



# **THE CORPORATION OF THE TOWNSHIP OF JOLY**

## **Request for Proposal**

### **Asset Management**

### **Asset Management Plan Review and Update**

Request for Proposal No: RFP 2025-01

Date Issued: Wednesday May 14, 2025

RFP Closing date and Time: Thursday July 3, 2025 at 3:00pm

Contact Person: Katey Brimacombe – Deputy Clerk Treasurer  
Township of Joly  
871 Forest Lake Road PO Box 519  
Sundridge, ON P0A 1Z0  
[office@townshipofjoly.com](mailto:office@townshipofjoly.com), (705) 384-5428

---

Lowest or any proposal not necessarily accepted.  
Late proposals will not be accepted.

---



## **Introduction**

### **About The Township of Joly**

The Township of Joly was incorporated in 1890 and is located within the picturesque Almaguin Highlands in the District of Parry Sound. Joly is just east of the Village of Sundridge and abuts the Township of Strong. The world famous Algonquin Park lies a few kilometers from the township's eastern border. Joly has an abundance of natural beauty found in its many lakes, rivers and trails that can be enjoyed throughout the year. Joly has a public beach at Lynch Lake and a public boat launch on Forest Lake.

Residents enjoy a wide variety of services and amenities in the neighboring municipalities including the Sundridge-Strong-Joly (SSJ) Arena, Sundridge-Strong Union Public Library, Sundridge & District Medical Centre and fire response services from the Sundridge-Strong Fire Department as well as South River-Machar Fire Department. Landfill services are available as a shared service with the Township of Strong.

The Village of Sundridge, Township of Strong and Township of Joly are three municipalities that are an integral part of the Almaguin Highlands Area. The three municipalities work together through shared services of facilities that benefit the residents and stakeholders of the community. The Village of Sundridge and Township of Joly share boundaries with the Township of Strong. Located approximately 3 hours north of Toronto, the clean and relaxed living atmosphere magnifies the friendly rural vibe found in the area. The municipalities have a combination of year-round and seasonal populations and the Township of Joly incorporates a large portion of crown land.

The Municipality has a road network consisting of a combination of paved and unpaved roads, bridges and culverts, a municipal office and road department. Shared assets between all three municipalities include the Sundridge Strong Joly Arena, Sundridge and District Medical Centre, High Rock Lookout Park, and a Cenotaph property.

## **Background**

The last Asset Management Plan was completed in 2013. Joly needs an updated plan in order to comply with AMO and requirements for Federal and Provincial Funding Programs. The Township has a Roads Needs study and Bridge Study which were completed in 2024/2025.



## **Type of Contact for Services**

Develop a comprehensive asset management for the Municipality.

A mandatory requirement for the asset management plan be provided electronically in a format which can be uploaded or manipulated into a future asset management software (eg. MS Excel) or the Municipalities' finance system.

## **Compliance with Applicable Laws**

A condition of the Agreement is the requirement that the successful Proponent comply with all applicable laws of Ontario and Canada, including the Occupational Health and Safety Act (Ontario), the Ontario Human Rights Code, the Pay Equity Act (Ontario), the Accessibility for Ontarians with Disabilities Act (AODA) and applicable privacy statutes in the Province of Ontario.

## **RFP Documentation**

This RFP consists of this document and any subsequent addenda (if issued).

## **Definitions**

Unless otherwise specified in this RFP, capitalized words and phrases have their prescribed meaning as set out in the Agreement.

**Agreement** means the Agreement that the successful Proponent enters into with the Municipality.

**Days** mean Business Days unless the term calendar days is specifically used.

**Evaluation Team** means the individuals who have been selected by the Municipality to evaluate the Proposals, including, if deemed necessary, an oral presentation.

**Municipality** refers to the Township of Joly

**Must and Shall** indicate a mandatory requirement that in the view of the Municipality must be substantially completed and complied with in order for a Proposal not to be rejected.



**Prime Contractor** means a single Proponent that proposes to assume full contractual and financial liability for their participation. A prime contractor may or may not have sub contractors.

**Proponent** means the respondent to this RFP.

**Proposal** means all the documentation submitted by the Proponent in response to the Request for Proposal, which has been accepted by the Municipality, in whole or in part. The terms "response" and "submission" are also used to mean Proposal.

**Request for Proposal** or RFP means the Request for Proposal issued by the Municipalities for goods or services and any addenda thereto.

**Services** mean all services and deliverables to be provided by the Proponent to the Municipality

**Should** indicates a requirement that the Municipality would like the Proponent to address in its Proposal.

**Subcontractor** means any Person having a contract with the Supplier for the performance of a part or parts of the Services.

**Supplier** means the successful Proponent that has signed the Agreement.

**Municipal Contact** means the person designated by the Municipality to be the contact person during the procurement process.

### **Asset Management Plan**

#### **Required Plan**

The Municipality's asset management plans must be upgraded to include all asset classes that are included in the Financial Information Return (FIR). Proponents must familiarize themselves with the requirements of the "Building Together: Guide for Municipal Asset Management Plans" and the AMO requirements. The following provides an indication of the expectations of the Municipality for each topic:

#### **1. Executive Summary**

The executive summary should provide an overview of the plan that can be extracted for publication and/or report purposes.



## **2. Introduction**

This section will provide sufficient detail to use as a supporting document for the executive summary, tying together the long term planning documents within the municipal structure.

## **3. State of Local Infrastructure**

The municipality has an inventory list of all assets that was collected for the purposes of complying with PSAB 3150 requirements. All assets owned by the Municipality shall be included in the respective Asset Management Plans. Condition ratings must be carried out on all assets that that were not completed in the original asset management plans and for any new assets being included in the revised plans.

## **4. Desired Levels of Service**

Levels of service were considered for the original plan but not measurable. The Proponent shall facilitate a session with the Municipality to discuss and determine the appropriateness of existing levels of service and performance measures and to determine specific and measurable levels of service and performance measures for the updated Asset Management Plans.

## **5. Asset Management Strategy**

Specific and/or formal strategies have not been determined or documented by the Municipality. The plans should identify the infrastructure spending gap both overall and the annual spending gap/deficit. The Proponent shall facilitate a session with the Municipality to determine and document appropriate asset management strategies and incorporate planning for prioritization over a 10 year period.

## **6. Integration with Existing Software or Future Asset Management Planning Software**

The Municipality's asset registry is currently maintained within MS Excel. It is essential that any software solution intended by the Proponent should seamlessly integrate with the existing asset registry or provide a system which will enable the municipality to have one system which will enable staff to update and maintain the asset registry.

## **7. Financing Strategy**

This section is critical to the success of the asset management plan in terms of Council support, implementation and on-going use. The financing strategy must



be fair, reasonable and achievable and must reflect the Municipality's ability to pay. The financing strategy should lay out a 10-year financing strategy which coincides with the municipalities' prioritization schedule.

The Municipality recognizes there are varying degrees of detail that can be provided through a study such as an asset management plan. While we are not looking for a level of plan that barely meets Provincial and Federal requirements, neither are we looking to have highly detailed plans that are onerous to build, document and maintain. The Municipality would prefer a reasonable level of detail such that segmentation is appropriate, easy to understand and readily communicable to a wide variety of stakeholders including staff, Council and the public. This "reasonable" level of detail will be determined in part by the asset inventory listing provided by the Municipality, in part by the Proponent's recommendations and in part through discussion and negotiation as the project proceeds.

### **Current State of Asset Management**

1. All tangible capital assets are recorded and depreciated within MS Excel spreadsheets. All information is recorded in the municipal software systems through journal entries at year end.
2. The Municipality has existing asset management plans which were approved by Council in 2013. These asset management plans cover the "core infrastructure" for the following classes:
  - Existing Buildings
  - Investment Properties
  - Maintenance Equipment
  - Office Furnishings and Supplies
  - Municipal Roads and Culverts
  - Municipal Bridges
3. Roads Needs Study was completed in 2025 and Bridge report was completed in 2024. The previous asset management plans are available on <https://townshipofjoly.com/uploads/documents/plans-reports-forms/Joly%20Township%20Asset%20Management%20Plan.pdf>

[www.townshipofjoly.com](http://www.townshipofjoly.com)



## **Deliverables**

Proponents will be expected to provide the Municipalities with the following:

1. Presentation of a draft report and associated findings to municipal staff by, at the latest, the end of October 2025.
2. Presentation of final report including analysis and recommendations to the respective municipal Councils by, at the latest, end of November 2025.
3. Submission of an electronic copy (PDF) of the final Asset Management Plan.
4. Submission of electronic copies (excel) of schedules and detailed information so that the Municipality may take ownership of the on-going updating and/or revisioning over time, as needs, goals and assets change. Further, the spreadsheets shall be set up in such a fashion as to protect modelling aspects of the database and have appropriate input cells for changes in policy or outcomes.

## **Time Lines**

<b>Issue of RFP</b>	May 14, 2025
<b>Deadline for Submission</b>	June 24, 2025
<b>Presentation of Draft Report</b>	October 2025
<b>Presentation of Final Report</b>	November 2025

## **Proposal Requirements**

### **Proponent Requirements**

To fulfill the expectations and provide the services described in this RFP, Proponents must:

1. Have extensive research and analytical skills, a thorough knowledge of asset management principles and have proven project management experience. Creativity and excellent interpersonal, written and verbal communication skills are essential.
2. Have a record of working with municipal government and non-profit organizations on issues of strategic planning, economic and community development and marketing. Preference will be given to those proponents



with a history of successful projects in Ontario municipalities with a Rural composition.

3. Be aware of the sensitive nature of the information that may be acquired from the Municipality and the requisite level of confidentiality that may be required.

### **Proponent Profile**

Proponents must provide a profile of the organization/individuals working on the project. This includes:

1. Identify the main contact person to liaise with the Municipality's representative.
2. A summary of why the respondents believe his/her firm or persons is qualified to undertake the project as described in this RFP.

### **Project Approach**

Respondents to this RFP should demonstrate a clear understanding of the assignment including but not limited to:

A proposed timetable to undertake each of the activities proposed, leading up to the final presentation. This will include, but not be limited to: the start and finish times for each activity, specific costs for each activity, the name of the persons who would be responsible for overseeing each activity, and the deliverables associated with each activity.

### **Proposal Requirements**

Hard or electronic copy of the Proponent's submission shall be submitted by 3:00pm local time on Tuesday, June 24th, 2025. Submitted proposals in response to this RFP shall include:

- Signing Page (see appendix A)
- Proposal Covering and Acceptance Letter
- Budget  
Proponents must clearly indicate the costs for each stage and activity of the Plan, with related taxes stated separately and a proposed payment schedule
- Work Schedule  
The proponent must include a detailed work schedule





- Acknowledgment of addenda (if issued)

## **Remuneration and Agreement**

The successful Proponent will be required to execute an Agreement with the Municipality. The Agreement will be subject to the Municipality's standard Terms and Conditions.

Among other things, the Agreement will provide that the Proponent will not undertake any work that is beyond the established terms of reference, without the written authorization of the Municipality. In particular, the fees directly associated with the provision of the Services will be the total cost of the work and will not be exceeded without the Municipalities written approval.

## **Evaluation and Award**

### **Evaluation Criteria**

Submitted proposals will be evaluated against criteria that will include:

- Creative and innovative approach to the project (15%)
- Work schedule / timelines (20%)
- Team experience, qualifications, and successful completion of similar projects (25%)
- Demonstrated understanding of the project and scope of work (15%)
- Fee structure to complete the project (25%)

### **Evaluation Team**

An evaluation Team, comprised of staff from the Municipality will assess the Proposals. A report to Council will be providing at the regular meeting of Council on Tuesday, July 8<sup>th</sup> at 5:30 pm.

### **References**

Some scores assigned to various categories may be determined through reference checks.



## **Interviews**

The Evaluation Team may elect to interview some or all of the Proponents and their key staff at its sole discretion.

## **Proposal Evaluation Process**

The evaluation stage will consist of a scoring by the Evaluation Team of each qualified Proposal on the basis of the Rated Criteria of the written Proposals. The highest scored Proposal, representing best overall value to the Municipality, will be recommended for selection by the Evaluation Team.

In the event that the Municipalities are unable to successfully execute an Agreement with the first- ranked Proponent in a timely manner, the Municipality may invite the next ranked Proponent to finalize an Agreement with the Municipality.

## **Recommendation / Award**

Recommendation for award of this Proposal will be based on the Proponent's overall total score. By responding to this RFP, the Proponent agrees to accept the recommendation of the Evaluation Team as final and binding.

## **Terms and Conditions of the RFP Process**

### **Proponents to Follow Instructions**

Proponents should structure their Proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a Proposal should reference the applicable section numbers of the RFP where that request is made.

## **Communication After Issuance of RFP**

### **Proponents to Review RFP**

Proponents shall promptly examine all of the documents comprising this RFP and

1. Shall report any errors, omissions or ambiguities; and



2. May direct questions or seek additional information by email, on or before the Proponent's Deadline for Questions to the Municipality's Contact. No such communications are to be directed to anyone other than the Municipality's Contact. The Municipality are under no obligation to provide additional information but may do so at its sole discretion.

**Municipality Contact for this RFP is :**

Katey Brimacombe – Deputy Clerk Treasurer  
Township of Joly  
871 Forest Lake Road  
Sundridge, ON  
P0A 1Z0  
705-384-5428  
[office@townshipofjoly.com](mailto:office@townshipofjoly.com)

**Alternative Contact**

Jennifer Martin – Municipal Administrator  
Township of Joly  
871 Forest Lake Road  
Sundridge, ON  
P0A 1Z0  
705-384-5428

**All New Information to Proponents by way of Addenda**

This RFP may be amended by an addendum in accordance with this section. If the Municipality, for any reason, determine that it is necessary to provide additional information relating to this RFP, such information will be communicated to all Proponents by addenda. Each addendum shall form an integral part of this RFP.

Such addenda may contain important information including significant changes to this RFP. It is the sole responsibility of the Proponent to register their intention to submit a proposal with the Municipality in order to be placed on the distribution list for any addenda. Proponents are responsible for obtaining all addenda issued by the Municipality. Proponents shall confirm their receipt of all addenda by including the Addenda Acknowledgement page (appendix B) by setting out the number of each addenda in the space provided.



### **Post-Deadline Addenda and Extension of Proposal Submission Deadline**

If any addenda are issued after the Deadline for Issuing Addenda, the Municipality may at its discretion extend the Proposal Submission Deadline for a reasonable amount of time.

### **Submission of Proposals**

#### **Proposals Submitted Only in Prescribed Manner**

Proposals must be submitted by the following method: A Proponent must submit:

- a) Proposal may be submitted via hard copy in person or in the mail, or electronic copy emailed to [office@townshipofjoly.com](mailto:office@townshipofjoly.com).
- b) Proposal package must be prominently marked with the RFP title, with the full legal name and return address of the Proponent, with the Proposal Submission Deadline date and time.

### **Amending or Withdrawing Proposals Prior to Submission Deadline**

At any time prior to the Proposal Submission Deadline, a Proponent may amend or withdraw a submitted Proposal. The right of a Proponent to amend or withdraw a Proposal includes amendments or withdrawals wholly initiated by the Proponent and amendments or withdrawals in response to subsequent information provided by the Municipality.

Any amendment should clearly indicate what part of the Proposal the amendment is intending to replace.

Any amendment or notice of withdrawal must be submitted in the same manner as prescribed in this RFP for the submission of Proposals. Any amendment or notice of withdrawal submitted by any other method will not be accepted

### **Proposal Irrevocable after Proposal Submission Deadline**

Proposals shall remain irrevocable in the form submitted by the Proponent for a period of sixty (60) days from the Proposal Submission Deadline.

The Municipality May Seek Clarification and Incorporate Response Into Proposal



The Municipality reserve the right to seek clarification and supplementary information from Proponents after the Proposal Submission Deadline. Any response received by the Municipalities from a Proponent shall, if accepted by the Municipalities, form an integral part of that Proponent's Proposal.

### **RFP Incorporated into Proposal**

All of the provisions of this RFP are deemed to be accepted by each Proponent and incorporated into each Proponent's Proposal.

Except where expressly set out to the contrary in this RFP, the Proposal and any accompanying documentation submitted by a Proponent shall become the property of the Municipality and shall not be returned.

### **Execution of Agreement**

#### **Selection of Proponent**

The Municipality anticipate that a Proponent will be selected within 30 days of the Proposal Submission Deadline. Notice of selection by the Municipalities to the selected Proponent will be in writing. The selected Proponent shall execute the Agreement and satisfy any other applicable conditions of this RFP within 15 days of notice of selection.

#### **Failure to Enter Agreement**

In addition to the Municipality other remedies, if a selected Proponent fails to execute the Agreement or satisfy any other applicable condition within 30 days of notice of selection, the Municipality may, in its sole discretion and without incurring any liability, rescind the selection of that Proponent.

#### **Notification to Other Proponents of Award and Debriefing**

Once an Agreement is executed between the successful Proponent and the Municipality, the other Proponents will be notified by the Municipality Contact in writing via email.

### **Prohibited Communication and Confidential Information**

#### **Prohibited Proponent Communications**



Any attempt on the part of any Proponent or any of its employees, agents, contractors or representatives to contact any person other than the Municipality's Contact with respect to this RFP, will be grounds for disqualification. For clarification and without limiting the generality of the foregoing, no attempt will be made to contact any member of the Municipality's Evaluation Team, Senior Leadership Team, elected officials or any expert or other adviser assisting the Municipality's Evaluation Team.

In such event, and without any liability, the Municipality may, in its sole discretion and absolute discretion, in addition to any other remedies available by law, disqualify the Proposal submitted by the Proponent.

### **Proponent Not to Communicate with Media**

A Proponent may not at any time directly or indirectly communicate with the media in relation to this RFP or any contract awarded pursuant to this RFP without first obtaining the written permission of the Municipality.

### **Confidential Information of the Municipality**

All information provided by or obtained from the Municipality in any form in connection with this RFP either before or after the issuance of this RFP:

- a) Is the sole property of the Municipalities and must be treated as confidential;
- b) Is not to be used for any purpose other than replying to this RFP and the performance of any subsequent Agreement;
- c) Must not be disclosed without prior written authorization from the Municipality; and
- d) Shall be returned by the Proponents to the Municipalities immediately upon the request of the Municipality.

### **Subject to Municipal Freedom of Information and Protection of Privacy Act**

Information provided by a Proponent may be released in accordance with the Municipal Freedom of Information and Privacy Act R.S.O. 1990, c.M 56, as amended. A Proponent shall identify any information in its Proposal or any accompanying documentation for which confidentiality is to be maintained by the Municipality. The confidentiality of such information will be maintained by the Municipality, except where an order by the Information and Privacy Commission or a court requires the Municipalities to do otherwise.



## **Rights of the Municipalities**

In addition to any other expressed rights or any other rights which may be implied in the circumstances, the Municipality reserve the rights to:

- a) Make public the names of any or all Proponents;
- b) Request written clarification or the submission of supplementary written information from any Proponent;
- c) Waive formalities and accept Proposals which substantially comply with the requirements of the RFP;
- d) Verify with any Proponent or with a third party any information set out in a Proposal;
- e) Check references other than those provided by any Proponent;
- f) Disqualify any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information;
- g) Disqualify any Proponent or the Proposal of any Proponent who has engaged in conduct prohibited by this RFP;
- h) Make changes, including substantial changes, to this RFP provided that those changes are issued by way of addenda in the manner set out in this RFP;
- i) Accept or reject a Proposal if only one Proposal is submitted;
- j) Select any Proponent other than the Proponent whose Proposal reflects the lowest cost to the Municipalities;
- k) Cancel this RFP process at any stage;
- l) Cancel this RFP process at any stage and issue a new RFP for the same or similar services;
- m) Accept any Proposal in whole or in part, provided that doing so complies with the Municipalities' Procurement Policies and other applicable laws;
- n) Discuss with any Proponent different or additional terms to those contemplated in this RFP or in any Proponent's Proposal;
- o) Reject any or all Proposals in its absolute discretion; and the Municipality shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Proponent or any third party resulting from the Municipality exercising any of its express rights under this RFP or exercising any rights which may be implied in the circumstances.

By submitting a Proposal, the Proponent authorizes the collection by the Municipality of the information set out under (d) and (e) in the manner contemplated in those subparagraphs.

## **Governing Law of RFP Process**

This RFP process shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein.



## Signing Page (Appendix A)

**All responses should be signed**

---

### **Asset Management Plan Review and Update**

I/We certify that the information provided in this RFP Response Document is true and complete.

I/We declare that no employee of the Township of Joly is or will become interested, directly or indirectly as a contracting party or otherwise in the supplies, work or business to which it relates or in any portion of the profits thereof, or in any such supplies to be therein or in any of the monies derived there from.

I/We further declare that the undersigned is empowered by the Proponent to negotiate all matters with the partnering municipalities' representatives, relative to this Proposal.

I/We further declare that the agent listed below is hereby authorized by the Proponent to submit this Proposal and is authorized to negotiate on behalf of the Proponent.

Legal Name:	
Respondent's Signature:	
Respondent's Printed Name:	
Email:	
Phone:	
Address:	



ATTACH THIS LABEL SHEET TO THE FRONT OF YOUR PROPOSAL ENVELOPE/ EMAIL PACKAGE SUBMISSION

PROPOSAL TO BE RETURNED TO:  
Township of Joly

Attn: Katey Brimacombe Deputy Clerk Treasurer  
871 Forest Lake Road  
PO BOX 519  
SUNDRIDGE, ON P0A 1Z0

RFP 2025-01

# Request For Proposal: Asset Management Plan Review and Update

Proponent's Name: \_\_\_\_\_

Address: \_\_\_\_\_

For Office Use Only

Date and Time Received: