



**Revised – Request for Proposal  
for the Provision of**

**2022 Municipal Elections Internet and Telephone Voting Services  
RFP - WGITV21-07**

Issue Date: October 26, 2021

Closing Date: Extended from November 18 to **December 8, 2021**

Time: 1:59:59 pm Local (EST) Time

Location: West Grey Municipal Office  
402813 Grey Road 4  
R.R. 2  
Durham, ON N0G 1R0

Attention: Genevieve Scharback, Director of Administration/Clerk

## Instructions to respondents

### Section 1.0 – General conditions

#### 1.1 Form of proposal

All proposals must be upon the forms provided:

- 1.1.1 Proposal form
- 1.1.2 Proponent information form
- 1.1.3 Proponent ability and experience form
- 1.1.4 Proponent proposal details including experience, qualifications and work plan (excluding all pricing)
- 1.1.5 Pricing form – to be sealed in envelope No. 2

#### 1.2 Submission process

The Corporation of the Municipality of West Grey requires one hard copy of proposals in addition to a digital version in PDF format provided. Materials must be submitted to the municipal office either in person or by courier.

Sealed Proposals marked “RFP WGITV21-07 – 2022 Municipal Elections Internet and Telephone Voting Services” will be received by:

Genevieve Scharback, Director of Administration/Clerk  
Corporation of the Municipality of West Grey  
402813 Grey Road 4  
R.R. 2  
Durham, ON N0G 1R0

**Revised:** Until 1:59:59 p.m. local time on **Wednesday, December 8, 2021**

#### 1.3 Definitions

- Corporation: Refers to “The Corporation of the Municipality of West Grey”
- Municipality: Refers to “The Corporation of the Municipality of West Grey”
- Proponent/respondent: Refers to “any eligible entity providing a proposal”
- Successful respondent: Refers, in the event of an award, “to the selected respondent”
- RFP: Refers to “request for proposal”

#### 1.4 Proposal closing

Proposal submissions must be received by the Corporation of the Municipality of West Grey by:

**Revised: 1:59:59 PM local time, December 8, 2021**

### **1.5 Late submissions**

Late submissions will not be received or opened.

### **1.6 Proposal opening**

Respondents are advised there will **not** be a public opening for this RFP. Submissions received, by the date and time of closing, will be opened administratively by respective members of the Corporation at a time subsequent to the closing.

### **1.7 Last date for questions**

Questions/queries regarding the proposal will only be received until 4 p.m. local (EST) time three (3) days prior to closing date.

**Revised:** Responses will be posted as an addendum on the West Grey corporate website [www.westgrey.com](http://www.westgrey.com). It is the respondent's sole responsibility to check the website often to inform themselves of any posted addenda.

### **1.8 Completion of the proposal**

All items shall be submitted according to any instruction in the request for proposal documents.

Proposals which are incomplete, conditional, illegible or obscure, or that contain additions not called for, reservations, erasures, alterations incorrectly submitted, or irregularities of any kind may be rejected.

### **1.9 Proposal withdrawal**

Bidders may request withdrawal of their proposal at any time prior to the time of closing. Please contact the municipality.

The withdrawal of a proposal does not disqualify a proponent from submitting another proposal prior to the closing time.

### **1.10 Respondent expense**

Any expenses incurred by the respondent in the preparation of the proposal submission are entirely the responsibility of the respondent and will not be charged to the Corporation.

### **1.11 Examination of request for proposal documents**

Each respondent must satisfy themselves by a personal study of the RFP documents, by calculations, and by personal inspection of the site, respecting the conditions existing or likely to exist in connection with the proposed work. There will be no consideration of any claim, after submission of proposals, that there is a misunderstanding with respect to the conditions imposed by this RFP.

Prices must include all incidental costs and the respondent must be satisfied as to the full requirements of the RFP. No claims for extra work will be entertained and any additional works must be authorized in writing prior to commencement. Should the respondent require more information or clarification on any point, it must be obtained prior to the submission of the RFP.

## **1.12 Inquiries, discrepancies and interpretations**

Should a respondent find omissions from or discrepancies in any of the RFP documents, or should the respondent be in doubt as to the meaning of any part of such documents, the respondent shall notify the designated person and office without delay. If the designated person considers that a correction, explanation or interpretation is necessary or desirable, an addendum will be issued to all who have received RFP documents.

No oral explanation or interpretation will modify any of the requirements or provisions of the proposal documents.

## **1.13 Acceptance or rejection of proposals**

**1.13.1** The Corporation reserves the right to reject any or all proposals, and to waive formalities as the interests of the Corporation may require without stating reasons therefore.

Notwithstanding and without restricting the generality of the statement immediately above, the Corporation shall not be required to accept or award a proposal, or recall the proposals at a later date:

- a) When only one (1) proposal has been received as a result of the proposal call.
- b) Where the most responsive and responsible respondent substantially exceeds the estimated cost of the goods or service.
- c) When all proposals received fail to comply with the specifications or proposal terms and conditions.
- d) Where a change in the scope of work or specifications is required.

**1.13.2** The Corporation shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any respondent by reason of the acceptance or the non-acceptance by the Corporation of any proposal or by reason of any delay in the acceptance of a proposal, except as provided in the proposal document.

**1.13.3** Each proposal shall be open for acceptance by the Corporation for a period of twenty (20) calendar days following the date of closing.

**1.13.4** Where the proposal documents do not state a definite delivery/work schedule and a submitted proposal is based on an unreasonable delivery/work schedule, the proposal may be rejected.

#### **1.14 Errors and/or omissions**

The Corporation shall not be held liable for any errors and/or omissions in any part of this RFP. While the Corporation has used considerable efforts to ensure an accurate representation of information in this RFP, the information contained in the RFP is supplied solely as a guideline for respondents. The information is not guaranteed or warranted to be accurate by the Corporation, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve the respondents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

#### **1.15 Addenda**

Addenda will be posted on westgrey.com. It is the respondent's sole responsibility to check the website often to inform themselves of any posted addenda.

Respondents shall be required to acknowledge receipt of addenda on the respondent's proposal form contained in the proposal document.

#### **1.16 Proposal award procedures**

Unless stated otherwise, the following procedures will apply:

- 1.16.1** The Corporation will notify the successful respondent of the award, in writing, within twenty (20) calendar days of the proposal closing.
- 1.16.2** Immediately after acceptance of the proposal by the Corporation, the successful respondent shall provide the Corporation with the certificate of liability insurance, if required, and any other required documents within fourteen (14) calendar days of the date of notification of acceptance and award.

#### **1.17 Ability and experience of respondent**

The Corporation of the Municipality of West Grey will not award this contract to any respondent who does not furnish satisfactory evidence of possessing the ability and experience in this class of work and sufficient capital and equipment/manpower to ensure acceptable performance and completion of the proposal. Any proposal will be considered non-compliant if reference checks or experience is deemed unsatisfactory, in the opinion of the municipality.

#### **1.18 Indemnification**

The successful respondent shall indemnify and hold harmless the Corporation, its officers and employees from and against any and all liabilities, claims, demands, loss, cost, damages, actions, suits or other proceedings by whomsoever made, directly or indirectly arising out of the project attributable to bodily injury, sickness, disease or death or to damage to or destruction of tangible property caused by any acts or omissions of the respondent, its officers, agents, servants, employees, customers, invitees or licensees, or occurring in or

on the premises or any part thereof and, as a result of activities under this project. Neither the owner nor the successful respondent shall be obligated to indemnify the other party in any manner whatsoever for the other party's own negligence or for the negligence of anyone other than their own officers, agents, servants, employees, customers, invitees or licensees.

This indemnity shall survive the expiration or early termination of this agreement and continue in full force and effect.

#### **1.19 Accessibility for Ontarians with Disabilities Act, 2005 (AODA)**

Under the Accessibility for Ontarians with Disabilities Act, 2005, as may be amended from time to time, the successful respondent providing the services contemplated herein shall ensure that every person in relation to this contract, who deals with members of the public or other third parties on behalf of the Corporation, or provides goods, services, or facilities on behalf of the Corporation, has received all training required by Section 6 of Ontario Regulation 429/07, Accessibility Standards for Customer Service, and Section 7 of Ontario Regulation 191/11, Integrated Accessibility Standards.

#### **1.20 Regulation compliance and legislation**

The successful respondent shall ensure all services and products provided in respect to this proposal are in accordance with, and under authorization of all applicable authorities, municipal, provincial and/or federal legislation and standards.

#### **1.21 Sub-consultants**

No sub-consultants or collateral agreements shall be permitted with respect to the work of this assignment, except with the Corporation's express written consent and, in advance of commencement of sub-consultant activities.

Failure to obtain this consent may result in cancellation of the contract with the successful respondent.

#### **1.22 Retrieval of official document and addenda**

Only documents found on westgrey.com are to be considered the "official" documents. The Corporation accepts no responsibility for the accuracy of information found on other websites. The onus is on the respondent to check this site to verify they have received all relevant information.

Addenda will be posted on westgrey.com. It is the respondent's sole responsibility to check the website often to inform themselves of any posted addenda.

#### **1.23 Character and employment of workers**

The successful respondent shall employ only orderly, competent, and skillful employees to ensure that the services are carried out in a respectable manner.

In the event that any person employed by the successful respondent in connection with the service arising out of this proposal gives, in the opinion of the Corporation, just cause for complaint, the successful respondent upon notification by the Corporation in writing, shall not permit such person to continue in any future service arising out of this proposal.

#### **1.24 Governing laws**

This proposal and subsequent contract/agreements will be interpreted and governed by the laws of the Province of Ontario.

#### **1.25 Freedom of information**

All correspondence, documentation and information provided shall become the property of the municipality. Any personal information required on the documentation presented is received under the authority of the Municipal Freedom of Information and Protection of Privacy Act, 1989, RSO, 1990. This information will be an integral component of the quote submission.

All written proposals received by the municipality become a public record, once a proposal is accepted by the Corporation of the Municipality of West Grey and a contract is signed, all information contained in them is available to the public, including personal information.

Questions about collection of personal information and the Municipal Freedom of Information and Protection of Privacy Act, 1989, R.S.O. 1990, Chapter M.56, as amended, should be directed to:

**Director of Administration/Clerk,  
Municipality of West Grey  
402813 Grey Rd 4  
R.R. 2 Durham, ON N0G 1R0  
Telephone 519-369-2200**

The clerk has been designated by The Corporation of the Municipality of West Grey council to carry out the responsibilities of the Act.

## **Section 2.0 – Specific conditions**

### **2.1 Notification of award**

The Corporation will notify only the successful vendor in writing. The proposals to offer products and/or services in accordance with this RFP are to be held firm for a minimum of ninety (90) days. Please note the municipality reserves the right to not award any respondent upon completion of this request for proposal process.

### **2.2 Patent, copyright or other proprietary rights**

In accordance with Municipal Freedom of Information and Protection of Privacy Act, respondents are reminded to clearly identify in their proposal material, any specific scientific, technical, commercial, proprietary, intellectual or similar confidential information, the disclosure of which could cause them injury or damage.

Respondents are encouraged to place all such details and information within a separate section of their submission. Complete proposal details are not to be identified as “confidential”.

### **2.3 Pricing**

No alterations, additions or deletions from the accepted proposal price will be permitted without the prior written approval of the Corporation.

### **2.4 Payment**

The normal terms of payment for the Corporation will be net thirty (30) calendar days. Invoices for such services shall be forwarded to the Corporation of the Municipality of West Grey finance department for processing.

### **2.5 Performance**

Any undue delays in the execution of the work and/or costs incurred by the Corporation due to inefficiencies in performance on behalf of the successful respondent shall be deemed to be the responsibility of that respondent and as such, any and all costs, as deemed appropriate and reasonable compensation for the Corporation, will be assessed to the successful respondent.

### **2.6 Failure to perform**

Failure of the consultant to perform in accordance with submitted specifications will void the contract.

### **2.7 Assignment of contract**

The successful respondent shall not assign transfer, convey, sublet or otherwise dispose of this contract or his/her right, title or interest therein, or his power to execute such contract, to any other person, company or Corporation, without the

previous consent, in writing, of the Corporation's officials, which consent shall not be unreasonably withheld.

## **2.8 Proposal evaluation**

The specific evaluation criteria are as stipulated under Section 4.0 of the RFP. All submissions must be in compliance with the requirements of the RFP process in order to be considered for evaluation.

## **2.9 Liability insurance**

The successful bidder shall, at its expense, obtain and keep in force during the term of this agreement, insurance satisfactory to the Corporation of the Municipality of West Grey, including the following and underwritten by an insurer licensed to conduct business in the Province of Ontario:

- a. Commercial general liability with a limit of liability of not less than \$2,000,000/occurrence, including:
  - i) The owner shall be named as an additional insured including a provision for cross liability.
- b. Professional liability with limits of not less than \$1,000,000.
- c. That thirty (30) days prior notice of an alteration, cancellation or material change in policy terms which reduces coverages, shall be given in writing to the owner.

## **2.10 Certificate of insurance**

Within fourteen (14) days of award, the successful proponent shall provide the municipality with a certificate of insurance acceptable to the municipality and, if requested by the municipality, certified copies of the insurance policies. The certificate of insurance must comply with the insurance requirements outlined in this bid solicitation. If the certificate of insurance is provided in a non-original form (e.g., a facsimile, photocopy or scanned electronic copy), the proponent acknowledges and agrees that the municipality is fully entitled to treat any such certificate as an original and that the proponent will be responsible for the accuracy and validity of the information contained therein.

## **2.11 Health and safety/WSIB**

The successful bidder is responsible for all costs associated with its workplace accidents and all premiums or assessments owing to the Workplace Safety and Insurance Board (WSIB), or insurance company if applicable for its own employees. If requested, the successful bidder shall, throughout the term of the agreement, provide the municipality with evidence of coverage for itself, its employees, sub-contractors and sub-contractors' employees under the Workplace Safety and Insurance Act or insurance policy.

The successful bidder shall comply with the Occupational Health and Safety Act (Ontario), the Workplace Safety and Insurance Act (Ontario), the Human Rights

Act (Ontario), and applicable regulations under such legislation and all other legal obligations with respect to worker health, safety and treatment.

## **2.12 Limited liabilities**

The Corporation's liability under this proposal shall be limited to the actual goods/services ordered and provided.

## **2.13 Extra work**

No work shall be regarded as extra work, unless it is ordered in writing by the Corporation and with the agreed price for the same specified in said order, provided said price is not otherwise determined by the proposal. A statement of the cost of extra work shall be made within thirty (30) calendar days after the completion of the said extra work.

## **2.14 Laws, notices, permits and fees**

The successful respondent shall obtain the necessary permits and pay the required fees as they pertain to this assignment, which are in force at the date of the proposal closing.

The successful respondent shall give the required notices and comply with the laws, ordinances, rules, regulations, codes and orders of the authorities having jurisdiction which are, or become, in force during the period for which services are performed in accordance with the schedule of work.

## **2.15 Cancellation**

- a) The Corporation reserves the right to immediately terminate the contract for sufficient cause, including but not limited to such items as non-performance, late deliveries, inferior quality, pricing problems, etc.
- b) Continued failure of the successful respondent to execute the work properly shall result in a termination of contract. The Corporation shall provide written notice of termination.
- c) The Corporation may elect to terminate the contract if the original terms and conditions are significantly changed, giving thirty (30) calendar days written notice to the successful respondent.
- d) Either party may terminate the contract by giving the other party sixty (60) calendar days written notice. A period of less than sixty (60) calendar days to terminate the contract may be negotiable if mutually agreeable among the parties involved in the contract.
- e) Failure to maintain the required documentation during the term of this contract may result in suspension of the work activities and/or cancellation of the contract.

## **2.16 Conflict of interest**

This proposal is made by the respondent without any connection, knowledge, comparison of figures or arrangement with any other person or persons making a

proposal for the same work and is in all respects fair and without collusion or fraud.

## **2.17 Proposal evaluation and qualification criteria**

An evaluation committee will evaluate each of the RFPs received in accordance with the evaluation criteria as set out in Section 4.0. The committee reserves the right to enter into further discussions in order to obtain information that will allow the committee to reach a decision with a respondent, and to waive irregularities and omissions if, in doing so, the best interest of the Corporation will be served.

The Corporation reserves the right to interview any, all or none of the respondents that submit a proposal to provide the evaluation team with additional insight into the respondent's ability to meet the requirements as requested in the RFP. The interviews would be conducted by the representatives of the evaluation committee, as soon as possible but preferably within two (2) weeks of the RFP close.

The Corporation reserves the right to negotiate the expense of services with the awarded respondent in order to reduce cost to meet budget requirements.

The Corporation reserves the right to negotiate with the awarded respondent to either expand or reduce the scope of the project to meet all requirements.

## **2.18 Contact**

All enquiries relative to the “**proposal and award process**” shall be directed to Genevieve Scharback, Director of Administration/Clerk, [gscharback@westgrey.com](mailto:gscharback@westgrey.com).

Respondents shall submit enquiries via e-mail.

Questions will be posted to the West Grey website as RFP addendum at: [www.westgrey.com](http://www.westgrey.com).

Inquiries must be received no later than 4 p.m. three (3) working days prior to the closing date of the RFP; otherwise, a response may not be provided.

## **Section 3.0 – Terms of reference**

### **3.1 Scope of work**

The Corporation is seeking proposals from competent and qualified vendors to provide Internet and Telephone Voting (ITV) services for the 2022 municipal school board elections with an option for the 2026 election. Proposals are also intended to apply to any by-elections, which may be held in the interim period between the 2022 and the 2026 municipal and school board elections.

Proponents are required to submit one (1) Proposal for an integrated solution that clearly demonstrates the seamless and full integration of the ITV systems for the purposes of Voters' List strike offs and for calculating final results that include ballots cast by internet and telephone.

### **3.2 Submitted proposal to be considered an offer**

The submission of a proposal to the Corporation shall be deemed to constitute an "offer" which may be accepted by the Corporation. Upon such acceptance the terms, conditions and specifications therein set forth shall be confirmed and binding upon the Corporation and the proponent. Upon acceptance of the proposal both parties hereby agree to do everything necessary to ensure that the terms of the agreement take effect.

## Section 4.0 – Background information/deliverables

### 4.1 Background information/deliverables

The Municipality of West Grey has a population of approximately 13,500 and is located in the County of Grey. It has a mix of industrial, commercial and residential sectors.

The Municipality's seven-member council is comprised of the Mayor, Deputy Mayor and five councillors, all of whom are elected at large. The Municipality is also responsible for the conduct of elections for school boards within our geographic boundaries as follows:

- Bluewater District School Board (English Public)
- Bruce-Grey Catholic District School Board (English Separate)
- Conseil Scolaire Catholique Providence (French Separate)
- Conseil Scolaire Viamonde (French Public)

In delivering the 2022 municipal and school board election, all decisions and action will be based on the requirements of the *Municipal Elections Act* and the following principles:

- The secrecy and confidentiality of individual votes are paramount;
- The election should be fair and non-biased;
- The election should be accessible to the voters;
- The integrity of the process should be maintained throughout the election;
- The results of the election reflect the votes cast; and
- Voters and candidates should be treated fairly and consistently.

There are approximately 11,000 eligible electors in the Municipality. Voter turnout in the 2018 election was 42.2%. The Municipality used internet and telephone voting in the 2018 municipal and school board elections. Voters were given the option of casting their ballot from their own electronic device or casting their ballot at a Help Centre using an electronic device provided by the Municipality. Help Centres rotated through various locations during the 10-day voting period.

The municipal council has authorized the use ITV again for 2022.

Both internet and telephone voting will be conducted throughout the entire voting period. Voting will begin 10 days in advance of Election Day at 10 a.m. on Friday, October 14 and will end at the closing of the polls at 8 p.m. on Election Day, Monday, October 24, 2022. During this voting period, Help Centres will be available daily, including periodically at the long-term care home.

## 4.2 Eligibility requirements

To be successful, the service provider must demonstrate expertise in the following areas, at a minimum:

- a) Ontario municipal experience delivering successful ITV elections, including by the Project Manager assigned to the Corporation; and
- b) System must integrate with DataFix Voter View including the Voter's List provided by DataFix, which is based on MPAC data. The integration must also allow for changes to the Voters' List following the election back to DataFix through Voter View.

## 4.3 Project requirements

A summary of the Corporation's requirements for an integrated ITV solution are as follows:

- a) Provide ITV during the entire voting period, which can be conducted on a computer, tablet or other mobile device or by telephone;
- b) Provide a solution that demonstrates full integration with the Corporation's voters' list management system, VoterView by DataFix;
- c) Detailed vendor support provided to the project, including but not limited to, appropriate training and technical support to Clerks Department and Information Technology staff; and
- d) Detailed plans for redundancies used to protect voter information and vote data from data loss in the event of hardware/software power failure.

Costs for the above listed tasks are to be included with the proposal.

## 4.4 Accessible customer services

All services provided for the delivery of ITV must comply with the *Municipal Elections Act* provisions regarding accessible elections, *Accessibility for Ontarians with Disabilities Act, 2005* and its associated regulations.

#### 4.5 Milestones

A draft schedule is provided below. The successful proponent shall be required to submit a detailed work plan and schedule reflecting project commencement in December 2021 and utilizing their professional judgement on the staggering of tasks.

Milestone/deliverable	Target date
Proposal award	December 2021
Project start-up meeting	December 2021

#### 4.6 Corporation responsibilities

The Corporation will provide the following to the successful proponent:

- Municipal and election logos and artwork;
- Municipal address and election contact information;
- Candidate names and pronunciations for each race; and
- Voting period information (dates and times, Help Centre locations).

## Section 5 - Technical components of proposal

### 5.1 Submissions requirements

The proposal shall include the following:

#### Part A: Fee proposal

- Completed Pricing Form outlining the upset fee for each proposed component of the project. The total fee will be considered the upset limit for the assignment. Upset limit means the maximum amount that will be paid by the Corporation to the proponent to complete the assignment irrespective of the time required to complete the assignment.
- The fee proposal shall include all disbursements necessary for the proponent to complete the assignment;
- The Corporation will pay for advertisements, any rental of rooms for public information meetings, as well as any fees charged by approval authorities.
- HST shall not be included in proposals.
- Disbursements, such as telephone, facsimile, printing, courier, travel, meals and environmental engineering, are to be included in the upset limits.
- Proponents shall clearly identify and include any costs believed not to be covered in this RFP, but considered necessary for completion of the assignment, and shall specifically identify them in the proposal.
- Payments to the proponent will be upon submission of invoices by the proponent to the Corporation in respect of completed project deliverables for the identified tasks.

#### Part B: Technical Proposal

- The proponent's qualifications, experience and resources to complete the proposed work.
- Completed Proponent's Ability and Experience Form outlining three (3) relevant and similar projects undertaken and successfully completed, including; initial cost estimate, final cost, completion date, final completion date and references.
- Identification of key project team members, demonstrating relevant experience and roles that will be assumed in the execution of the work.
- A project schedule demonstrating the time requirements and points of completion of the project's main tasks, sub-task and activities as defined in the detailed work plan, including milestone dates. The proponent must have a proven track record of delivering projects on schedule and on budget.
- Details of the proponent's Quality Assurance Plan for the project.
- The body of technical proposals should be limited to 5 pages including resumes and additional details on relevant company experience resources that may be attached.

## 5.2 Proponent's staff assigned to project

The successful proponent shall assign and dedicate a project manager for this undertaking. The project manager must always be available and assigned to this project. The person selected for this position shall not be changed or substituted without the approval of the Corporation. A list of all project staff, including; titles, their abilities, previous experience, and professional designation shall be provided.

## 5.3 Proponent overview, qualifications & project team

Proposals should include the following:

- Company history.
- Information technology infrastructure.
- Business structure to absorb additional customer base.
- Location(s).
- Personnel and description of the roles of team members.
- Identify team members who will be involved, the Project Manager who will be assigned to work with the Corporation, the number of people involved in each phase of the project.
- Demonstrate qualification of company.
- Demonstrate qualifications/experience of project team.

## 5.4 Project approach, implementation plan and support

- Describe proponent's approach to delivering ITV solutions.
- Detail resources that proponent will provide and those they will require including internal resources, third party consultants and sub-contractors. Provide role, level of effort (days). Identify whether substitutions in the proponent team will require notice to and approval by the municipal Clerk or designate. Identify whether Corporation staff will have access directly to all parties involved in the project including any third parties.
- Provide:
  - Detailed description of the implementation approach speaking to the expected scope of work required to implement the proposed solution. Include timelines; highlight details of the solution's developments; address testing, deployment, training, maintenance, support, disaster recovery and project wrap-up/data destruction. Describe all tasks and include resources, durations and milestones needed for full implementation. Identify whether there is a review process and meetings to measure progress at various stages of the project built into the implementation approach.
  - Detailed description of how proponent will work with the Corporation's voters' list management provider, DataFix, to ensure the migration to and from DataFix and storage of voter data. Demonstrate how the system will

merge/purge duplicate elector data to identify and eliminate duplicate electors from the system. Demonstrate how the system meets Canada Post requirements for postal incentives and mail accuracy through use of Canada Post approved address correction program.

- Detailed outline of how Voter Notification Letters will be prepared and provided to electors.
- Detailed outline of proponent support to the project, including but not limited to appropriate training and technical support to staff in the Clerk's Department and Information Technology.
- Information/Documentation/Media that demonstrates how the proponent's proposed solution works.
- Information on communication plans, community education/engagement plans.

## 5.5 Technology, functionality and security

- Technology - Advise on the technology employed including but not limited to:
  - Provide your technology service level agreement. It is expected to include service availability, service performance, guarantee up-time, and scalability to accommodate a surge in voting volume 24/7, etc.
  - Include details of client support availability and maximum response times for resolution of reported problems and inquiries.
  - The system must perform adequately for all clients, including those with relatively low bandwidth.
  - What is the technical support available for voters?
- Functionality - Advise on the functionality of the systems including but not limited to:
  - Administration process
  - Changing user authentication credentials (i.e. PIN)
  - Viewing/editing school support
  - Enabling/disabling authentication credentials
  - Flagging suspect authentication credentials
  - Adding/removing electors from voters' list
  - Real time access to voters' list showing who has voted
  - Options for involvement by scrutineers
  - Voting process
    - Voter verification of vote selection prior to submission
    - Voter confirmation of completion
    - Vote cast logging information
    - Voting option verification and control
    - Undervoting, overvoting, spoiling ballots
    - Interrupted voting sessions
    - Language options
  - Readability – ability for Corporation to work with proponent to craft instruction language; order of races; order of candidates, etc.

- Selection confirmation prior to completion of vote
  - Vote validation following completion of vote
  - Compliance with AODA requirements
  - Voter help options
  - Closing polls manually
  - Internet voting system process
    - User authentication process
    - Ability to step forward and back in voting process
    - Ability to interface with screen readers and other assistive devices
    - Readability - Text size, background colour, other options
  - Telephone voting system process
    - user authentication process
    - ability to repeat telephone scripts without looping
    - approximate time to complete
  - Auditing process
    - System audit logs
    - Auditor functions and capabilities
  - Reporting
    - Statistical reporting ability
  - Recount process
  - General ease of use
  - Customizability for Municipality of West Grey
- Security
    - Provide detailed overview of security options and features including but not limited to:
      - Ability to prevent automated systems from voting
      - Voting session interruption and completion
      - Privacy for public technology use
      - Session time out periods
      - Fraud and illegal manipulation detection/prevention
      - Validation process of election data after retention period

## 5.6 Value added items

- Description of any value-added items or services provided which are in addition to the deliverables outlined and are included in the proposed fee.

## Section 6 - Financial component of the proposal

### 6.1 Pricing form

Proponents are required to complete the Pricing Form attached to this RFP. The proposal shall be an upset cost estimate, which will not be exceeded without prior written approval by the Corporation, including all fees, sub-consultant fees and disbursements (total cost to be provided by proponent). The proponent shall be responsible for all project costs.

Price for services, expressed as cost per elector (and point/method at which elector count is set).

This price is for the 2022 Election, and by-elections between 2022 and 2026.

There is an option for the 2026 Election, to be mutually agreed upon prior to the 2026 election.

Price quoted in Canadian dollars, inclusive of duty where applicable, exclusive of HST.

## Section 7 – Proponent selection procedure

### 7.1 Evaluation

The Corporation will conduct the evaluation of proposals in the following stages:

#### Stage I – Evaluation

Stage I will consist of a review to evaluate each proposal based on the non-financial rated criteria as set out below:

<b>Criteria description</b>	<b>Weight Factor (%)</b>
Proponent overview, qualifications and project team	30
Project approach, implementation plan and support	30
Technology, functionality and security	35
Value added	5

Points are scored based on the following five-point scale:

- 1 Does not meet the requirements
- 2 Barely meets the requirements (significant reservations)
- 3 Somewhat meets the requirements/expectations (some reservations)
- 4 Meets the requirements/expectations
- 5 Exceeds requirements/expectations

#### Stage II – Pricing

Stage II will consist of a scoring of the submitted pricing of each qualified proposal. Each proposal will receive a percentage of the total possible points allocated to price by dividing the lowest proposal price by that proponent's price.

$(\text{Lowest proposal price}) / (\text{proponent's price}) \times 15 \text{ points} = \text{pricing score}$

The evaluation of the financial component will be undertaken after the evaluation of the technical requirements and rated criteria has been completed.

#### Stage III – Interviews (optional)

After the completion of Stage II, all scores from Stage I and II will be added together and the proponents will be ranked based on their total scores.

The Corporation may have, at a minimum, the two highest scoring proponents from the initial ranking attend an interview. This interview timing will be booked by the Corporation in discussions with the proponents.

Interviews / Demonstrations will be conducted remotely. The requirements for the product demonstration will be provided at the time of invitation. Proponents

will have a minimum of five (5) days' notice to prepare. The following is an overview of the categories and weighting for the evaluation of the interviews / demonstrations:

Description	Evaluation Weight
Presentation Articulating project approach and methodology <ul style="list-style-type: none"> <li>• Ability to articulate all facets of project</li> </ul>	50%
Interview <ul style="list-style-type: none"> <li>• Team interaction, knowledge of responsibilities</li> <li>• Ability to address project specific questions</li> </ul> Demonstrated project comprehension to accomplish objectives	50%

## 7.2 Schedule

The following schedule is proposed for the selection of the successful proponent for this project.

Activity	Date
Request for proposal issued Revised	October 26, 2021 November 22, 2021
Deadline for questions	December 5, 2021
Request for proposal closed	December 8, 2021 – 1:59:59 p.m. Local Time
Interviews (if required)	December 9 or 10, 2021
Selection of successful proponent	Week of December 13, 2021

Although every attempt will be made to meet all dates, the Corporation reserves the right to modify any or all dates at its sole discretion.

**Proposal Form**

For the Provision of: 2022 Municipal Elections Internet and Telephone Voting Services

As Supplied by: \_\_\_\_\_  
Firm Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
City, Province and Postal Code

**Hereinafter Called the Proponent**

To: The Corporation of the Municipality of West Grey  
402813 Grey Rd. 4  
R.R. 2, Durham, ON N0G 1R0

**Hereinafter Called the Corporation**

The Proponent Declares

1. No person(s), firm or Corporation, other than the Proponent, has any personal interest in this RFP or in the award for which this RFP is made;
2. No member of council, no officer or employee of the Corporation is or will become interested directly or indirectly as a contracting party, partner, shareholder, surety or in any portion of the profits thereof, or in any of the monies to be derived, therefrom;
3. This RFP is made without any connection, comparison of figures, or arrangements with, or knowledge of any other Corporation, firm or person making a Tender for the same and is in all respects without collusion or fraud;
4. By signing this submission, I confirm I have read and understood the content and requirements of this RFP document;

**Acknowledgement to receipt of Addenda**

This will acknowledge receipt of the following addenda and that the pricing quoted includes the provision set out in such addenda;

<b>Addendum #</b>	<b>Date Received</b>
# _____	_____
# _____	_____

**Check here if NO Addenda received**

Print name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_, 2021

By my signature, I hereby confirm I am a principal, or have been duly authorized by the principal/board, to sign on behalf of the above named.

**Proponent Information Form**

Proponents must complete this form to register for this RFP. Please ensure all information is legible.

1.	Name of the proponent	
2.	Proponent's contact individual	
3.	Office phone #	
4.	Mobile #	
5.	Email address	
6.	WSIB account # (if applicable)	
7.	HST account #	

Print name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_, 2021

### Proponent's Ability and Experience Form

Proponents shall provide information below on contracts in this class of work that have been successfully undertaken by the proponent's firm in the past five years.

<b>Contract #1</b>	<b>Insert Information</b>
Reference name	
Contact & telephone #	
Contract type/name and term	
Total value (annual)	
Description of work	
Additional comments (optional)	
<hr/>	
<b>Contract #2</b>	
Reference name	
Contact & telephone #	
Contract type/name and term	
Total value (annual)	
Description of work	
Additional comments (optional)	
<hr/>	
<b>Contract #3</b>	
Reference name	
Contact & telephone #	
Contract type/name and term	
Total value (annual)	
Description of work	
Additional comments (optional)	

Print name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_, 2021



### Pricing Form

Included in the bid price for all items shall be all associated disbursements and any other activity relating to the completion of the assignment.

Item	Price submitted (excl. taxes)
Price for services, expressed as cost per elector (and point/method at which elector count is set).  Includes: price for the 2022 Election, and by-elections between 2022 and 2026.	

Print name \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_, 2021