



## Staff Report

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<b>Report To:</b>	<b>Council</b>		
<b>Date of Meeting:</b>	May 25, 2021	<b>Report Number:</b>	FSD-028-21
<b>Submitted By:</b>	Trevor Pinn, Director of Financial Services/Treasurer		
<b>Reviewed By:</b>	Andrew C. Allison, CAO	<b>Resolution#:</b>	
<b>File Number:</b>	[If applicable, enter File Number]	<b>By-law Number:</b>	
<b>Report Subject:</b>	RFP2021-4 Centralized Customer Service Review Consulting		

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### Recommendations:

1. That Report FSD-028-21 be received;
2. That CSPN with a bid amount of \$128,039.52 (Net HST) providing the lowest overall cost and meeting the passing threshold and all terms, conditions and specifications of RFP2021-4, be awarded the contract for the provision of Consulting Services as required to complete the Centralized Customer Service Review for the Office of the Chief Administrative Officer;
3. That the funds required for this project in the amount of \$128,039.52 (Net HST) be funded by the grant received from the Provincial Government; and
4. That all interested parties listed in Report FSD-028-21 and any delegations be advised of Council's decision.

## Report Overview

To request authorization from Council to award RFP2021-4 Centralized Customer Service Review Consulting.

### 1. Background

- 1.1 The Municipality requires the assistance of a qualified consulting firm to conduct a Centralized Customer Service Review. The outcome of the Review will include a clear breakdown of the current state of the Municipality's customer service approach across the organization. It will also provide future recommendations for both structural and operational improvements to increase customer value when interacting with the Municipality.
- 1.2 The scope of work for this Request for Proposal (RFP) was prepared by the Office of the CAO and provided to the Purchasing Services Division.
- 1.3 The RFP allowed the Municipality to select a qualified consultant with the skills, resources and experience necessary to provide services for the project. The RFP was structured on the price-based two-envelope RFP system with an award going to the proponent passing the stipulated threshold and having the lowest price.
- 1.4 RFP2021-4 was issued by the Purchasing Services Division and advertised electronically on the Municipality's website. Notification of the availability of the document was also posted on the Ontario Public Buyer's Association website.

### 2. Analysis

- 2.1 Nineteen plan takers downloaded the RFP document.
- 2.2 The RFP closed on April 30, 2021.
- 2.3 Six proposals were received by the stipulated closing date and time.
- 2.4 Of the 13 firms that downloaded the RFP document but chose not to submit a proposal:
  - Three companies advised they could not meet the submission deadline;
  - One company advised that they were reluctant to provide the requested financial requirements within the RFP;
  - One company did not have the capacity and capability to support the bid at this time;

- One company was a public opinion research company;
  - One company did not meet the qualifications as they had not worked for a Municipality in the past; and,
  - Six companies did not respond to the Municipality's request for information.
- 2.5 The Purchasing Services Division reviewed all submissions received, and all met the mandatory requirements to move forward to phase one of the evaluation process.
- 2.6 The RFP stipulated among other things, that bidders were to provide a description of Firm/Consulting team, key qualifications, firm profile, highlights of past service and experience of team members with projects of similar size, nature and complexity and a demonstrated understanding of the Municipality's requirements and their approach to meeting the requirements contained within the RFP document.
- 2.7 Each submission consisted of a comprehensive proposal identifying:
- Qualifications and experience;
  - Experience of the proponent with projects of similar nature, size and complexity;
  - The proposed team who would be working with the Municipality;
  - The proponent's understanding and approach to complete the project;
  - Key project challenges and demonstrating that the Proponent has adequate resources and an appropriate strategy for addressing the challenges.
  - The proposed tasks and timelines; and
  - Identification of accessibility criteria.
- 2.8 The submissions were reviewed and scored in accordance with the established criteria outlined in the RFP by an evaluation team consisting of staff from the Office of the CAO and the Community Services Department. Submission evaluation criteria included:
- Allocated roles and responsibilities of the proposed team members;
  - Proposed approach to completing the project;
  - Proposed timelines to complete the tasks required;
  - Highlights of services provided within the past five years only; and
  - The proponent's understanding of the Municipality's requirements, the project and any related issues or concerns.
- 2.9 Upon completion of the evaluation, the evaluation committee concluded that the following four proponents met the pre-established passing threshold of 80% for phase one and moved on to the second phase of the process:

- CSPN;
- KPMG LLP;
- MNP; and
- Optimus

- 2.10 The evaluation committee deemed that presentations from the proponents who made it to phase two were not required, and their pricing envelopes were opened and evaluated. The submission from CSPN had the lowest overall bid.
- 2.11 CSPN has not worked for the Municipality in the past. However, staff completed a reference check, which was satisfactory.

### **3. Financial**

- 3.1 The Municipality applied for grant funding from the Provincial Government and will receive the approved funding required to conduct the Centralized Customer Service Review. The grant provides funding for 100 per cent of the costs related to the project; there is no Municipal contribution required.
- 3.2 The total funds required for this project in the amount of \$128,039.52 (Net HST) is within the approved grant amount.

### **4. Concurrence**

Not Applicable.

### **5. Conclusion**

It is respectfully recommended that CSPN having the lowest overall cost and meeting all terms, conditions and specifications of RFP2021-4 be awarded the contract for the provision of consulting services for the Centralized Customer Service Review as required by the Municipality.

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Staff Contact: David Ferguson, Purchasing Manager, 905-623-3379 ext. 2209 or [dferguson@clarington.net](mailto:dferguson@clarington.net).

Attachments:

Attachment 1 – Summary of Proposals Received

Interested Parties:

List of Interested Parties available from Department.

**Municipality of Clarington**  
**Summary of Proposals Received**

**RFP2021-4**

**Centralized Customer Service Review Consulting**

<b>Bidder</b>
Blackline Consulting
Consilium Public Sector Services Inc.
CSPN*
KPMG LLP*
MNP*
Optimus*

Note: Bidders with an asterisk (\*) are the companies who were shortlisted.