

Request for Quotation (RFQ)

Canadian Network of Asset Managers

Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4



1. About CNAM

CNAM is the association of public infrastructure asset management in Canada. Our government and private sector members develop policies, tools and technologies which improve the levels of service delivery through public infrastructure assets in every Province and Territory in Canada. CNAM shares that knowledge with other members and stakeholders through our online resources, the Annual Conference and various committees, programming and events.

2. Background

CNAM is planning to respond to the Municipal Asset Management Program 4 (MAMP 4) Call for Applications (CFA), which is administered by the Federation of Canadian Municipalities (FCM) and funded by Infrastructure Canada. CNAM is seeking information from Respondents with respect to their qualifications to deliver all or a portion of the items outlined in the Scope of Services Overview below.

3. Scope of Services

Please note that the information requested through this RFQ process will result in the selection of Respondents for each scope of services below. Upon notification of award, selected Respondents will be required to submit a detailed work plan and budget for each scope they were selected for. This will be a key input to the overall submission to FCM's Call for Applications due Nov. 3, 2021. See schedule or more information.

a. Program Management

CNAM is seeking a Program Manager for its MAMP 4 Program. The Program Manager will be responsible for liaising with the MAMP 4 Steering Committee (a sub-committee of the CNAM Board), development and delivery of all deliverables in the MAMP 4 Program, day-to-day management of the Program and the required operational reporting to FCM throughout the duration of the Program.

b. Marketing and Communications

Marketing and communications efforts may be supported by a subcontractor to MAMP, which would supplement our existing marketing and communications resources.

c. CNAM MAMP 4 Program Delivery

CNAM is seeking Program Service Providers for its MAMP 4 Program. Service Providers will develop and deliver programs under one or more of the Topics listed below.

Respondents are requested to submit a response to any or all of the following program Topics:

Request for Quotation (RFQ)

Canadian Network of Asset Managers



Canadian Network
of Asset Managers

Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4

- (1) CNAM Asset Management 201 and 301 Education Series.
- (2) Operationalization of Climate Change in the context of Asset Management.
- (3) An Asset Management Onboarding Tool for Small Communities.

The Topics are detailed further below:

C1: CNAM Asset Management 201 and 301 Education Series

CNAM, as part of its previous education and training efforts has created an Asset Management 101 booklet. This program, under MAMP4, is intended to build on that foundation and produce next level and advanced level asset management education and training materials called CNAM Asset Management 201 and CNAM Asset Management 301 Series. The successful Respondent is expected to develop innovative and engaging training materials and delivery program in suitable formats for online delivery. The proposed program shall include the following key elements:

- Cohort consultation on AM 201 and AM 301;
 - Training syllabus (content)
 - Training structure and format
 - Delivery platform
- Cohort consultation on development of AM 201
- Cohort consultation on development of AM 301
- Cohort testing of AM 201 training
- Cohort testing of AM 301 training
- Finalization and roll-out of AM 201 and AM 301

C2: Operationalization of Climate Change in the context of asset management

Many organizations have completed studies or assessments regarding the potential impacts of climate change but are struggling with the next steps to use this information. This program, under MAMP4, is intended to develop a methodology, guidance notes, and case studies related to operationalization of Climate Change in the context of asset management. The program will identify practical ways to use the knowledge from climate change studies in asset management decision-making, levels of service, prioritization, budgeting, risk assessments, asset lifecycle strategies, and financial forecasts, to make their communities more sustainable. The proposed program shall include the following key elements:

- Cohort group learning and problem solving.
 - Each participating community will bring at least 1 climate change artifact (study, assessment, report) that they wish to “operationalize” for their organization.
- Facilitation and expert advice.
 - Participants will problem solve to assist each other to develop an operationalization plan for their climate change artifact.
 - Expert advice will be provided to assist participants in the detail for the operationalization plans. However, the facilitation of these sessions will focus on participants learning by doing.
- Knowledge sharing beyond the program.

Request for Quotation (RFQ)

Canadian Network of Asset Managers



Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4

- Cohort groups and facilitation sessions will be designed to build a support network among participants that can continue beyond the program.
- Development and publication of relevant knowledge materials such as a guide and working templates for operationalization of climate change artifacts through asset management.
- Development and publication of case studies from the operationalization plans developed in the cohort sessions.

C3: Asset Onboarding Tool

Municipalities and similar organizations of all sizes have traditionally struggled to obtain relevant asset information for newly constructed assets, in sufficient detail and appropriate formats. This program, under MAMP4, is intended to develop a digital Asset Onboarding Tool (AOT). This tool may be a simple excel sheet tool or preferably a web-based solution. The tool would be used by an organization, especially a smaller municipality, to capture asset details at the end of a capital project regardless of whether the project is completed by internal or external resources. Requirement to use the tool and record necessary asset information can be included in contracts, agreements, or development approvals to be completed prior to the organization taking responsibility for the assets. The proposed program shall include the following key elements:

- Ease of Use.
 - The tool must be easy to use and easy to configure to the different needs of an organization regarding what data is recorded and what format it is recorded in.
 - A user guide for the tool must be provided
- Comprehensive.
 - The asset information recorded in the tool must allow for easy upload of relevant asset data into the asset register of the organization. It must also record the detail and frequency of routine, periodic, and cyclical operations, maintenance, and inspection tasks to be done on the asset throughout its lifespan.
- Proven.
 - Volunteer organizations shall be sought to test run the tool and complete a feedback form and provide a user rating for the tool.

4. Program Deliverables

The following deliverables will be considered part of the scope of work.

4.1 Inputs to CNAM's Submission to FCM Call for Applications

- Prepare proposal content ("the proposal") for CNAM's overall submission to the CFA, for the selected scope(s).
- The key deliverables required will include a work plan and budget for each Topic input into the defined template (requirements and work plan / budget template provided upon award).
- The proposal shall clearly articulate the program objectives, methodology, details of materials related to education and others, instruction methods if applicable, technology including platforms. Innovation, Quality, and Objective will be critical.

Request for Quotation (RFQ)

Canadian Network of Asset Managers



Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4

- The proposal shall indicate how the program will be executed and identify and detail administration efforts and performance evaluation of the program(s).
- The proposal to be written as part of a CNAM proposal submission package to FCM and thus must confine to the requirements set out by CNAM and FCM.
- The knowledge and supporting materials developed will be owned and considered the intellectual property of CNAM, and the material and systems developed must reflect this. This must align to any contractual requirements between CNAM and FCM on use, licensing and accessibility of MAMP deliverables.

4.2 Execution of Program Delivery

- The subcontractor will solely execute the program(s) and all of its/their elements; CNAM will provide guidance as necessary.
- CNAM has a MAMP Steering Committee that will provide direction and advice to the subcontractors, along with CNAM's Executive Director.
- The Program Manager will manage the overall program and coordinate all other subcontractors through program delivery.
- The subcontractor will administer the program(s) including completing administrative material – from FCM, CNAM, and other – and ensure timely billing for the efforts are completed on standard templates complying CNAM and FCM requirements.
- The subcontractor will maintain utmost professional conduct in delivering the services to FCM, CNAM, and program participants, and will act as an ambassador and representative for CNAM throughout program delivery.

4.3 Handover

- The subcontractor will hand over all materials and systems developed as part of the program(s) to CNAM at the end of their component of program delivery.

5. MAMP 4 Requirements and Other Matters

5.1 Disclosure of Information

- The Respondent acknowledges that any information provided in this RFQ, even if it is identified as being supplied in confidence, may be disclosed by CNAM where required by law, or if required by an Order of a court. The Respondent consents to this disclosure on a confidential basis.
- Similarly, CNAM acknowledges that any information provided in this RFQ, even if identified as being provided in confidence, may be disclosed by the Respondent where required by law, or if required by an Order of the court. CNAM consents to this disclosure on a confidential basis.

5.2 Conflicts of Interest

- Please declare all potential Conflicts of Interest pertaining to this RFQ – state “YES” or “NO”.

Request for Quotation (RFQ)
Canadian Network of Asset Managers



Canadian Network
of Asset Managers

Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4

- By selecting “NO”, you will be deemed to declare that (a) there was no Conflict of Interest in the preparation of the response to the RFQ; and (b) there would be no foreseeable Conflict of Interest in performing any of the obligations contemplated in the RFQ.
- By selecting “YES”, you declare that there is an actual or potential Conflict of Interest relating to the preparation of the response to the RFQ, and/or you foresee an actual or potential Conflict of Interest in performing any of the obligations contemplated in the RFQ. Please provide details.

5.3 FCM Requirements

- By responding to CNAM's RFQ, you agree to work within the requirements set by FCM and agreed upon by CNAM.
- Respondents understand that in accordance with the announced timing included in FCM's MAMP 4 Call For Applications timetable, and the related timing of FCM's expenditure reimbursement schedule in the MAMP 4 Grant Agreement, that payment by CNAM of the of the successful Respondent's first invoice under this RFQ is estimated to be in August 2022.

5.4 Cost of RFQ Responses and FCM Proposal Submission

- Any expenditures incurred to submit a response to this RFQ, or additional information requested on work plan and budget, will not be reimbursed and are the responsibility of the Respondent. These costs are ineligible under the FCM agreement.
- Please note that the work plan and budget will only be requested upon notification of award, and as such not all Respondents will need to bear the cost of preparing this.

6. Schedule

The following schedule has been established to provide guidance to Respondents:

September 30	Public release of the CNAM RFQ document
October 4	Release of this RFQ
October 13 at 11:59 PM (ET)	Deadline for inquiries
October 15 at 11:59 PM (ET)	RFQ Respondents' submission deadline to CNAM
October 18-21	Evaluation and clarification period <i>(Respondents may be contacted for information during this time period).</i>
October 22	Notification of award and contract(s) issued.

Successful Respondents should expect to also participate in the following:

October 22 (or earlier)	Distribution of MAMP 4 Budget and Activity Description Template
October 26	Completion of Budget and Activity templates to CNAM Proposal Writer

Request for Quotation (RFQ)

Canadian Network of Asset Managers

Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4



	Successful Respondent(s) prepares submission to be included in CNAM's application to the MAMP 4 CFA (guided by Proposal Writer/Coordinator and CNAM Executive Director)
October 27–November 2	CNAM's MAMP 4 CFA response coordinated and completed
November 3 at 11:59 PM (ET)	CNAM submits response to FCM's MAMP 4 CFA
November 3 onwards	Follow-up to CFA response as required by FCM

7. Contact Person

All inquiries for this RFQ can be directed with attention to Doug Cutts through admin@cnam.ca. Please note that any inquiries, formal or informal, through other individuals or mechanisms may disqualify Respondents.

All inquiries will be directed back to Mr. Cutts and all responses distributed to all interested Respondents. Please register with admin@cnam.ca as an interested Respondent to ensure you receive the Q&A.

8. Respondent Information

Please provide the following information in support of your response to the RFQ:

1. General Contact Information
 - Provide name of firm, office address, telephone number, website, and name and email address of primary contact.
 - Declaration of Conflict of Interest (if applicable)
2. Experience and Qualifications
 - Include project and program management skills and credentials, including quality control processes.
 - Experience with previous MAMP Programs
 - Online capabilities for training.
 - Experience working with other Not-for-Profit organizations.
 - Provide up to two applicable reference(s) for each scope area selected.
3. Key Personnel
 - Individuals that would be assigned to the project including a short biography.
 - Project organizational chart.
 - Resumes of key personnel.
4. Include any Sub Contractor personnel to be retained for the Project
 - Description of the merits of their participation, and a description of their qualifications.
 - Resumes of Sub Contractor key personnel.

Request for Quotation (RFQ)

Canadian Network of Asset Managers

Program Delivery for CNAM's Municipal Asset Management Program (MAMP) 4



Canadian Network
of Asset Managers

5. Scope of Services

- Indicate which scope(s) of services you will be submitting for.

6. Pricing Information

- At minimum: Hourly rates for all personnel resources. Proportion of resource hours by person (*e.g. Team Lead x%, Analyst y%*). We will be estimating a blended rate for the overall team. Availability of all proposed personnel for the time period of MAMP 4.
- If possible (but not required, due to short time frame): indicate details by providing key tasks, hours budgeted and costs. Indicate any expected disbursements. If provided, this would be considered non-binding and will be refined in development of CNAM's submission to FCM's CFA before Nov. 3.

Please note that a work plan and budget will be required to be submitted in the week following award, in the required FCM format.

Enclosed: FCM MAMP 4 Call for Application Documents