



REQUEST FOR PROPOSAL FINANCIAL SUPPORT FOR

RESTRUCTURING STUDY

RFP-2025-003ADMIN

Deadline for Submission:
August 15, 2025, 12:00 p.m.

All inquiries regarding this RFP shall be directed to

Caitlin Haggart, Clerk Administrator at
705-3854-5819 ext. 207
by email: clerk@strongtownship.com
Township of Strong
28 Municipal Lane, Sundridge, ON P0A 1Z0

Nancy Millar, Clerk Administrator
at 705-384-5316
By email: clerk@sundridge.ca
Village of Sundridge
110 Main Street, Sundridge, ON P0A 1Z0

Jennifer Martin, Municipal Administrator (Clerk)
At 705-384-5428
By email: municipal.admin@townshipofjoly.com
Township of Joly
871 Forest Lake Road, Sundridge, ON P0A 1Z0

The SSJ Restructuring Committee reserves the right to reject any or all proposals.
The lowest cost or any proposal will not necessarily be accepted.

REQUEST FOR PROPOSAL

FINANCIAL SUPPORT FOR RESTRUCTURING STUDY

The Township of Strong, Village of Sundridge and Township of Joly (SSJ) are exploring the potential benefits and challenges of amalgamating into one municipality. This initiative aims to examine whether combining resources, governance, and services could lead to better efficiency, improved services, and long-term sustainability for all three communities. Following the Phase 1 public engagement in January 2025, preliminary findings highlight six key areas requiring detailed financial analysis. The SSJ Restructuring Committee seeks a qualified Financial Consultant (or firm) to support answering Questions 3, 7, 8, 9, 20, and 21, which were identified by the public. Proposals shall be submitted by email to clerk@strongtownship.com, clerk@sundridge.ca, and municipal.admin@townshipofjoly.com on August 15, 2025, 12:00 p.m.

BACKGROUND INFORMATION

The Township of Strong is a single tier municipality located in the District of Parry Sound and is characterized by several very small urban settlements and a significant amount of both waterfront and rural areas, predominantly understood to be “cottage country.” The permanent population of the Township is approximately 1,500 persons; however, the seasonal residents in the municipality is approximately 3,500. All residents have private sewer and water.

Sitting on the shores of Lake Bernard, Sundridge is a Village located in the District of Parry Sound, between Huntsville and North Bay with a population of approximately 961 permanent residents. Sundridge is a tourist destination in both Summer and Winter and has long been known as the “Pearl of the North.” A majority of residents have access to municipal sanitary sewer services, and curbside garbage pickup.

The Township of Joly was incorporated in 1890 and is located within the picturesque Almaguin Highlands in the District of Parry Sound, with a population of approximately 300 people. 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. All residents have private sewer and water.

The three municipalities currently have various types of shared service agreements for the Fire Department, Medical Centre, Arena, Landfill, Economic Development, Roads, Library (under their own Board) and Recreation. Each municipality contracts out various services such as municipal planning, Integrity Commissioner, legal and auditor services.

For more information on the restructuring process to date, please visit <https://www.strongtownship.com/news/posts/amalgamation/>

SCOPE OF WORK

The municipalities of Sundridge, Strong, and Joly (SSJ) hosted a Phase 1 public engagement in January 2025, which was facilitated by J. Ball Consulting Inc. The preliminary findings of this session and online survey, highlight six key areas requiring detailed financial analysis. Within these six key areas, there were thirty one questions consolidated from the feedback collected from the public. The SSJ Restructuring Committee seeks a qualified Financial Consultant (or firm) to support answering Questions 3, 7, 8, 9, 20, and 21.

For each of the following six questions, deliver an in-depth analysis:

1. **Q3 – Will amalgamation lead to lower costs for residents? If so, how?**
 - Provide long-term cost modelling under current vs. amalgamated structure.
 - Identify one-time transition costs and ongoing synergies.
2. **Q7 – Will amalgamation increase my property taxes? If so, by how much?**
 - Model tax-rate scenarios under different amalgamation models.
 - Analyze phase-in approaches and inter-municipal equity.
3. **Q8 – How will municipal debt and assets be distributed among the three municipalities?**
 - How would each municipality's existing debt and assets be distributed in a merged entity?
 - Provide equitable and fiscally sound distribution models.
4. **Q9 – Will there be any cost savings from amalgamation? If so, where will these savings come from?**
 - Are there cost savings from amalgamation?
 - Identify specific categories (i.e. admin, procurement, IT), quantify annual savings
5. **Q20 – Will existing municipal staff lose their jobs as a result of amalgamation?**
 - Audit current staffing for redundancies
 - Analyze overlap, proposed transition plans and cost implications
6. **Q21 – Will services improve, decline or stay the same?**

- Compare services standards and recommend harmonization strategies using the completed Service Delivery Review (2021) and review of current shared services and contracted services.

Deliverables:

- Written report answering each question, with appendices (financial models, assumptions, data sources), submitted in PDF and Microsoft Word versions by email.
- Summary slide deck with visuals / infographics, submitted by PDF and Microsoft PowerPoint versions by email.
- Presentation to SSJ Restructuring Committee and Council(s), either virtually or in person.

MUNICIPAL RESOURCES

Each municipality employs an experienced Clerk Administrator and Treasurer/Deputy Treasurer who will provide all required documents and information.

Proponents must demonstrate past experience in financial expertise that for small, rural and recreationally focused lakeside municipalities. Consulting firms must identify one individual as the responsible direct contact for the purposes of contacting the above noted staff.

ADMINISTRATIVE REQUIREMENTS AND CONSIDERATIONS

Closing Date and Time

Proposals shall be submitted prior to or by August 15, 2025 at 12:00 p.m. All proposals received after the specified closing time will not be considered. There will be no public opening for this RFP.

Proposals must be received on or before the stated closing date and time.

Municipal Contact

Prior to submitting a Proposal, read the entire RFP document, including the Terms and Conditions, all appendices, any other documentation supplied by the Township for information purposes.

Any questions or concerns arising out of this RFP should be submitted via email to:

Caitlin Haggart, Clerk Administrator (Strong)

Email: clerk@strongtownship.com

Tel: (705) 384-5819 ext. 207

Nancy Millar, Clerk Administrator (Sundridge)
Email: clerk@sundridge.ca
Tel: (705) 384-5316

Jennifer Martin, Municipal Administrator-Clerk (Joly)
Email: municipal.admin@townshipofjoly.com
Tel: (705) 384-5428

TERMS AND CONDITIONS

Acceptance

The submission of a Proposal(s) indicates acceptance by the Proponent of the instructions, terms, conditions, and requirements or other information as set out in this RFP. Any variations from this information must be submitted in writing with the completed Proposal.

Proponent's Minimum Qualifications

Proponents shall demonstrate that they have the resources and capability to provide the materials and services as described herein:

1. Consultant Profile & Experience

- Demonstrated experience in municipal amalgamations or inter-municipal reorganizations.
- Team composition and roles.

2. Approach & Methodology

- Data acquisition strategies, modeling frameworks, stakeholder consultation plans.

3. Project Plan & Timeline

- Key milestones: data collection, interim findings, draft delivery, final report, presentations.
- Proposed start date and full timeline.

4. Fee Proposal

- Itemized cost structure (e.g., report, models, presentations).
- Travel and ancillary costs, if relevant.

5. References

- At least three comparable engagements (contact name, municipality, scope, dates).

Municipal Information Waiver

All information contained in this document and any potential subsequent addenda, with respect to operations, qualities, values, description of properties, losses etc., are reasonably and realistically accurate to the best of the municipalities' knowledge however, accuracy is not guaranteed by the municipalities.

Expenses Incurred

Submissions are made at the sole expense of the Proponent and the municipalities take no responsibility for any expense incurred by a Proponent in preparing or submitting its proposal.

Conflict of Interest

Proponents must ensure that they are not in a position that may be perceived as a conflict of interest.

Legal Proceedings with the Municipality

No Proposal will be accepted from any Proponent which has a claim or has instituted a legal proceeding against the municipalities or against whom the municipalities has a claim or instituted a legal proceeding with respect to any previous contract, bid submission or business transactions.

Rights Reserved

The following are rights reserved by the municipalities:

- This request does not commit the municipalities to award a contract.
 - The municipalities shall not be liable for any expense, loss or damage incurred or suffered by any proponent as a result of a non-award of this proposal call.
 - The municipalities reserve the right to ultimately select, in their own best judgment, and at its sole discretion the firm it deems best qualified to carry out this agreement. Determination will be final and not open to review or challenge, whether it is alleged that the selection is arbitrary or otherwise not in accordance with standard trade practice.
 - The municipalities reserve the right to cancel, terminate or withdraw this Proposal call at any time or to accept or reject all or any part of any Proposal.
 - The municipalities reserve the right to retain all Proposals submitted and to employ any concepts contained in a Proposal regardless of whether or not that
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- Proposal is selected.
- The proposal with the lowest cost will not necessarily be accepted.
- The municipalities reserve the right to enter into further discussions in order to obtain information that will allow them to reach a decision with a Proponent, and to waive irregularities and omissions if, in doing so, the best interest of the municipality will be served.

EVALUATION PROCESS

Responses to this Request for Proposal will be evaluated and short list of proponents may be invited to make a brief presentation or attend an interview.

Evaluation Criteria

In recognition of the importance of the procedure by which a Proponent may be selected, the following criteria outlines the primary considerations to be used in the evaluation and consequent awarding of this contract (not in any particular order). Evaluation of Proposals will include but not be limited to the following:

- Relevant Experience
- Quality of Methodology
- Timeline feasibility
- References
- Fees

The weighting of criterion will be as follows:

Qualifications and Experience	30
Methodology	25
Timeline	15
Fee Proposal	20
References	10
Total	100

Presentation

An award may be made solely on the basis of the proposal received, without the municipalities seeking any clarification, meeting or presentation by the Proponent. Therefore, each Proposal should contain the Proponent's best terms/information, including all required documentation and information as listed in the RFP.

A presentation may be requested. No other Proponent is entitled to be present or to

receive any information regarding the presentation of any Proponent. Representatives of the Proponent(s) invited to make a presentation shall be fully versed on the contents of the RFP and the Proponent's Proposal.

SUBMISSIONS INSTRUCTIONS

Closing Time and Date

Proposals must be received no later than **12 p.m. on August 15, 2025.**

Proposals should be sent via email to clerk@strongtownship.com, clerk@sundridge.ca and municipal.admin@townshipofjoly.com with a subject line "RFP 2025-003 ADMIN"

A Proposal received after the closing time shall be noted and rejected.

Key Dates

The municipalities will conduct the RFP process according to the following dates. These dates are tentative and subject to change.

Task	Target Date
Issue RFP	July 24, 2025
Final Date for release of any Addenda	August 8, 2025
Response to proponents questions	August 8, 2025
RFP Close	August 15, 2025
Anticipated Committee approval and award of contract	August 25, 2025
Project Completion Date	December 2025

Freedom of Information and Protection of Privacy Act

The municipalities are required by law to adhere to the requirements of the *Freedom of Information and Protection of Privacy Act*, as amended. Any Proponent who requires that the information in its Proposal be kept confidential shall explicitly advise the municipalities of that fact by stamping or boldly marking the information as "**CONFIDENTIAL.**" Release of any information not marked as confidential will be in compliance with the municipalities' policies and procedures. Proposal results may be reported to Council and the reports are released for public information.

Confidentiality

The consultant shall treat all information obtained during the course of this engagement—including but not limited to financial records, staffing data, infrastructure

assessments, and inter-municipal communications—as strictly confidential.

No information may be disclosed to third parties without prior written consent from the SSJ Restructuring Committee.

Any data shared will remain the property of the respective municipalities and must be returned or securely deleted upon completion of the engagement.

A formal confidentiality agreement must be signed prior to the start of any data collection.

Breach of confidentiality will be considered grounds for immediate termination of contract and may be subject to legal action.

Request to withdraw a proposal submitted

Requests for withdrawal of a Proposal shall be allowed if the request is made prior to the closing date and time. Requests shall be directed to the Municipal contact by letter or email, by an Authorized Agent of the company, with a signed withdrawal request confirming the details. Telephone requests will not be considered. The withdrawal of a Proposal does not disqualify a Proponent from submitting another Proposal on the same RFP.

Adjustment to a proposal

Adjustments by telephone, fax, email or letter to a submitted Proposal will not be considered. A Proponent desiring to make adjustments to a Proposal shall withdraw the Proposal and/or supersede it with a later Proposal submission prior to the specified Proposal closing date and time.

Submission of more than one proposal package

- If two (2) or more Proposals are received for the same RFP in different emails, the email with the latest time and date received shall be considered the intended Proposal.

Receiving

Once received, all Proposals will become the property of the SSJ Restructuring Committee.

Content Requirements

General Requirements

Your Proposal must:

- Contain signed copies of any and all addenda that have been issued
- Include a signed Statement of Acceptance, attached as Appendix A
- Include responses to all requirements noted
- Maximum length of Proposal shall not be larger than 50 pages
- Be signed

Proposal Clarity / Presentation

Proposals must be clear, well ordered, detailed and concise. The Proponent is therefore requested to provide detailed timelines and functional information.

The Proponent is requested to respond to each and every aspect of the RFP's objectives, expectations, specifications, schedules and requirements to allow for fair evaluation of the Proposal submissions.

Fee Breakdown

The Proponent's submission shall include:

- Overall project cost exclusive of HST.
- A detailed cost and time breakdown of each major activity identified in the proposal.
- Estimated time and cost breakdown for each team member.
- Identifying any disbursements and the associated costs.
- A fee schedule and hourly rates for all project team members.

The Proponent shall provide a firm quotation for the hourly fees charged for each type of service and category of employee. All fees should be quoted excluding Harmonized Sales Tax (HST).

One time fees should be identified separately. Out of pocket expenses should be clearly stated to be part of the quoted hourly fee or should be quoted separately.

Corporate Profile

Provide a brief profile of your firm indicating the scope of its practice and the range of activities performed by the firm. Clearly identify the Proponent's contact person for this RFP, with phone number and email address. State the home office address as well as the address and phone number of any local office that will manage or assist in managing the services.

Qualification & Experience

Provide a list of current Ontario Municipal clients and indicate the number of years your firm has been working with each. Describe your familiarity and experience.

Staffing

Provide the names and brief resumes of the partner(s), manager(s) and other key staff who would be assigned to the project.

References

The Proponent is to provide a minimum of three (3) municipal references that can be contacted, where programs of a similar scope/magnitude are in progress or have been completed within the last three years.

Implementation

Proposals must clearly show the firm's understanding of the work to be performed, approach, and commitment to perform the work within the time period agreed to. This would include the approach to be used to gain an understanding of the municipality's structure, shared services, financials, etc.

Procedures

The Successful Proponent shall not comply with requests and/or orders issued by any individual other than the Clerk Administrator for the Township of Strong or his/her authorized representative(s) acting within their authority for the SSJ Restructuring Committee. Any change to the Contract must be approved in writing by the Clerk Administrator and the Successful Proponent.

Contract Term

It is expected that the initial startup of the project will commence September 2025. The entire process for financial study is to be completed by December 2025. Should the Municipalities exercise the right to extend this Contract, the Successful Proponent shall enter into negotiations to determine the new rates for services listed in this RFP. Only upon satisfactory negotiations of both parties shall the Contract be extended. All rates negotiated for each Contract extension shall remain firm for the entire extension.

WSIB Clearance

The Proponent certifies that it is in full compliance with the Workplace Safety and Insurance Act.

Indemnification

The Successful Proponent must agree to keep the municipalities indemnified against any and all claims, actions or demands that may be brought, made or arise in respect of anything done or omitted to be done by the Successful Proponent or its employees who shall be and remain at all times and for all purposes, the servants or employees of the

Successful Proponent, save and except to the extent that such claims, actions or demands arise from or relate to the negligence, wrongful act or omission of the municipalities, or any of its officers or employees.

Accessibility for Ontarians with Disability Act (AODA)

The Proponent will provide the municipalities with documentation indicating that training in accordance with the requirements of Regulation 429/07 has been provided to all of their staff who will be providing goods and services.

Assignment of Contract

This Contract may not be assigned in whole or in part without the written consent of the Municipal contact on behalf of the SSJ Restructuring Committee.

Termination

The SSJ Restructuring Committee reserves the right, without prejudice, to cancel the remaining Contract, by providing 90 days' notice in writing if dissatisfied in any way with performance, or any other elements of the service provided.

Contractual Disputes

In the event of a dispute between the SSJ Restructuring Committee and the Successful Proponent, both parties agree to appoint representatives, who in good faith will use their best efforts to resolve the dispute.

Should the representatives be unable to promptly resolve the dispute, both parties shall agree to continue the work as required being understood that neither party will jeopardize any claim that they may have.

Severability

In the event that any provision shall be judged or decreed to be invalid, such ruling shall not invalidate the entire Agreement but shall pertain only to the provision in question and the remaining provisions shall continue to be valid, binding and in full force and effect.

Cancellation

Any contract termination by the successful Proponent will require sixty (60) days' notice to the municipalities unless otherwise noted and agreed to.

Governing Law

Any Contract resulting from this RFP shall be governed by and interpreted in accordance with the laws of the Province of Ontario.

Statement of Acceptance (Appendix A)

All responses must be signed:

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 Strong/Village of Sundridge/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 municipality's 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 Company Name:	
Respondent's Signature:	
Respondent's Printed Name:	
Respondent's Title:	
Email:	
Business Phone:	
Business Fax:	
Mailing Address	