementation and completion schedule.

The Proponent should submit a Submission in a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The Toronto Zoo seeks a package format to support the green expectations and initiatives of the Toronto Zoo.

Please do not use any plastic or vinyl binders or folders. The Toronto Zoo prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your Proposal, they should be fully 100% recycled stock.

The Toronto Zoo seeks and prefers submissions on 100% Post Consumer Fibre (PCF) paper, consistent with the Toronto Zoo's environmental practices. All copies of all pages of the Proposal should be printed in duplex (i.e. on both sides of the pages) where possible.

6.0 **PROPONENT FEE PROPOSAL**

- 6.1 On the Fee Proposal Form (Appendix D), provide an upset fee limit for the Building Asset Management Software inclusive of disbursements, plus HST as follows:
 - **Web-based system provision and initial consulting fees for set up. (fees for primary requirements & secondary requirements to be separate if applicable)**
 - **Software subscription cost, annually (if applicable)**
 - **Additional maintenance or support costs, annually (if applicable)**
 - **Data input cost (lump sum) for the 2015 Toronto Zoo Building Condition Assessment**
 - **Disbursements**

If applicable, the proponent shall list their fees in a modular format with all primary requirements being included in the base fee, and secondary requirements listed as additional modules with associated fees if applicable.

Proponent must disclose any hidden IT costs associated with hardware, hosting, servers, etc.

All Consultant and Sub-consultants costs for research, specifications, models, and similar costs to be the responsibility of the Consultant, identified and included as part of the fees in the Fee Proposal.

- 6.2 Provide hourly rates for other services which may be requested during completion of the project.
- 6.3 An upset limit for disbursements is required, including, but not limited to, reproduction, postage, courier, fax machine, long-distance telephone calls; printing of drawings and specifications, photographic production, approved Consultant travel, as required. Photocopies of receipts must be provided for disbursements.

- 6.4 A 10% holdback will apply to all fees, not including disbursements, to be released after 45 days following completion of work.
- 6.5 Proposal prices shall remain in effect for a period of ninety (90) days from the proposal due date of 2018-10-26.
- 6.6 The Proponent shall bear all costs and expenses with respect to the preparation and submission of its Proposal and the bidder participation in the proposal process (the “Proposal Costs”), including but not limited to: site visits and inspections, all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board, preparation of questions for the Board, and contract discussions and negotiations.
- 6.7 The Zoo shall not be responsible for or liable to pay any Proposal Costs of any bidder regardless of the conduct or outcome of the Proposal Request, Purchase Order, or Contract process.

7.0 PROPOSAL EVALUATION AND SELECTION

- 7.1 The Proponent is urged to ensure that its Proposal is submitted in the most favourable terms in order to reflect the best possible potential, since less than best potential could result in exclusion of the Proposal from further consideration.
- 7.2 The Agreement will not be awarded to the Proposal with the lowest cost, but rather, award shall be based on an evaluation of the Consulting team’s expertise, prior project experience, proposed methodology, and price. Additionally, the Zoo may accept or reject any part of the Proponent’s bid.
- 7.3 An Evaluation Team comprised of representatives designated by the Zoo will evaluate responses to the RFP.
- 7.4 There are three steps to the pre-defined evaluation process:
 - Step 1 – Initial Review of Responses
 - Step 2 – Evaluation of Submitted Proposals
 - Step 3 – Evaluation of Presentations
- 7.5 Step 1 – Initial Review of Responses

The Zoo will open only those Proposals received by the Proposal Deadline and time specified within this RFP. Immediately upon opening, the Zoo will review each Proposal for compliance with the instructions and conditions applicable to this RFP. The Zoo, at its option, may seek Proponent retraction and clarification of any discrepancy/contradiction found during its review of Proposals.
- 7.6 Step 2 – Evaluation of Submitted Proposals
 - 7.6.1 The Evaluation Team will evaluate each submitted Proposal, that has passed through Step 1, on criteria that will include, but not necessarily be limited to, the following:

Evaluation Criteria	Points
Depth and breadth of the Project team’s relevant qualifications and experience with similar scale and type of projects	20
Depth and breadth of the team Lead’s relevant qualifications and experience	15
Commitment to complete work according to schedule of events in section 7.0 within the RFP	10
Availability of team members during entire project	10
Ability to meet all requirements of the RFP	20
Details on the general approach and methodology that proponent would take in performing the services outlined within the RFP	10
Fee Proposal	15

7.6.2 The Zoo may, at its discretion, eliminate a Proposal from further consideration if it deems the overall cost to be prohibitive.

7.6.3 A short-list of suitable Proponents may be established who may be invited to Step 3 to provide presentations related to their Proposal.

7.7 Step 3 – Evaluation of Presentations (If Required)

7.7.1 Invited Proponent(s) shall provide presentations in support of their Proposals or to demonstrate or otherwise expand on the information contained therein.

7.7.2 The Proponent(s) shall ensure that the presentation is made by well versed staff with the authority to make decisions and commitments on behalf of the Proponent.

7.7.3 Any and all costs incurred by the Proponent in order to prepare for and attend the presentation and/or demonstration including transportation, food, lodging, etc. shall be borne entirely by the Proponent.

7.8 The final score is then calculated as illustrated in the following table:

Evaluation	Score
Step 1 – Initial Review of Submitted Proposals	Prerequisite
Step 2 – Evaluation of Submitted Proposals	Maximum 100
Step 3 – Evaluation of Presentations (If Required)	(Maximum 50 If Required)
Total maximum score excluding Presentation	100
Total maximum score including Presentation	150

7.9 By responding to this Proposal, the Proponent agrees to accept the recommendation of the Evaluation Team as final.

7.10 All Proposals shall be submitted by the Proponent on the understanding that the Proposals shall become the property of the Zoo.

8.0 SCHEDULE OF EVENTS

The following is a tentative schedule for the Building Asset Management Software process. The final schedule will be developed jointly with the successful proponent in the first week of project execution:

Pre-Award	
Release of RFP	2018-09-18
Proponents' Question Deadline	2018-09-24
Submission Due	2018-10-03
Interviews, if necessary	Week of 2018-10-08
Notification of Award By the Toronto Zoo	2018-10-15
Post-Award	
Commencement of Work	2018-10-22
Testing	2018-12-10 to 2019-01-31
Implementation and sign off (go live)	2019-02-28

The RFP process and project will be governed according to the above schedule or other schedule provided by the Consultant and approved by the COO of the Toronto Zoo. Although every attempt will be made to meet all dates listed, the Toronto Zoo reserves the right to modify any or all dates at its sole discretion. Appropriate notice of change will be provided, in writing, as soon as is feasible so that each Proponent will be given the same non-preferential treatment.

9.0 PROPOSAL TERMS AND PROVISIONS

The successful Proponent shall be retained through a contractual agreement and/or a purchase order, which includes the terms and conditions of this Request for Proposal.

9.1 Consultant's Liability and Indemnity

The Consultant will from time to time at all times hereafter well and truly save, defend and keep harmless and fully indemnify the Board, the City of Toronto, and the Toronto and Region Conservation Authority and each of their officers, employees and agents (hereinafter called the "Toronto Indemnities") of, from and against all manner of action, suits, claims, executions and demands which may be brought against or made upon the Toronto Indemnities or any of them and of, from and against all loss, costs, charges, damages, liens and expenses which may be sustained, incurred or paid by the Toronto Indemnities, their officers, employees and agents or any of them by reason of or on account of or in consequence of the execution of this agreement or provision of the business or any other work or matter to be carried out or performed by the Proponent with respect to the Request for Proposal or any agreement that may result from the request for proposal process, and/or the non-execution or imperfect or improper execution thereof and will pay to the Toronto Indemnities on demand any loss, costs, damages and expenses which may be sustained, incurred or paid by the Toronto Indemnities or any of them in consequence of any such action, suit, claim, lien, execution or demand and any monies paid or payable by the Toronto Indemnities or any of them in settlement or discharge on account thereof.

The Consultant shall be responsible for any and all damages, or claims for damages for injuries or accidents done or caused by his or her employees, or resulting from the prosecution of the Work, or any of their operations, or caused by reason of the existence of location or condition of the works, or of any materials, plant or machinery used thereon or therein, or which may happen by reason thereof, or arising from any failure, neglect or omission on their part, or on the part of any of their employees to do or perform any or all of the several acts or things required to be done by him or them under and

by these General Conditions, and covenants and agrees to hold the Board, the Toronto and Region Conservation Authority and the City of Toronto, their officers, agents, employees, Consultants and invitees harmless and indemnified for all such damages and claims for damage; and in case of the Consultant's failure, neglect or omission to observe and perform faithfully and strictly, all the provisions of the Work, the COO may, either with or without notice (except where in these Contract Requirements, notice is specially provided for, and then upon giving the notice therein provided for), take such steps, procure such material, plant trucks and men, and do such work or things as he/she may deem advisable toward carrying out and enforcing the same and any such action by the COO as he is herein empowered to take, shall not in any way relieve the Consultant or his/her surety from any liability under the Contract.

9.2 **Insurance and Policies**

Provide minimum \$5,000,000 Commercial Liability Insurance in respect of injury or death to a single person or for property damage in a manner satisfactory to the Chief Operating Officer must be maintained through the Project and included in the Fee Proposal.

Standard automobile liability insurance for all owned vehicles with limits of not less than Two Million Dollars (\$2,000,000.00) per occurrence.

Professional liability insurance (errors and omissions) with limits of not less than One Million Dollars (\$1,000,000.00) per occurrence.

All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the Chief Operating Officer.

All policies of insurance required to be taken out by the Consultant shall be placed with insurers licensed to conduct business in the Province of Ontario and shall be subject to the approval of the COO, acting reasonably.

The Successful firm shall deliver to the Board evidence of the insurance required prior to the commencement of the agreement, in form and detail satisfactory to the CEO acting reasonably.

All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the COO.

The provisions of this section shall no way limit the requirements and obligations imposed on the successful firm elsewhere in the Contract, nor relieve the Consultant from compliance therewith and fulfillment thereof.

The parties agree that insurance policies may be subject to deductible amounts, which deductible amounts shall be borne by the Contract

The Consultant shall, as applicable, conform to and enforce strict compliance with the Occupational Health and Safety Act and for purposes of the Act be designated as the "constructor" for the Service.

The Consultant must adhere to all relevant Zoo policies, including, but not limited to, the Contractor Safety Policy, Working in the Vicinity of Animal Containments Policy and the Vehicles on Site Policy, copies of which the Chief Operating Officer, Toronto Zoo, shall supply to the Consultant

9.3 **Incurred costs**

The Proponent shall bear all costs and expenses with respect to the preparation and submission of its

Proposal and the Proponent's participation in the proposal process (the "Proposal Costs"), including but not limited to: all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board and contract discussions and negotiations.

The Toronto Zoo shall not be responsible for or liable to pay any Proposal Costs of any Proponent regardless of the conduct or outcome of the Proposal Request, Purchase Order process, or Contract process.

The RFP does not constitute an offer or tender by the Toronto Zoo. Receipt of Proposals by the Toronto Zoo pursuant to this RFP or selection or notification confers no rights under any Proposal nor obligates the Toronto Zoo in any manner whatsoever.

9.4 **Liability of Errors**

While the Toronto Zoo has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Toronto Zoo, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

9.5 **Toronto Zoo Rights and Options Reserved:**

The Toronto Zoo reserves the right to award the contract to any proponent who will best serve the interest of the Toronto Zoo. The Toronto Zoo reserves the right, in its sole discretion, to exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- (a) To reject any or all proposals.
- (b) To re-issue this RFP at any time prior to award of work.
- (c) To cancel this RFP with or without issuing another RFP.
- (d) To supplement, amend, substitute or otherwise modify this RFP at any time prior to the selection of one or more proponents for negotiation.
- (e) To accept or reject any or all of the items in any proposal and award the work in whole or in part.
- (f) To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements.
- (g) To permit or reject at the Toronto Zoo's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the proponents following proposal submission.
- (h) To request that some or all of the proponents modify proposals based upon the Toronto Zoo's review and evaluation.
- (i) To request additional or clarifying information or more detailed information from any Proponent at any time, before or after proposal submission, including information inadvertently omitted by the proponent.

9.6 **Cancellation**

Nothing herein shall be construed as giving the Proponent the right to perform the services contemplated under this agreement beyond the time when such services become unsatisfactory to the Toronto Zoo; and in the event that the Proponent shall be discharged before all the services contemplated hereunder have been completed or the services are for any reason terminated, stopped or discontinued because of the inability of the Proponent to serve under this agreement, the Proponent shall be paid only for the portion of the work which shall have been satisfactorily completed at the time of termination.

9.7 **Ownership and Confidentiality of Board-Provided Data**

All correspondence, documentation and information provided by the Toronto Zoo staff to any bidder or prospective Bidder in connection with, or arising out of this RFP, the services or acceptance of the RFP:

9.1.1 is and shall remain the property of the Board;

9.1.2 must be treated by Proponents and Prospective Proponents as confidential;

9.1.3 must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent agreement.

9.8 **Copyright:**

The final product and related materials from the work is to be for the exclusive use of the Toronto Zoo. The Toronto Zoo shall be the only and sole owner of the product and related materials for the sole and unfettered use by the Toronto Zoo. Upon payment of the said product and related materials by the Toronto Zoo, the successful bidder shall have no hold, proprietary claim, ownership, use of any kind, intellectual or otherwise nor shall there be any restrictions placed on the final product and related products by the successful bidder. By submitting a Proposal in this response to this RFP, the Bidder shall thereby acknowledge and agrees that the Toronto Zoo has exclusive ownership and sole and unfettered use of this final product and related products.

9.9 **Ownership and Disclosure of Proposal Documentation**

The documentation composing any Proposal submitted in response to this RFP, along with all correspondence, documentation and information provided to the Toronto Zoo by any Bidder in connection with, or arising of this RFP, once received by the Toronto Zoo:

9.1.4 Shall become property of the Toronto Zoo and may be appended to purchase order issued to the successful Bidder;

9.1.5 Shall be come subject to the *Municipal Freedom of Information and Protection of Privacy Act ("MFIPPA") and may be released pursuant to that Act*

Because of *MFIPPA*, prospective Bidders are advised to identify in their Proposal material any scientific, technical, commercial, proprietary or similar confidential information, the disclosure of which could cause them injury.

Each Bidder's name shall be made public. Proposals will be made available to member of the Board on a confidential basis and may be released to members of the public pursuant to *MFIPPA*.

9.10 **Conflict of Interest Statement**

In its Proposal, the Proponent must disclose to the Toronto Zoo any potential conflict of interest that might comprise the performance of the Work. If such a conflict of interest does exist, the Toronto Zoo may, at its discretion, refuse to consider the Proposal.

The Proponent must also disclose whether it is aware of any Toronto Zoo employee, member of board, agency or commission or employee thereof having a financial interest in the Proponent and the nature of that interest. If such an interest exists or arises during the evaluation process or the negotiation of the Agreement, the Toronto Zoo may, at its discretion, refuse to consider the Proposal or withhold the awarding of any agreement to the Proponent until the matter is resolved to the Toronto Zoo's sole satisfaction.

Proponents are cautioned that the acceptance of their Proposal may preclude them from participating as a Proponent in subsequent projects where a conflict of interest may arise. The Consultant(s) for this project may participate in subsequent/other Toronto Zoo projects provided the Consultant(s) has

(have) satisfied pre-qualification requirement of the Toronto Zoo, if any and in the opinion of the Toronto Zoo, no conflict of interest would adversely affect the performance and successful completion of an Agreement by the Consultant(s).

If, during the Proposal evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to potential conflict of interest, then the Proponent will so inform the Toronto Zoo. If the Toronto Zoo requests, then the Proponent will refuse the new assignment or will take steps as are necessary to remove the conflict of interest concerned.

9.11 No Collusion

A proponent shall not discuss or communicate, directly or indirectly, with any other Proponent or their agent or representative about the preparation of the Proposals, Each proponent shall attest by virtue of signing the Proposal Submission Form that its participation in the RFP process is conducted without any collusion or fraud. If the Toronto Zoo discovers there has been a breach of this requirement at any time, the Toronto Zoo reserves the right to disqualify the Proposal or terminate any ensuing Agreement.

9.12 Education Institute Status

The Toronto Zoo is a registered educational institute and accordingly may be eligible for preferred pricing which should be reflected in the Tender as submitted.

9.13 Charity Status

The Toronto Zoo is a registered charitable organization (registration #BN 119216398RR0001) and accordingly may be eligible for preferred pricing which should be reflected in the Quotation as submitted.

9.14 Governing Law

This RFP and any quotation submitted in response to it and the process contemplated by this RFP including any ensuing Agreement shall be governed by the laws of the Province of Ontario. Any dispute arising out of this RFP or this RFP process will be determined by a court of competent jurisdiction in the Province of Ontario.

9.0 PROPOSAL FORM

The undersigned Proponent having reviewed and fully understood the RFP and all terms and requirements of the RFP and all terms and conditions of the RFP and information provided, hereby submits the attached Proposal and supporting materials (“the Proposal”) in accordance.

I/We, hereby, have received, allowed for and included as part of our submission all issued Addendum numbered _____.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

By submitting a Proposal the Proponent agrees to all of the terms and conditions of this Request for Proposal.

By signing and submitting this proposal, you are agreeing to the release of your proposal information, as deemed necessary by the Board, in order to conduct business associated with this proposal or project.

COMPANY INFORMATION	
Company Name:	
Name of authorized Signing Officer	Title:
Signature:	Date:
Contact Name:	Title:
Address:	
Telephone #:	Fax #:
Email:	Web Site:
HST #:	

DISCOUNT	Discount	Days
Discount allowed for prompt payment and period within which invoice must be paid to qualify.	%	

SUBMISSION LABEL

This address label should be printed and affixed to the front of your sealed tender, quotation and proposal envelope/package submission. Toronto Zoo will not be held responsible for envelopes and packages that are not properly labelled or submitted to an address other than the one listed on this label.

Vendor Name

RFP 10 (2018-09)- BUILDING ASSET MANAGEMENT SYSTEM

Closing: Wednesday, 2018-10-03, 12:00 hours (noon) local time

TO BE RETURNED TO

**TORONTO ZOO
C/O SUPERVISOR, PURCHASING & SUPPLY
ADMINISTRATIVE SUPPORT CENTRE
361A OLD FINCH AVE.
TORONTO, ONTARIO
M1B 5K7**

NOTICE OF NO BID

INSTRUCTIONS:

It is important to the Toronto Zoo to receive a reply from all invited bidders. If you are unable, or do not wish to submit a bid, please complete the following portions of this form. State your reason for not bidding by checking the applicable box(es) or by explaining briefly in the space provided. It is not necessary to return any other Request for Proposal/Quotation/Tender documents or forms. Please just return this completed form by email prior to the official closing date, purchasing@torontozoo.ca

A Proposal/Quotation/Tender is not submitted for the following reason(s):		
<input type="checkbox"/>	Project/quantity too large.	<input type="checkbox"/> Project/quantity too small.
<input type="checkbox"/>	We do not offer services or commodities to these requirements	<input type="checkbox"/> Cannot meet delivery or completion requirement
<input type="checkbox"/>	We do not offer this service or commodity.	<input type="checkbox"/> Agreements with other company do not permit us to sell directly.
<input type="checkbox"/>	Cannot handle due to present commitments.	<input type="checkbox"/> Licensing restrictions
<input type="checkbox"/>	Unable to bid competitively.	<input type="checkbox"/> We do not wish to bid on this service or commodity in the future.
<input type="checkbox"/>	Insufficient information to prepare quote/proposal/tender	<input type="checkbox"/> Specifications are not sufficiently defined
<input type="checkbox"/>	We are unable to meet bonding or insurance requirements.	

<u>Other reasons or additional comments (please explain):</u>

Company Name:	
Address	
Contact Person:	
Signature of Company Representative:	
Date:	
Phone Number:	
Email address	
Fax Number:	

FEE PROPOSAL FORM

Proponent Name				
	FEES	DISBURSEMENTS	HST	TOTAL
Web-based system provision and initial consulting fees for set-up of base software package including all “primary requirements” and any included “secondary requirements”				
Web-based system provision and initial consulting fees for set-up of “secondary requirements” if applicable				
Web-based system provision and initial consulting fees for set-up of “secondary requirements” if applicable				
Web-based system provision and initial consulting fees for set-up of “secondary requirements” if applicable				
Web-based system provision and initial consulting fees for set-up of “secondary requirements” if applicable				
Software subscription cost, annually (if applicable). Clarify if the subscription cost varies based on number of modules purchased.				
Additional maintenance or support costs, annually (if applicable). Clarify if the subscription cost varies based on number of modules purchased.				
Data input cost (lump sum) for the 2015 Toronto Zoo Building Condition Assessment.				
TOTAL COSTS				

Appendix II Building Asset Management System -Primary Requirements

Instructions: If your solution completely meets the identified requirement description, place a Y in the adjoining cell in the **INCLUDED (based functionality)** column. If your solution does not meet the identified requirement description, place a N in the column. If the proposed solution does not satisfy the requirements in full in the "vanilla" version, complete the **COMMENT** column and indicate any solution available or tailoring, customization or other software required along with an indication of additional costs, if any.

LINE #	PRIMARY (MANDATORY) REQUIREMENTS	INCLUDED (base functionality) Y or N	COMMENTS
Description	COMMENTS		
PART A - GENERAL REQUIREMENTS			
1	Software is cloud hosted		
2	Compatible with Windows 7 and Windows 8		
3	System allows for at least 100 users		
4	System to be backed up on a regular basis. The proponent will ensure that best practices for backup and disaster recovery are used.		
5	System to be updated and enhanced regularly		
6	System to be available at least 99% of the time on average		
7	System must have an API available or other method to enable integration with existing or third-party software systems including the Toronto Zoo's existing financial system (MS Dynamics).		
8	Unlimited storage capacity for Toronto Zoo data.		
9	System must be capable of accepting all existing data from the 2015 Toronto Zoo Building Audit (Facility Condition Assessment).		
PART B - TRAINING & SUPPORT			
10	Proponent shall provide unlimited training and technical support as part of the maintenance package.		
11	Provide all trained users with access to user manuals, reference cards, etc.		
12	Proponent must offer toll-free phone, e-mail, and live chat support. Support must be available between the hours of 8:00 a.m. and 4:00 p.m., ET (Eastern Time), Monday through Friday, excluding statutory holidays at a minimum.		
PART C - SYSTEM ADMINISTRATION			
13	System must allow for multiple user types (user, requestor, administrator, etc.)		
14	System must allow users to reset password		
15	A Toronto Zoo IT manager will be able to will administer user access and passwords by configuring, adding, deleting, and modifying user access to the Application.		
16	The software should be available for a minimum of fifteen (15) years		

	PART D - DISPLAY & CUSTOMIZATION		
17	System must include configurable dashboards		
18	System must contain quick link shortcuts to application features		
19	System must provide configurable data views, including: <ul style="list-style-type: none"> • Add/Remove/Move Columns • Sort on columns • Search and filter 		
	PART E - ASSET MANAGEMENT The system shall have the following capabilities:		
20	Ability to accept all assessment data from Toronto Zoo's existing building condition assessment including, but not limited to, the following: <ul style="list-style-type: none"> • Facility, site, component, and sub-component data • Building profile data • Facility overview information • Requirements and recommended actions data • Cost estimates and supporting data 		
21	Auto prioritization of assets		
22	Ability to associate multiple assets (e.g. parent-child relationships)		
23	Ability to associate documents with assets		
24	Ability to attach multiple notes, photos and documents (MS office formats, AutoCAD, Revit, PDF) to an asset		
25	Ability to duplicate an asset		
26	Ability to print asset information		
27	Contains custom fields for asset properties		
28	Allows for trend analysis		
29	Allows for the csv or Excel export of asset data		
30	Ability to assign Asset Criticality values to an asset		
31	Ability to track total cost of ownership and depreciation		
32	Ability to filter through asset history		
33	Ability to auto-generate BOM as parts are added onto a work order		
	PART F - DATA ANALYSIS & MODELLING The system shall have the following capabilities:		
34	Perform FCI calculation of a building, zoogeographic region or asset based on the following: $FCI = (deferred\ maintenance\ costs + renewal\ costs) / (current\ replacement\ cost\ of\ building)$ <ul style="list-style-type: none"> • Renewal costs will include current and future costs as identified in the requirements. The future timeframe will be user selectable from 1 to 5 years in 1 year increments. • Deferred maintenance and renewal costs will include facility and site requirements but the FCI calculation should be capable of excluding or including repairs to site components. 		
35	Ability to support life-cycle analysis for forecasting long-term capital repair costs. The Application will need to accept repetitive major system renewals based on pre-defined or user-defined life-cycle intervals and associated costing.		

36	Ability to model the impact of different funding levels on the FCI as well as be able to model the impact of potential projects on the FCI. This ability must be available for a single Facility or Site, portfolio-wide, or any selected subset of assets.		
37	Ability to create user defined metrics for monitoring and reporting of Key Performance Indicators.		
38	Ability to automatically update FCI when User changes status of a requirement(s) to completed.		
	PART G - CAPITAL REPORTING The system shall have the following capabilities:		
39	Capable of generating multiple-year capital repair plans (number of years to be user-defined between 1 and 20 years) for a given asset or group of assets, based on data entered from Building Condition Assessments.		
40	Ability to generate capital repair plans from any combination of user-selected criteria.		
41	The application shall provide a methodology for ranking all capital needs and applying multi-year budgets to define an annual capital spending plan		
42	Be able to capture the overall organization's priorities. There should be an understanding of how various metrics relate to each other, such as how important life safety issues are to building use, and so forth. The system should be able to rank any and all variables that are associated with assets, systems, specific needs, etc.		
43	Be able to define one or more approaches to the ranking priorities for capital needs, thus allowing for different approaches to be applied to different aspects of the portfolio.		
44	Be able to define budgets for capital needs over multiple years based on a number of different criteria, such as an entered amount, a projected (extrapolated) amount, or a percentage of the total current replacement value. The system should allow multiple budgets to be defined.		
45	Rank all capital needs based upon the defined priorities and apply the defined budgets to create an annual capital spending plan.		
	PART H - COST ESTIMATES The system's costing function shall:		
46	Be updated annually including inflation rates if applicable.		
47	Allow entry of user defined cost adjustment factors to account for special circumstances.		
48	Allow user defined estimated costs to be generated automatically by the Application or manually entered and allow entry of cost adjustment factors.		
49	Be capable of spreading costs over several years to accommodate studies or phased work.		
50	Automatically update costs that are developed using the costing system. The Application will also be able to automatically update manually entered costs using either a costing-system-supplied inflation figure, or a user-supplied inflation figure.		
51	Generate the replacement cost of a Building and will be defined by the Building type and a cost model.		
	PART I - REPORTING The system shall have the following capabilities:		

52	Ability to report on asset cost summary		
53	Ability to report on asset life cycle analysis		
54	Ability to report on asset life cycle analysis with details		
55	Ability to report on asset summary		
56	Ability to produce graphical and / or chart-formatted reports that provide information such as multi-year cost data.		
57	Ability to run graphic reports with or without their respective photographs and / or drawings.		
58	Ability to provide summary and detailed versions of Building condition reports and other lengthy reports.		
59	Application generated reports will be formatted to standard paper sizes and be provided with a font size that is easy to read.		
60	Ability to generate preformatted Facility Condition Assessment report generated with information entered into the Application		
61	Ability to generate preformatted FCI report at various levels of the organization including: <ul style="list-style-type: none"> • facility (single) • facilities (all Facilities on the site) • facilities in a zoogeographic region (i.e. African Savanna) 		
62	Ability to generate preformatted scenario modeling reports, showing or comparing trends, such as Building condition versus funding over time, FCI versus funding over time, funding required to maintain FCI over time, Deferred Maintenance versus funding over time, etc.		
63	Ability to generate other preformatted reports including: <ul style="list-style-type: none"> • reports of recommended studies and placeholder reports • reports by classification (e.g. Priority 1 through 5) • reports by system (e.g., all roofing at all Buildings, all elevators, etc.) • reports by year • reports by cost 		
64	Ability to allow users to select pre-configured or blank layout and construct a report by selecting, sizing and placing pre-defined components (widgets) to setup a fully configurable report. Ability to save report as a user defined report.		
65	Ability to add user defined metrics to reports.		
66	Ability to provide audit logs to report on changes made within the system, when and by which user.		
67	System can provide report format flexibility (e.g. capable to produce reports in .pdf, Excel, and other standard formats)		
68	System shall allow users to save, export, print and share reports		

Appendix III Building Asset Management System -Secondary Requirements

Instructions: If your solution completely meets the identified requirement description, place a Y in the adjoining cell in the **INCLUDED (based functionality)** column. If your solution does not meet the identified requirement description, place a N in the column; in addition, place either a Y or a N on either or both **Optional Functionality (not available in based functionality but can be made available under different module, functionality or software)** and **Customization (will require new specifications and development)** columns. If the proposed solution does not satisfy the requirements in full in the "vanilla" version, complete the **COMMENT** column and indicate any solution available or tailoring, customization or other software required along with an indication of additional costs, if any.

LINE #	SECONDARY (OPTIONAL) REQUIREMENTS				
	Description	INCLUDED (base functionality) Y or N	Optional functionality Y or N	Customization Y or N	COMMENTS
PART E - ASSET MANAGEMENT The system shall have the following capabilities:					
1	Ability to assign assets to a work order				
2	Ability to quickly create work order from asset				
3	System supports asset tagging and scanning with mobile app				
4	Ability to take meter readings				
5	Allows for asset barcoding				
6	Supports label printing				
7	Ability to place assets on a floorplan/drawing				
8	Ability to track Warranty information of all assets				
PART I - REPORTING The system shall have the following capabilities:					
9	Ability to report on purchase order summary				
10	System shall include user configurable dashboards by security role (e.g. admin, branch/division/unit lead, tradesperson) that includes Work Orders, Service Level Agreements and Preventative Maintenance.				
PART J - WORK ORDER MANAGEMENT The system shall have the following capabilities:					
11	System allows requesters to search existing work orders for problem type, trade, etc. when submitting work orders				
12	Ability to archive WRs with all relevant data, e.g. internal notes, attachments (for user defined period)				
13	Ability to receive service requests from desktop or mobile devices				
14	Ability to link a service request to an asset or event				
15	Provide the ability to approve or deny a service request				
16	Contain work request forms to capture critical information				
17	Provide work request forms with custom fields				
18	Ability to capture requestor information on form				
19	Ability to associate multiple work orders				
20	Ability to connect to Sites, Locations, Assets, and other source types				
21	Ability to create custom fields				
22	Ability to assign work to multiple staff				
23	Ability to include notes / comments on work order				
24	Ability to attach photos, manuals and other documents				
25	Ability to assign priority to a work order or work request				

26	Ability to assign a Cost Center to a work order or work request				
27	Ability to export work orders with batch updates				
28	Ability to automatically route work orders to an individual or branch/division/unit based on request type				
29	Ability to add/ assign parts to a work order				
30	Ability to issue purchase orders				
31	Ability to batch re-assign work and ticket statuses				
32	Ability to cost summarize filtered on screen work order results				
	PART K - PREVENTATIVE MAINTENANCE SCHEDULING The system shall have the following capabilities:				
33	Ability to create, manage and control preventative maintenance schedules				
34	Ability to schedule preventative work on a recurring basis (monthly, quarterly, etc.)				
35	Ability to generate preventative work based on meter readings				
36	Ability to have some type of work load planner with Drag and Drop functionality				
37	Ability to tie a Preventative Maintenance to a particular asset or piece of equipment				
38	Ability to set minimum and maximum thresholds on meters to trigger preventative maintenance				
39	Provide Preventative Maintenance templates for scheduling				
40	Ability to view scheduled work orders in a calendar view				
41	Ability to assign parts and personnel to scheduled work				
42	Ability to attach documents to a scheduled work order				
43	Ability to generate labour and materials cost reports				
44	Ability to use captured data from work orders to report on cost data for individual or multiple branches/divisions/units				
45	Ability for unit supervisors to validate work hours				
46	Ability to duplicate, delete or disable scheduled preventative maintenance				
47	Provide Preventative Maintenance Summary report				
	PART L - WORK ORDER REPORTING The system shall be capable of reporting on the following:				
48	Open vs. Completed Work Orders				
49	Actual vs. Estimated Costs and Hours				
50	Category Comparison				
51	Completed On Time/Late Summary				
52	Branch/division/unit Summary				
53	Downtime Analysis				
54	Labour by Type				
55	Labour Cost				
56	Labour Cost by Branch/Division/Unit				
57	Labour Costs by User				
58	Labour Cost Detail				
59	Labour Time Detail				
60	Mean Time to Repair Analysis				
61	Mean Time to Repair Comparison				
62	Part Usage By Asset				
63	Part Usage by Location				
64	Part Usage by Part				
65	Part Usage by Site				
66	Work Order Summary				
	PART M - PARTS MANAGEMENT The system shall have the following capabilities:				
67	System must have the ability to pull inventoried parts and assign them to work orders				

68	Transactions including parts must influence recorded stock levels				
69	System must track storage location of inventoried parts				
70	System must track parts manufacturers and suppliers				
71	System must allow for batch update of parts & import/export of parts				
72	System must allow users to print QR codes, barcodes, labels, etc.				
73	Generate parts category valuation report				
74	Generate report showing parts inventory on hand				
75	Generate part summary report				
76	Generate part transaction report				
77	Generate report on part use				
78	Generate report showing parts on back order				
79	System must also be capable of tracking inventory of plants in the Toronto Zoo's greenhouse and on site.				
	PART N - PURCHASE ORDERS The system shall have the following capabilities:				
80	Create purchase orders from inventoried and non-inventoried items				
81	Email Purchase Orders				
82	Duplicate/ Delete Purchase Orders				
83	Batch update Purchase Orders				
84	Print/ Batch Print Purchase Orders				
	PART O - MOBILE SUPPORT The system shall have the following capabilities:				
85	Accessible from Android and iOS (mobile)				
86	Provide a mobile computing option				
87	Ability to access work order management through mobile devices (e.g. Apple & Android phones/tablets)				
88	Ability to create, update and close work orders in mobile view				
89	Ability to execute workflow approvals through mobile view				
90	Barcode/QR scanning				
91	Ability to execute tasks in offline mode				
92	Map-based service request and work order generation				
93	Ability to attach images/photos to asset/work order				
94	Link to GIS Assets				
95	Easy work order creation				
96	Capture employee device location				
	PART P - GIS The system shall have the following GIS interface capabilities:				
97	Integration to ArcGIS Server OR Ability to Host GIS Data on Entity's behalf				
98	Display all GIS layers with ability to search and toggle layer visibility				
99	Synchronization with GIS-based asset registry				
100	Map-based service request and work order generation				
101	Access GIS mapping in the field				
102	Access data referenced by hyperlinks in GIS data				
103	Manage PM schedules through GIS				
104	Addressing and ESRI geocode service support				
105	View current and historic employee device locations				
106	Measure tools				