

2019-12-16

**REQUEST FOR PROPOSAL
RFP #48 (2019-12)
CAPITAL FORECASTING, PREVENTATIVE MAINTENANCE, ASSET MANAGEMENT
SOFTWARE IMPLEMENTATION & MAINTENANCE
INCLUDING FACILITY CONDITION ASSESSMENT**

You are invited to submit a written proposal to provide professional services for capital forecasting, preventative maintenance, and building asset management system to manage all Toronto Zoo facility assets. The Toronto Zoo is seeking to implement a web-based system that will provide software application hosted by the proponent. The Toronto Zoo is also seeking a facility condition assessment of its buildings and mechanical & electrical systems.

Project Briefing: A project briefing for consultants will be held **Friday, 2019-12-20, at 0900 hours (9:00 a.m.)**. Meet at the Administrative Support Centre, enter at Gate A, 361A Old Finch Avenue, west of Meadowvale Road, Toronto, Ontario, M1B 5K7.

Proposal: Provide **five (5)** copies of your proposal, **one (1)** unbound signed and clearly marked as ORIGINAL and **three (3)** copies of the original proposal clearly marked as COPY and **one (1)** electronic copy (Microsoft Word or PDF) on a flash drive in a sealed package or envelope. The original and all copies should be identical (excluding any obvious differences in labeling as noted above). Proposal to be delivered to the office of Purchasing & Supply, Toronto Zoo, Administrative Support Centre, 361A Old Finch Ave., Toronto, Ontario, M1B 5K7 by:

Due Date: **Friday, 2020-02-07, by 1200 hours (noon), local time**

Proposals shall remain in effect for a period of ninety (90) days from the Proposal due date.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

If you have any queries regarding this request for proposal, please contact Mr. Peter Vasilopoulos, Supervisor of Purchasing & Supply at 416 392-5916 or pvasilopoulos@torontozoo.ca. If you require further technical details, please contact Ben Knoop – Project Manager, bknoop@torontozoo.ca.

Yours truly,

Taryne Haight
Manager, Financial Services

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1.0 GENERAL TERMS

1.1 The following definitions will apply to this Request for Proposal and to any subsequent Contract:

1.1.1 **“Board” or “Toronto Zoo”** means the Board of Management of the Toronto Zoo;

1.1.2 **“CEO”** means the Chief Executive Officer of the Toronto Zoo;

1.1.3 **“Preferred Consultant”** means the person, partnership or corporation contracting with the Board to provide the required Services;

1.1.4 **“Contract”** means acceptance by the Toronto Zoo (by way of written acknowledgement, Agreement, Contract or Purchase Order) to furnish Services for money or other considerations;

1.1.5 **“Contract Price”** means the price payable under the contract to the Consultant, being the Proposal Price eventually accepted by the Board of Management of the Toronto Zoo subject to any changes pursuant to the Contract Requirements;

1.1.6 **“Construction Act”** means the *Construction Act*, R.S.O. c. C.30.

1.1.7 **“Proponent”** means an individual or company that submits or intends to submit, a proposal in response to this Request for Proposal;

1.1.8 **“Proposal Price”, “Contract” and “Contract Documents”** have the meanings set out therefore in clauses contained in these documents;

1.1.9 **Request for Proposal (RFP)”** means the RFP document in its entirety, inclusive of any addenda that may be issued by the Toronto Zoo;

1.1.10 **“Services” or “Work”** means everything that is necessary to be performed, furnished delivered by the Consultant to meet the Consultant’s obligation under this Contract;

2.0 DESCRIPTION AND SCOPE OF PROJECT

The Toronto Zoo is seeking software and a facility condition assessment.

2.1 Part 1: Software

The consultant/contractor will be responsible to implement a cloud-based solution, including its related installation, configuration, data input/migration, implementation, annual maintenance and training services that will provide the following functions:

- Capital asset planning and management,
- capital forecasting,
- preventative maintenance management, and
- work order management

The software application must be capable of accepting all existing data from upcoming Toronto Zoo Site Services Study. The system could also have work

order, parts management, and GIS capabilities as listed in section 3.1 below. The software application shall be delivered with all data pre-loaded.

- 2.1.1 The Toronto Zoo will always own all of the data contained within the software, even after the end of the contract period or in the event of bankruptcy of the software supplier. Data shall be hosted in Canada or the United States of America.
- 2.1.2 Consultants will conduct interviews with key Zoo resource staff to gain an understanding of users service requirements and current facility related matters.
- 2.1.3 Existing site drawings at the Toronto Zoo are for review and site familiarization only. Background information provided by the Zoo is for general reference.
- 2.1.4 Consultant to attend and take minutes at all meetings, other site, facility and program reviews, and special meetings as required throughout the duration of the project.
- 2.1.5 Consultant to co-ordinate and liaise with all sub-consultants and others as necessary making sure all relevant issues have been raised and concluded.
- 2.1.6 Upon award of the contract, the selected Consultant will enter into an agreement for Software with the Zoo by purchase order or contract incorporating the terms and conditions of the Request for Proposal and the Proponent proposal, as determined by the Zoo.
- 2.1.7 It is Toronto Zoo's preference to enter into an agreement with a single software provider that functions as a primary contact in providing a complete range of primary and secondary related services.

2.2 **Part 2: Facility Condition Assessment**

A comprehensive building condition assessment is required in accordance with the following, for all buildings identified in the attached Appendix IV.

- 2.2.1 The objectives of the assessment will be to:
 - Identify deteriorated elements that should be rehabilitated or replaced.
 - Identify improvements required to meet relevant standards & codes.
 - Estimate scope of repairs, replacements and improvements likely to be required.
 - Estimate the timing and cost of repairs, improvements.
 - Indicate approvals needed, if any, to proceed with contemplated work.
- 2.2.2 The Consultant shall indicate with their proposal how they would assess the buildings including structure, interior, and exterior conditions, fire and life safety, HVAC, mechanical and electrical systems.
- 2.2.3 Consultants will visit and examine the buildings and, coupled with a review of the existing building drawings and discussion with the building's operators, assess the building's conditions as it relates to relevant codes

and standards. These include, but are not limited to the current National Building Code, Ontario Building Code, AODA, ASHRE 90-1 and the Canadian ICOSA B6510M90 Barrier-Free Design Standards, Bill 208, Reg 309 related to environmental contaminants, and review building reports including the Toronto Zoo Master Plan (2016), Air Quality Survey, Designated Substances Survey, etc. City of Toronto Green Standards should be considered in all replacement design and costing.

- 2.2.4 Consultant will create asset IDs and a hierarchy for the Zoo's assets and tag (barcode) each asset. This asset hierarchy is to be designed to work with the proponent's software and is to be reviewed and approved by the Toronto Zoo. This is to be completed for every asset with a replacement value greater than \$1000.00.
 - 2.2.5 In reporting the findings from this assessment, where applicable, indicate the pertinent section and clause of the applicable code/guideline that applies to the conditions noted.
 - 2.2.6 It is anticipated that the successful firm will have at least the following disciplines in order to undertake this study: architectural, mechanical, and electrical engineering.
 - 2.2.7 In commenting on the life expectancy of the existing systems, indicate the standard, norm or life cycle of the existing building elements or the duration systems are expected to last with normal maintenance.
 - 2.2.8 The assessment is to indicate if the buildings and components under the Audit meet current standards and if not, what level of repair or replacement, design or reconstruction would be necessitated.
 - 2.2.9 Final audit products, drawings, specifications, renderings, models, photographic and other products including an interim and final Report are essential deliverables of the audit.
- 2.3 Where there is a change to the scope of the project, the Consultant will provide an estimate of the costs of the changed items for approval prior to undertaking the additional work.
- 2.4 Direct assistance and liaison of Consultant with Zoo Facilities & Services staff. The Consultant will liaise with Zoo staff throughout the project regarding audit methodology, site access, and to review the audit reports and recommendations.

3.0 CONSULTANT SERVICES/DELIVERABLES TO BE PROVIDED – RESPONSIBILITIES

3.1 Software:

The Proponent shall provide an Application that meets the following requirements. Ideally, the proponent will provide a single application that meets all requirements listed in appendices II & III. Any customization should be minimal and be clearly identified.

The requirements have been divided into “primary” and “secondary”. Primary requirements are the minimum necessities and the secondary requirements are

desirable, but may not be required at this time. Please indicate which of the secondary requirements are included in your base software package, and which are additional, customization, or add-ons. Any additional costs for secondary items must be clearly itemized in the pricing forms. The Zoo requires the ability to disable any secondary functions that are included with the base software package in order to simplify operation for staff during software implementation.

The Toronto Zoo has the following number of software users:

- 10 users of the Capital Forecasting functions of the software.
- 100 users of the “secondary functions” (executing & updating work orders, performing preventative maintenance, removing items from parts inventory, etc.)
- 200 users that only require the ability to enter work orders.

Complete the attached Appendix II for primary requirements and Appendix III for secondary requirements.

3.2 Facility Condition Assessment:

Objectives

- Provide an assessment of the existing deferred maintenance and deficiencies. For every deficiency identified in the audit report, devise one or more method of correction.
- For every correction, create a prioritized schedule for the work and provide an estimated budget using the RSMeans data indexed for Toronto or equivalents
- Rank and prioritize all deficient conditions, associated correction projects and information concerning building systems and deficiency.
- Provide digital photograph documentation of individual assets and each identified deficiency that is linked to the asset integrating with the software tool to document individual assets and requirements
- Establish an asset depreciation analysis to forecast renewal investment rates required to maintain facilities over time.
- The minimum cost threshold for the assessment (capital threshold) is \$5,000.

Deficiency Priorities

3.3 Each correction project identified in the field audit may be prioritized in the following manner, or as recommended by the successful proponent:

3.3.1 Priority 1 Currently Critical (Immediate)

Conditions in this category require immediate action to:

- a. correct a cited safety hazard
- b. stop accelerated deterioration
- c. return a facility to operation

3.3.2 Priority 2 Potentially Critical (Year One)

Conditions in this category, if not corrected expeditiously, will become critical within a year. Situations within this category include:

- a. intermittent operations
- b. rapid deterioration
- c. potential life safety hazards

- 3.3.3 Priority 3 Necessary – Not Yet Critical (Years 2 –5)
Conditions in this category require appropriate attention to preclude predictable deterioration or potential downtime and the associated damage or higher costs if deferred further.
- 3.3.4 Priority 4 Recommended (Year 6-10)
Conditions in this category include items that represent a sensible improvement to existing conditions. These are not required for the most basic function of the facility; however, Priority 4 projects will improve overall usability and/or reduce long-term maintenance costs.
- 3.3.5 Priority 5 Does Not Meet Current Codes/Standards – “Grandfathered”
Conditions in this category include items that do not conform to existing codes, but are “grandfathered” in their condition. No action is required at this time, but should substantial work be undertaken in contiguous areas, certain existing conditions may require correction.

Deficiency Categories

- 3.4 Each correction project identified shall be assigned and may fall under one of the following categories, or as recommended by the successful proponent:
- Life-safety Code Compliance
 - Building Code Compliance
 - Accessibility Code Compliance
 - Building Integrity
 - Functionality
 - Acoustics
 - Lighting
 - Temperature control
 - Space functionality
 - Appearance
 - Energy
 - Environmental: (as provided in client-supplied facilities condition data)
 - ACBM (asbestos containing building materials)
 - PCBs
 - Lead-based paints
 - CFCs
 - IAQ (indoor air quality)
 - Water Quality

The Consultant’s Fee Proposal should include the following items:

3.5 Structural/Architectural

- 3.5.1 Review the structural condition of the building including its foundation to assess its condition structural adequacy and ability to accommodate the current and future uses.
- 3.5.2 Assess the condition of the roofing system paying particular attention to the sloped glazing, drainage, condition of roof membrane, perimeter curb and

flashing, penetrations, insulation, and ability to accommodate current and approved window washing technologies.

- 3.5.3 Assess the exterior cladding especially the skylights and the overhead glazing systems, as to its structural integrity to meet the current Building Code and energy conservation criteria, as to conditions, moisture penetration, anchorage to structural frame and concerns with all joints and connections.
- 3.5.4 Assess the condition of exterior openings (doors and windows) as to air and moisture penetration, energy efficiency, and condition of caulking and sealants.
- 3.5.5 Provide a general assessment of the structural system inclusive of but not limited to:
 - structural frame
 - floor loadings, columns/bay size
- 3.5.6 Assess the maintainability of the structures and its interior and exterior components, fitments and finishes.
- 3.5.7 Assess roof drainage (including snow/ice) and interface with site drainage.

3.6 Fire and Life Safety and Fire Prevention

- 3.6.1 Review building conditions as per fire and life safety codes inclusive but not limited to, fire separations, fire stops, fire ratings, smoke removal systems, pressurized stairwells, firefighting and communication systems.
- 3.6.2 Assess stand-by systems for their adequacy including stand-by generator, emergency lights, sump pumps and intercom systems, etc.
- 3.6.3 Review the life-safety and fire prevention systems as to life expectancy and need for upgrading or replacement.
- 3.6.4 Review the adequacy of exit lights at stairwells, lobbies, etc. and interface with emergency power supply.

3.7 H.V.A.C., Electrical and other Building Systems

- 3.7.1 Review the capacity of the current systems as to their functionality, potential for upgrading, expansion, and remaining lifespan.
- 3.7.2 Assess the energy efficiency characteristics of current systems and the system controls associated therewith.
- 3.7.3 Assess the appropriateness of current systems from a noise, dust and environmental health point-of-view paying particular attention to fresh air intake.
- 3.7.4 Review the size and capacity of the existing electric and water service and their ability to accommodate further building expansions.

- 3.7.5 Assess the maintainability of the mechanical and electrical systems within the buildings.
- 3.7.6 Outline any concerns with regard to the conditional operations of the existing systems (e.g. repairs not possible due to unavailability of replacement parts, non-compliance to codes).
- 3.7.7 Assess the energy-efficiency aspects of the structures with respect to zoned heating control, energy efficient lights, motors, chillers, energy-efficient glazing systems.
- 3.7.8 Comment on the operating characteristics of existing HVAC systems (e.g. ease of maintenance, energy efficiency) and the life expectations of existing equipment under normal operating conditions and preventative maintenance.
- 3.7.9 Assess the adequacy of the existing systems to accommodate power failures.
- 3.7.10 Determine whether the existent systems comply with the latest C.F.C. directives contained within the Clean Air Act.
- 3.7.11 Assess the adequacy of the buildings' primary and secondary electrical supply to meet current and future demands, and ease expansion to meet changing circumstances (e.g. computer technology).
- 3.7.12 Comment on the ability of the buildings to accommodate increased computer technology.
- 3.7.13 Review current lighting levels in the various work spaces as to functionality, light levels and appropriateness for task specific activities.
- 3.7.14 Review the adequacy of the building electrical ground system.
- 3.7.15 Assess the quality of the workplace environment as to air changes, dust and particulate matter control, humidification which would have particular relevancy at food areas, change rooms, etc.
- 3.7.16 Assess and identify any asbestos (including type and condition) contained in the buildings to be reviewed.
- 3.7.17 Create an asset hierarchy and tag all assets.

3.8 Interior Finishes and Fitments

- 3.8.1 Review interior finishes of all rooms inclusive of floor, wall and ceiling systems to assess condition, ease of maintenance, lifespan, safety, accessibility, etc.
- 3.8.2 Ascertain if any unacceptable products (e.g. asbestos coatings, firespray, etc.) have been used and the extent of same.

3.8.3 Comment as to the condition and acceptability of the interior space and room separation to provide good working conditions taking into consideration the various functional relationships and noise generating activities.

3.8.4 Review dimensions of interior circulation, corridors, auditoriums, lobbies and stairwells in regards to code requirement, operational and the attached safety requirements.

3.9 Accessible Facilities

3.9.1 Review all publicly accessed facilities with respect to the Ontario Building Code (O.B.C.), the Accessibility for Ontarians with Disabilities Act (AODA) and the Can/CSA B651-M90 Barrier-Free Design Standards paying particular attention to accessible washrooms, access to all public spaces, entrance and exit from the building and vestibule space.

3.9.2 Consideration for visual, hearing, and physical disabilities to be addressed.

3.10 Proposed Recommendations

3.10.1 Report to review and evaluate the conditions of all major components.

3.10.2 Report to include budget estimates on the basis of expected repair or replacement costs and life expectancies of the common elements.

3.10.3 Recommend improvements which are likely to minimize deterioration or increase the life expectancy of existing elements.

3.10.4 Identify those common elements likely to deteriorate and require repair or replacement.

3.10.5 Estimate the scope of repairs or replacement which is likely to be required.

3.10.6 To estimate the repair phasing when repairs or replacement will be necessary and the life expectancies following the repairs of the existing facility.

3.10.7 Estimate budgets to carry out the repairs or replacement of all the common elements and life expectancies.

3.10.8 Report to include multi-year capital and 15 year maintenance plan and preventative measures.

3.11 Administrative

3.11.1 Consultant to co-ordinate and liaise with all sub-consultants and others as necessary making sure all relevant issues have been raised and concluded.

3.11.2 Arrangements of special consultants, additional work to the Services, and similar costs to be the responsibility of the Consultant, are to be identified

and included as direct disbursements in your Fee Proposal. Special advisors/resource experts recommended by the Consultant and approved by the Zoo will be integrated into the meetings/discussions and paid from disbursements.

- 3.11.3 Disbursements including, but not limited to, reproduction, postage, courier, fax machine, long-distance telephone calls, printing of drawings and specification, data processing and photographic production, renderings, models and mock-ups as required, surveys, any permits and applications. Photocopies of receipts must be provided when claiming for disbursements.
- 3.11.4 Preparation of all planning documents, maps, drawings, and other final products for the Services as necessary.
- 3.11.5 Consultant is responsible for the preparation of draft and then final Audit of Toronto Zoo Buildings Reports.
- 3.11.6 Recommendations to incorporate energy efficiency, sustainability and "Green Technology".
- 3.11.7 Report to reflect/incorporate Capital/Operating Project plans into report recommendation.
- 3.11.8 Audit Report to include an Executive Summary complete with tabular financial summary, and separate detailed sections for each building, holding and exhibit.
- 3.11.9 Provide five (5) copies of the report in draft for review and comment by the Toronto Zoo.
- 3.11.10 Provide five (5) copies of the final report to the Toronto Zoo. One original copy will be in a 3-ring binder, while the other four are to be bound and one (1) electronic copy (Microsoft Word or PDF) on a CD or flash drive.
- 3.11.11 FCA data is to be preloaded into the software solution provided by the proponent.
- 3.11.12 Consultant to prepare an inspection plan and schedule for each location and submit to the Zoo for approval prior to commencing the site investigation work.

3.12 Work Not Included in Scope of Work

- 3.12.1 Assessment of all underground and above ground site services, not contained within the buildings noted in Appendix IV, including water, gas, hydro, communications, storm, and sanitary lines.
- 3.12.2 Assessment of buildings/structures not identified in Appendix IV.
- 3.12.3 Assessment of process systems (i.e. waste treatment) in buildings.

3.12.4 Equipment, systems, structures, required for animal exhibitry and not required as part of the operation of the overall building.

4.0 INSURANCE, INDEMNIFICATION AND POLICIES

- 4.1 Professional liability insurance in the amount of \$1,000,000 (per claim) and \$2,000,000 general liability insurance in respect of injury or death to a single person or for property damage in a manner satisfactory to the General Manager must be maintained through the Project and included in the Fee Proposal.
- 4.2 The Consultant hereby agrees that the Consultant will keep harmless and fully indemnify the Board, the City of Toronto, the Toronto and Region Conservation Authority, their employees, officers and agents against all actions and claims against all loss, liability, judgments, costs, demands or expenses which they or any of them may sustain as a result of the negligent or intentional acts or omissions of the Consultant, its agents, servants, employees or sub-consultants or any of them, in the performance of the Services, save and except and only to the extent that any such loss, liability, judgments, costs, demands or expenses are caused by the Board or those for whom at law it is responsible.
- 4.3 All insurance policies shall be endorsed to provide a minimum advance written notice of not less than thirty (30) days, in the event of cancellation, termination or reduction in coverage or limits, such notice to be made to the Chief Executive Officer.
- 4.4 The Consultant shall, as applicable, conform to and enforce strict compliance with the Occupational Health and Safety Act and for purposes of the Act be designated as the "constructor" for the Service.
- 4.5 The Consultant must adhere to all relevant Zoo policies, including, but not limited to, the Contractor Safety Policy, Working in the Vicinity of Animal Containments Policy and the Vehicles on Site Policy, copies of which the Zoo shall supply to the Consultant.

5.0 PROPONENT SUBMISSION REQUIREMENTS

- 5.1 Title page showing request for Proposal Proponent's name
- 5.2 Duly executed proposal form
- 5.3 Indicate the individual or incorporated name of the Proponent (i.e. the prime Consultant); address(es); telephone and fax number(s); and name of key contact person(s).
- 5.4 The Proponent must provide names and company information for all Sub-consultants required by Consultant.
- 5.5 State the scope and limits of responsibility of the Consultant and Sub-consultants named in the team.
- 5.6 Provide a schedule or chart of the proposed tasks, hours and the hourly rates for each person associated with this project.
- 5.7 The Proponent must confirm compliance with the Insurance and Indemnification provisions identified in Section 9.0.
- 5.8 Clearly articulate key personnel to be involved with the Project and their responsibilities. Indicate the qualifications and experience (beyond a general resume), that each member will bring to the team and include a breakdown on the number of hours each will devote to the Project and their hourly billing rate. Indicate the total extent of availability of all team members throughout entire Project period.
- 5.9 Provide the name, location, client reference and brief description of not more than five (5) similar **projects carried out at Zoological Facilities** under the direct responsibility of the persons or team named above.
- 5.10 Clearly indicate how the Project will be managed to conform to assigned projects budgets, construction timing, etc.
- 5.11 Guarantee Project start immediately following successful confirmation of award of the Project, and work to implementation and completion schedule.

6.0 LEVEL OF EFFORT AND FEE SCHEDULE

- 6.1 On the Fee Proposal Form (Appendix I), provide an upset fee limit for:
 - 6.1.1 **Software** inclusive of disbursements, plus HST as follows:
 - **Cloud-based system provision and initial consulting fees for set up. (Fees for primary requirements & secondary requirements to be listed as per section 3.1)**
 - **Software subscription cost, annually (if applicable), by module, license, or other**
 - **Additional maintenance or support costs, annually (if applicable)**
 - **Disbursements**

The proponent shall list their fees in a modular format with all primary requirements being included in the base fee, and secondary requirements listed as additional modules with associated fees if applicable. Proponent must disclose any hidden IT costs associated with hardware, hosting, servers, etc.

6.1.2 **Facility Condition Assessment** inclusive of disbursements, plus HST as follows:

- **Site Inspection/Assessment**
- **Interim Report**
- **Final Report**
- **Disbursements**

All Consultant and Sub-consultants costs for research, specifications, models, and similar costs to be the responsibility of the Consultant, identified and included as part of the fees in the Fee Proposal.

6.2 Fee Schedule and Cost of Services

6.2.1 The Proponent shall attach a Level of Effort and Fees Schedule for all of the Services outlining level of effort by each team member, including hourly rates and total lump sum fee. The hourly rates will be used to value additional services if required. The fee schedule should show the maximum upset limits that the Consultant will not exceed unless the Project Manager request additional services which are beyond the Scope of Work as outlined in this RFP.

6.2.2 The Proponent shall include in the fee schedule all sub-Consultant fees and all disbursements.

6.2.3 The Proponent shall indicate any additional 'Optional Services' or costs not accounted for in the fee schedule as part of the proposal submission.

6.2.4 The Consultant will not be able to claim any additional cost as a result of changes to the Schedule or order of works, or for project delays due to inclement weather conditions. This condition shall be in effect for the duration of the project.

6.2.5 All Consultant and Sub-consultants costs and drawings, models, renderings and similar costs to be the responsibility of the Consultant, identified and included as part of the fees in the Fee Proposal.

6.2.6 Provide hourly rates for other services, which may be requested during completion of the Project.

6.2.7 An upset limit for disbursements is required, including, but not limited to, reproduction, postage, courier, fax machine, long-distance telephone calls; printing of drawings and specifications, photographic production, approved Consultant travel, as required. Photocopies of receipts must be provided for disbursements.

- 6.2.8 Soil and topographical surveys, arborist report, environmental testing, permits and application fees are not to be included in the Fee Proposal and will be reimbursed separately if required.
- 6.2.9 A 10% holdback will apply to all fees, not including disbursements, to be released after 30 days following acceptance of final construction of the Project.
- 6.2.10 Proposal prices shall remain in effect for a period of one hundred twenty (120) days from the proposal due date.

7.0 PROPOSAL EVALUATION AND SELECTION

- 7.1 The Proponent is urged to ensure that its Proposal is submitted in the most favourable terms in order to reflect the best possible potential, since less than best potential could result in exclusion of the Proposal from further consideration.
- 7.2 The Agreement will not be awarded to the Proposal with the lowest cost, but rather, award shall be based on a combination of related expertise, prior project experience and price. The lowest proposal may not necessarily be accepted, rather will be analyzed to determine the best overall value to the Zoo. Additionally, the Zoo may accept or reject any part of the Proponent's bid.
- 7.3 An Evaluation Team comprised of representatives designated by the Zoo will evaluate responses to the RFP.
- 7.4 There are three steps to the pre-defined evaluation process:
- Step 1 – Initial Review of Responses
Step 2 – Evaluation of Submitted Proposals
Step 3 – Evaluation of Presentations
- 7.5 Step 1 – Initial Review of Responses

The Zoo will open only those Proposals received by the Proposal Deadline and time specified within this RFP. Immediately upon opening, the Zoo will review each Proposal for compliance with the instructions and conditions applicable to this RFP. The Zoo, at its option, may seek Proponent retraction and clarification of any discrepancy/contradiction found during its review of Proposals.

- 7.6 Step 2 – Evaluation of Submitted Proposals

7.6.1 The Evaluation Team will evaluate each submitted Proposal, that has passed through Step 1, on criteria that will include, but not necessarily be limited to, the following:

Evaluation Criteria	Points
Software	
Demonstrated ability of the software solution to meet the requirements on the RFP	35
FCA	
Depth and breadth of the Project team's relevant	10

qualifications and experience with similar scale and type of projects	
Commitment to complete work according to schedule of events with continuity of team members in section 7.0 within the RFP	10
Ability to meet all requirements of the RFP	20
Details on the general approach and methodology that proponent would take in performing the services outlined within the RFP	10
Fee Proposal	15

7.6.2 The Zoo may, at its discretion, eliminate a Proposal from further consideration if it deems the overall cost to be prohibitive.

7.6.3 A short-list of suitable Proponents may be established who may be invited to Step 3 to provide presentations related to their Proposal.

7.7 Step 3 – Evaluation of Presentations (If Required)

7.7.1 Invited Proponent(s) shall provide presentations in support of their Proposals or to demonstrate or otherwise expand on the information contained therein.

7.7.2 The Proponent(s) shall ensure that the presentation is made by well-versed staff with the authority to make decisions and commitments on behalf of the Proponent.

7.7.3 Any and all costs incurred by the Proponent in order to prepare for and attend the presentation and/or demonstration including transportation, food, lodging, etc. shall be borne entirely by the Proponent.

7.8 The final score is then calculated as illustrated in the following table:

Evaluation	Score
Step 1 – Initial Review of Submitted Proposals	Prerequisite
Step 2 – Evaluation of Submitted Proposals	Maximum 100
Step 3 – Evaluation of Presentations (If Required)	(Maximum 50 If Required)
Total maximum score excluding Presentation	100
Total maximum score including Presentation	150

7.9 By responding to this Proposal, the Proponent agrees to accept the recommendation of the Evaluation Team as final.

7.10 All Proposals shall be submitted by the Proponent on the understanding that the Proposals shall become the property of the Zoo.

7.11 The Zoo reserves the right to accept or reject any or all proposals or cancel the

RFP. The lowest proposal may not necessarily be accepted, rather will be analyzed to determine best overall value to the Zoo.

8.0 SCHEDULE OF EVENTS:

The following is a tentative schedule for this project.

The Zoo expects detailed design work to begin immediately upon selection of the successful consultant, and be completed such that all construction/refurbishment work is completed as follows:

The final schedule will be developed jointly with the successful proponent in the first week of project execution:

Pre-Award	
Release of RFP	2019-12-11
Site Inspection	2019-12-20
Proponents' Question Deadline	2020-01-17
Submission Due	2020-02-07
Interviews, if necessary	Week of 2020-02-10
Notification of Award By the Toronto Zoo	2020-02-24
Post-Award	
Commencement of Work	2020-02-25
Draft Final Report / Presentation Due (FCA)	2020-05-29
Final Report / Presentation Due (FCA)	2020-06-26
Software Testing	2020-07-06 to 2020-08-07
Implementation and sign off (software goes live)	2020-08-17

The consultant to provide a detailed schedule based on the above dates and including all disciplines. The consultant should notify the Zoo of any component and milestone dates that are missing or changes that are required. Approved changes should be included in the detailed design schedule that is provided by the consultant.

The RFP process and project will be governed according to the above schedule or other schedule provided by the Consultant and approved by the Toronto Zoo. Although every attempt will be made to meet all dates listed, the Toronto Zoo reserves the right to modify any or all dates at its sole discretion. Appropriate notice of change will be provided, in writing, as soon as is feasible so that each Proponent will be given the same non-preferential treatment.

Upon award of the contract, the selected firm will enter into an agreement for Architectural and Engineering Services with the Zoo, incorporating the terms and conditions of the Request for Proposal and the proponent proposal.

9.0 PROPOSAL TERMS AND PROVISIONS

The successful Proponent shall be retained through a contractual agreement and/or a purchase order, which includes the terms and conditions of this Request for Proposal.

9.1 Consultant's Liability and Indemnity

The Consultant will from time to time at all times hereafter well and truly save, defend and keep harmless and fully indemnify the Board, the City of Toronto, and the Toronto and Region Conservation Authority and each of their officers, employees and agents (hereinafter called the "Toronto Indemnities") of, from and against all manner of action, suits, claims, executions and demands which may be brought against or made upon the Toronto Indemnities or any of them and of, from and against all loss, costs, charges, damages, liens and expenses which may be sustained, incurred or paid by the Toronto Indemnities, their officers, employees and agents or any of them by reason of or on account of or in consequence of the execution of this agreement or provision of the business or any other work or matter to be carried out or performed by the Proponent with respect to the Request for Proposal or any agreement that may result from the request for proposal process, and/or the non-execution or imperfect or improper execution thereof and will pay to the Toronto Indemnities on demand any loss, costs, damages and expenses which may be sustained, incurred or paid by the Toronto Indemnities or any of them in consequence of any such action, suit, claim, lien, execution or demand and any monies paid or payable by the Toronto Indemnities or any of them in settlement or discharge on account thereof.

The Consultant shall be responsible for any and all damages, or claims for damages for injuries or accidents done or caused by his or her employees, or resulting from the prosecution of the Work, or any of their operations, or caused by reason of the existence of location or condition of the works, or of any materials, plant or machinery used thereon or therein, or which may happen by reason thereof, or arising from any failure, neglect or omission on their part, or on the part of any of their employees to do or perform any or all of the several acts or things required to be done by him or them under and by these General Conditions, and covenants and agrees to hold the Board, the Toronto and Region Conservation Authority and the City of Toronto, their officers, agents, employees, Consultants and invitees harmless and indemnified for all such damages and claims for damage; and in case of the Consultant's failure, neglect or omission to observe and perform faithfully and strictly, all the provisions of the Work, the CEO may, either with or without notice (except where in these Contract Requirements, notice is specially provided for, and then upon giving the notice therein provided for), take such steps, procure such material, plant trucks and men, and do such work or things as he/she may deem advisable toward carrying out and enforcing the same and any such action by the CEO as he is herein empowered to take, shall not in any way relieve the Consultant or his/her surety from any liability under the Contract.

9.2 Incurred costs

The Proponent shall bear all costs and expenses with respect to the preparation and submission of its Proposal and the Proponent's participation in the proposal process (the "Proposal Costs"), including but not limited to: all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board and contract discussions and negotiations.

The Toronto Zoo shall not be responsible for or liable to pay any Proposal Costs of any Proponent regardless of the conduct or outcome of the Proposal Request, Purchase Order process, or Contract process.

- i. The RFP does not constitute an offer or tender by the Toronto Zoo. Receipt of Proposals by the Toronto Zoo pursuant to this RFP or selection or notification confers no rights under any Proposal nor obligates the Toronto Zoo in any manner whatsoever.

9.3 Liability of Errors

While the Toronto Zoo has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Toronto Zoo, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

9.4 Toronto Zoo Rights and Options Reserved:

The Toronto Zoo reserves the right to award the contract to any proponent who will best serve the interest of the Toronto Zoo. The Toronto Zoo reserves the right, in its sole discretion, to exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- (a) To reject any or all proposals.
- (b) To re-issue this RFP at any time prior to award of work.
- (c) To cancel this RFP with or without issuing another RFP.
- (d) To supplement, amend, substitute or otherwise modify this RFP at any time prior to the selection of one or more proponents for negotiation.
- (e) To accept or reject any or all of the items in any proposal and award the work in whole or in part.
- (f) To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements.
- (g) To permit or reject at the Toronto Zoo's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the proponents following proposal submission.
- (h) To request that some or all of the proponents modify proposals based upon the Toronto Zoo's review and evaluation.
- (i) To request additional or clarifying information or more detailed information from any Proponent at any time, before or after proposal submission, including information inadvertently omitted by the proponent.

9.5 Cancellation

Nothing herein shall be construed as giving the Proponent the right to perform the services contemplated under this agreement beyond the time when such services become unsatisfactory to the Toronto Zoo; and in the event that the Proponent shall be discharged before all the services contemplated hereunder have been completed or the services are for any reason terminated, stopped or discontinued because of the inability of the Proponent to serve under this agreement, the Proponent shall be paid only for the portion of the work which shall have been satisfactorily completed at the time of termination.

9.6 Ownership and Confidentiality of Board-Provided Data

All correspondence, documentation and information provided by the Toronto Zoo staff to any bidder or prospective Bidder in connection with, or arising out of this RFP, the services or acceptance of the RFP:

- 9.1.1 is and shall remain the property of the Board;
- 9.1.2 must be treated by Proponents and Prospective Proponents as confidential;
- 9.1.3 must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent agreement.

9.7 Copyright:

The final product and related materials from the work is to be for the exclusive use of the Toronto Zoo. The Toronto Zoo shall be the only and sole owner of the product and related materials for the sole and unfettered use by the Toronto Zoo. Upon payment of the said product and related materials by the Toronto Zoo, the successful bidder shall have no hold, proprietary claim, ownership, use of any kind, intellectual or otherwise nor shall there be any restrictions placed on the final product and related products by the successful bidder. By submitting a Proposal in this response to this RFP, the Bidder shall thereby acknowledge and agrees that the Toronto Zoo has exclusive ownership and sole and unfettered use of this final product and related products.

9.8 Ownership and Disclosure of Proposal Documentation

The documentation composing any Proposal submitted in response to this RFP, along with all correspondence, documentation and information provided to the Toronto Zoo by any Bidder in connection with, or arising of this RFP, once received by the Toronto Zoo:

- 9.8.1 Shall become property of the Toronto Zoo and may be appended to purchase order issued to the successful Bidder;
- 9.8.2 Shall be come subject to the Municipal *Freedom of Information and Protection of Privacy Act* (“*MFIPPA*”) and may be released pursuant to that Act

Because of *MFIPPA*, prospective Bidders are advised to identify in their Proposal material any scientific, technical, commercial, proprietary or similar confidential information, the disclosure of which could cause them injury.

Each Bidder's name shall be made public. Proposals will be made available to member of the Board on a confidential basis and may be released to members of the public pursuant to *MFIPPA*.

9.2 Conflict of Interest Statement

In its Proposal, the Proponent must disclose to the Toronto Zoo any potential conflict of interest that might comprise the performance of the Work. If such a conflict of interest does exist, the Toronto Zoo may, at its discretion, refuse to consider the Proposal.

The Proponent must also disclose whether it is aware of any Toronto Zoo employee, member of board, agency or commission or employee thereof having a financial interest in the Proponent and the nature of that interest. If such an interest exists or arises during the evaluation process or the negotiation of the Agreement, the Toronto Zoo may, at its discretion, refuse to consider the Proposal or withhold the awarding of any agreement to the Proponent until the matter is resolved to the Toronto Zoo's sole satisfaction.

Proponents are cautioned that the acceptance of their Proposal may preclude them from participating as a Proponent in subsequent projects where a conflict of interest may arise. The Consultant(s) for this project may participate in subsequent/other Toronto Zoo projects provided the Consultant(s) has (have) satisfied pre-qualification requirement of the Toronto Zoo, if any and in the opinion of the Toronto Zoo, no conflict of interest would adversely affect the performance and successful completion of an Agreement by the Consultant(s).

If, during the Proposal evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to potential conflict of interest, then the Proponent will so inform the Toronto Zoo. If the Toronto Zoo requests, then the Proponent will refuse the new assignment or will take steps as are necessary to remove the conflict of interest concerned.

9.3 No Collusion

A proponent shall not discuss or communicate, directly or indirectly, with any other Proponent or their agent or representative about the preparation of the Proposals, Each proponent shall attest by virtue of signing the Proposal Submission Form that its participation in the RFP process is conducted without any collusion or fraud. If the Toronto Zoo discovers there has been a breach of this requirement at any time, the Toronto Zoo reserves the right to disqualify the Proposal or terminate any ensuing Agreement.

9.4 Governing Law

This RFP and any quotation submitted in response to it and the process contemplated by this RFP including any ensuing Agreement shall be governed by the laws of the Province of Ontario. Any dispute arising out of this RFP or this RFP process will be determined by a court of competent jurisdiction in the Province of Ontario

10.0 PROPOSAL FORM

The undersigned Proponent having reviewed and fully understood the RFP and all terms and requirements of the RFP and all terms and conditions of the RFP and information provided, hereby submits the attached Proposal and supporting materials (“the Proposal”) in accordance.

I/We, hereby, have received, allowed for and included as part of our submission all issued Addendum numbered _____.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

By submitting a Proposal the Proponent agrees to all of the terms and conditions of this Request for Proposal.

By signing and submitting this proposal, you are agreeing to the release of your proposal information, as deemed necessary by the Board, in order to conduct business associated with this proposal or project.

COMPANY INFORMATION	
Company Name:	
Name of authorized Signing Officer	Title:
Signature:	Date:
Contact Name:	Title:
Address:	
Telephone #:	Fax #:
Email:	Web Site:
HST #:	

DISCOUNT	Discount	Days
Discount allowed for prompt payment and period within which invoice must be paid to qualify.	%	

**NOTICE OF NO BID
INSTRUCTIONS:**

It is important to the Toronto Zoo to receive a reply from all invited bidders. If you are unable, or do not wish to submit a bid, please complete the following portions of this form. State your reason for not bidding by checking the applicable box(es) or by explaining briefly in the space provided. It is not necessary to return any other Request for Proposal/Quotation/Tender documents or forms. Please just return this completed form and return to Purchasing & Supply by email purchasing@torontozoo.ca or fax 416 392-6711 prior to the official closing date.

A Proposal/Quotation/Tender is not submitted for the following reason(s):		
<input type="checkbox"/>	Project/quantity too large.	<input type="checkbox"/> Project/quantity too small.
<input type="checkbox"/>	We do not offer services or commodities to these requirements	<input type="checkbox"/> Cannot meet delivery or completion requirement
<input type="checkbox"/>	We do not offer this service or commodity.	<input type="checkbox"/> Agreements with other company do not permit us to sell directly.
<input type="checkbox"/>	Cannot handle due to present commitments.	<input type="checkbox"/> Licensing restrictions
<input type="checkbox"/>	Unable to bid competitively.	<input type="checkbox"/> We do not wish to bid on this service or commodity in the future.
<input type="checkbox"/>	Insufficient information to prepare quote/proposal/tender	<input type="checkbox"/> Specifications are not sufficiently defined
<input type="checkbox"/>	We are unable to meet bonding or insurance requirements.	

<u>Other reasons or additional comments (please explain):</u>

Company Name:	
Address	
Contact Person:	
Signature of Company Representative:	
Date:	
Phone Number:	
Email address	
Fax Number:	

APPENDIX I

FEE PROPOSAL FORM

Notes: Software costs to be broken down on a separate pricing sheet or on Appendix II and Appendix III if applicable. Software costs to clearly indicate initial fees, subscription cost, maintenance cost, and support fees if applicable. If needed, please provide a separate pricing sheet showing the cost of individual “modules” that must be purchase by the Zoo to satisfy the Secondary Requirements. The proponent shall also clearly indicate if pricing varies by number of users and/or type of user.

<u>PROPONENT NAME:</u>				
SOFTWARE				
ITEM	FEEES	DISBURSEMENTS	HST	TOTAL
Cloud-based system provision and initial consulting fees for set up. (Fees for primary requirements & secondary requirements to be listed as per section 3.1)				
Software subscription cost, annually (if applicable), by module, license, or other				
Additional maintenance or support costs, annually (if applicable)				
TOTAL COSTS				
FACILITY CONDITION ASSESSMENT COSTS				
ITEM	FEEES	DISBURSEMENTS	HST	TOTAL
Site Inspection / Assessment				
Interim Report				
Final Report				
TOTAL COSTS				

Appendix II Building Asset Management System -Primary Requirements

Instructions: If your solution completely meets the identified requirement description, place a Y in the adjoining cell in the **INCLUDED (based functionality)** column. If your solution does not meet the identified requirement description, place a N in the column. If the proposed solution does not satisfy the requirements in full in the "vanilla" version, complete the **COMMENT** column and indicate any solution available or tailoring, customization or other software required along with an indication of additional costs, if any.

LINE #	PRIMARY (MANDATORY) REQUIREMENTS	
	Description	<div style="text-align: center;"> INCLUDED (base functionality) Y or N </div>
PART A - GENERAL REQUIREMENTS		
1	Software is cloud hosted	
2	Compatible with Windows 10 and Mac OS *****, IOS, Android	
3	System allows for at least 100 users	
4	System to be backed up on a regular basis. The proponent will ensure that best practices for backup and disaster recovery are used.	
5	System to be updated and enhanced regularly	
6	System to be available at least 99% of the time on average	
7	System must have an API available or other method to enable integration with existing or third-party software systems including the Toronto Zoo's existing financial system (MS Dynamics).	
8	Unlimited storage capacity for Toronto Zoo data.	
PART B - TRAINING & SUPPORT		
1	Proponent shall provide unlimited training and technical support as part of the maintenance package.	
2	Provide all trained users with access to user manuals, reference cards, etc.	
3	Proponent must offer toll-free phone, e-mail, and live chat support. Support must be available between the hours of 8:00 a.m. and 4:00 p.m., ET (Eastern Time), Monday through Friday, excluding statutory holidays at a minimum.	
PART C - SYSTEM ADMINISTRATION		
13	System must allow for multiple user types (user, requestor, administrator, etc.)	
14	System must allow users to reset password	
15	A Toronto Zoo IT manager will be able to will administer user access and passwords by configuring, adding, deleting, and modifying user access to the Application.	
16	The software should be available for a minimum of fifteen (15) years	
PART D - DISPLAY & CUSTOMIZATION		
17	System must include configurable dashboards	
18	System must contain quick link shortcuts to application features	
19	System must provide configurable data views, including: <ul style="list-style-type: none"> • Add/Remove/Move Columns • Sort on columns • Search and filter 	
PART E - ASSET MANAGEMENT The system shall have the following capabilities:		
20	Ability to accept all assessment data from Toronto Zoo's existing building condition assessment including, but not limited to, the following: <ul style="list-style-type: none"> • Facility, site, component, and sub-component data • Building profile data • Facility overview information • Requirements and recommended actions data • Cost estimates and supporting data 	
21	Auto prioritization of assets	
22	Ability to associate multiple assets (e.g. parent-child relationships)	
23	Ability to associate documents with assets	
24	Ability to attach multiple notes, photos and documents (MS office formats, AutoCAD, Revit, PDF) to an asset	
25	Ability to duplicate an asset	

26	Ability to print asset information		
27	Contains custom fields for asset properties		
28	Allows for trend analysis		
29	Allows for the csv or Excel export of asset data		
30	Ability to assign Asset Criticality values to an asset		
31	Ability to track total cost of ownership and depreciation		
32	Ability to filter through asset history		
33	Ability to auto-generate BOM as parts are added onto a work order		
	PART F - DATA ANALYSIS & MODELLING The system shall have the following capabilities:		
34	Perform FCI calculation of a building, zoogeographic region or asset based on the following: $FCI = (\text{deferred maintenance costs} + \text{renewal costs}) / (\text{current replacement cost of building})$ <ul style="list-style-type: none"> • Renewal costs will include current and future costs as identified in the requirements. The future timeframe will be user selectable from 1 to 5 years in 1 year increments. • Deferred maintenance and renewal costs will include facility and site requirements but the FCI calculation should be capable of excluding or including repairs to site components. 		
35	Ability to support life-cycle analysis for forecasting long-term capital repair costs. The Application will need to accept repetitive major system renewals based on pre-defined or user-defined life-cycle intervals and associated costing.		
36	Ability to model the impact of different funding levels on the FCI as well as be able to model the impact of potential projects on the FCI. This ability must be available for a single Facility or Site, portfolio-wide, or any selected subset of assets.		
37	Ability to create user defined metrics for monitoring and reporting of Key Performance Indicators.		
38	Ability to automatically update FCI when User changes status of a requirement(s) to completed.		
	PART G - CAPITAL REPORTING The system shall have the following capabilities:		
39	Capable of generating multiple-year capital repair plans (number of years to be user-defined between 1 and 20 years) for a given asset or group of assets, based on data entered from Building Condition Assessments.		
40	Ability to generate capital repair plans from any combination of user-selected criteria.		
41	The application shall provide a methodology for ranking all capital needs and applying multi-year budgets to define an annual capital spending plan		
42	Be able to capture the overall organization's priorities. There should be an understanding of how various metrics relate to each other, such as how important life safety issues are to building use, and so forth. The system should be able to rank any and all variables that are associated with assets, systems, specific needs, etc.		
43	Be able to define one or more approaches to the ranking priorities for capital needs, thus allowing for different approaches to be applied to different aspects of the portfolio.		
44	Be able to define budgets for capital needs over multiple years based on a number of different criteria, such as an entered amount, a projected (extrapolated) amount, or a percentage of the total current replacement value. The system should allow multiple budgets to be defined.		
45	Rank all capital needs based upon the defined priorities and apply the defined budgets to create an annual capital spending plan.		
	PART H - COST ESTIMATES The system's costing function shall:		
46	Be updated annually including inflation rates if applicable.		
47	Allow entry of user defined cost adjustment factors to account for special circumstances.		
48	Allow user defined estimated costs to be generated automatically by the Application or manually entered and allow entry of cost adjustment factors.		
49	Be capable of spreading costs over several years to accommodate studies or phased work.		
50	Automatically update costs that are developed using the costing system. The Application will also be able to automatically update manually entered costs using either a costing-system-supplied inflation figure, or a user-supplied		

51	Generate the replacement cost of a Building and will be defined by the Building type and a cost model.		
	PART I - REPORTING The system shall have the following capabilities:		
52	Ability to report on asset cost summary		
53	Ability to report on asset life cycle analysis		
54	Ability to report on asset life cycle analysis with details		
55	Ability to report on asset summary		
56	Ability to produce graphical and / or chart-formatted reports that provide information such as multi-year cost data.		
57	Ability to run graphic reports with or without their respective photographs and / or drawings.		
58	Ability to provide summary and detailed versions of Building condition reports and other lengthy reports.		
59	Application generated reports will be formatted to standard paper sizes and be provided with a font size that is easy to read.		
60	Ability to generate preformatted Facility Condition Assessment report generated with information entered into the Application		
61	Ability to generate preformatted FCI report at various levels of the organization including: <ul style="list-style-type: none"> • facility (single) • facilities (all Facilities on the site) • facilities in a zoogeographic region (i.e. African Savanna) 		
62	Ability to generate preformatted scenario modeling reports, showing or comparing trends, such as Building condition versus funding over time, FCI versus funding over time, funding required to maintain FCI over time, Deferred Maintenance versus funding over time, etc.		
63	Ability to generate other preformatted reports including: <ul style="list-style-type: none"> • reports of recommended studies and placeholder reports • reports by classification (e.g. Priority 1 through 5) • reports by system (e.g., all roofing at all Buildings, all elevators, etc.) • reports by year • reports by cost 		
64	Ability to allow users to select pre-configured or blank layout and construct a report by selecting, sizing and placing pre-defined components (widgets) to setup a fully configurable report. Ability to save report as a user defined report.		
65	Ability to add user defined metrics to reports.		
66	Ability to provide audit logs to report on changes made within the system, when and by which user.		
67	System can provide report format flexibility (e.g. capable to produce reports in .pdf, Excel, and other standard formats)		
68	System shall allow users to save, export, print and share reports		

Appendix III Building Asset Management System -Secondary Requirements

Instructions: If your solution completely meets the identified requirement description, place a Y in the adjoining cell in the **INCLUDED (based functionality)** column. If your solution does not meet the identified requirement description, place a N in the column; in addition, place either a Y or a N on either or both **Optional Functionality (not available in based functionality but can be made available under different module, functionality or software)** and **Customization (will require new specifications and development)** columns. If the proposed solution does not satisfy the requirements in full in the "vanilla" version, complete the **COMMENT** column and indicate any solution available or tailoring, customization or other software required along with an indication of additional costs, if any.

LINE #	SECONDARY (OPTIONAL) REQUIREMENTS				
	Description	INCLUDED (base functionality) Y or N	Optional functionality Y or N	Customization Y or N	COMMENTS
	PART E - ASSET MANAGEMENT The system shall have the following capabilities:				
1	Ability to assign assets to a work order				
2	Ability to quickly create work order from asset				
3	System supports asset tagging and scanning with mobile app				
4	Ability to take meter readings				
5	Allows for asset barcoding				
6	Supports label printing				
7	Ability to place assets on a floorplan/drawing				
8	Ability to track Warranty information of all assets				
	PART I - REPORTING The system shall have the following capabilities:				
9	Ability to report on purchase order summary				
10	System shall include user configurable dashboards by security role (e.g. admin, branch/division/unit lead, tradesperson) that includes Work Orders, Service Level Agreements and Preventative Maintenance.				
	PART J - WORK ORDER MANAGEMENT The system shall have the following capabilities:				
11	System allows requesters to search existing work orders for problem type, trade, etc. when submitting work orders				
12	Ability to archive WRs with all relevant data, e.g. internal notes, attachments (for user defined period)				
13	Ability to receive service requests from desktop or mobile devices				
14	Ability to link a service request to an asset or event				
15	Provide the ability to approve or deny a service request				
16	Contain work request forms to capture critical information				
17	Provide work request forms with custom fields				
18	Ability to capture requestor information on form				
19	Ability to associate multiple work orders				
20	Ability to connect to Sites, Locations, Assets, and other source types				
21	Ability to create custom fields				
22	Ability to assign work to multiple staff				
23	Ability to include notes / comments on work order				
24	Ability to attach photos, manuals and other documents				
25	Ability to assign priority to a work order or work request				
26	Ability to assign a Cost Center to a work order or work request				
27	Ability to export work orders with batch updates				
28	Ability to automatically route work orders to an individual or branch/division/unit based on request type				
29	Ability to add/ assign parts to a work order				
30	Ability to issue purchase orders				
31	Ability to batch re-assign work and ticket statuses				
32	Ability to cost summarize filtered on screen work order results				
	PART K - PREVENTATIVE MAINTENANCE SCHEDULING The system shall have the following capabilities:				
33	Ability to create, manage and control preventative maintenance schedules				
34	Ability to schedule preventative work on a recurring basis (monthly, quarterly, etc.)				
35	Ability to generate preventative work based on meter readings				
36	Ability to have some type of work load planner with Drag and Drop functionality				
37	Ability to tie a Preventative Maintenance to a particular asset or piece of equipment				
38	Ability to set minimum and maximum thresholds on meters to trigger preventative maintenance				

39	Provide Preventative Maintenance templates for scheduling				
40	Ability to view scheduled work orders in a calendar view				
41	Ability to assign parts and personnel to scheduled work				
42	Ability to attach documents to a scheduled work order				
43	Ability to generate labour and materials cost reports				
44	Ability to use captured data from work orders to report on cost data for individual or multiple branches/divisions/units				
45	Ability for unit supervisors to validate work hours				
46	Ability to duplicate, delete or disable scheduled preventative maintenance				
47	Provide Preventative Maintenance Summary report				
	PART L - WORK ORDER REPORTING The system shall be capable of reporting on the following:				
48	Open vs. Completed Work Orders				
49	Actual vs. Estimated Costs and Hours				
50	Category Comparison				
51	Completed On Time/Late Summary				
52	Branch/division/unit Summary				
53	Downtime Analysis				
54	Labour by Type				
55	Labour Cost				
56	Labour Cost by Branch/Division/Unit				
57	Labour Costs by User				
58	Labour Cost Detail				
59	Labour Time Detail				
60	Mean Time to Repair Analysis				
61	Mean Time to Repair Comparison				
62	Part Usage By Asset				
63	Part Usage by Location				
64	Part Usage by Part				
65	Part Usage by Site				
66	Work Order Summary				
	PART M - PARTS MANAGEMENT The system shall have the following capabilities:				
67	System must have the ability to pull inventoried parts and assign them to work orders				
68	Transactions including parts must influence recorded stock levels				
69	System must track storage location of inventoried parts				
70	System must track parts manufacturers and suppliers				
71	System must allow for batch update of parts & import/export of parts				
72	System must allow users to print QR codes, barcodes, labels, etc.				
73	Generate parts category valuation report				
74	Generate report showing parts inventory on hand				
75	Generate part summary report				
76	Generate part transaction report				
77	Generate report on part use				
78	Generate report showing parts on back order				
79	System must also be capable of tracking inventory of plants in the Toronto Zoo's greenhouse and on site.				
	PART N - PURCHASE ORDERS The system shall have the following capabilities:				
80	Create purchase orders from inventoried and non-inventoried items				
81	Email Purchase Orders				
82	Duplicate/ Delete Purchase Orders				
83	Batch update Purchase Orders				
84	Print/ Batch Print Purchase Orders				
	PART O - MOBILE SUPPORT The system shall have the following capabilities:				
85	Accessible from Android and iOS (mobile)				
86	Provide a mobile computing option				
87	Ability to access work order management through mobile devices (e.g. Apple & Android phones/tablets)				
88	Ability to create, update and close work orders in mobile view				
89	Ability to execute workflow approvals through mobile view				
90	Barcode/QR scanning				
91	Ability to execute tasks in offline mode				
92	Map-based service request and work order generation				
93	Ability to attach images/photos to asset/work order				
94	Link to GIS Assets				
95	Easy work order creation				
96	Capture employee device location				
	PART P - GIS The system shall have the following GIS interface capabilities:				

97	Integration to ArcGIS Server OR Ability to Host GIS Data on Entity's behalf				
98	Display all GIS layers with ability to search and toggle layer visibility				
99	Synchronization with GIS-based asset registry				
100	Map-based service request and work order generation				
101	Access GIS mapping in the field				
102	Access data referenced by hyperlinks in GIS data				
103	Manage PM schedules through GIS				
104	Addressing and ESRI geocode service support				
105	View current and historic employee device locations				
106	Measure tools				

RFP 48 (2019-09) - APPENDIX IV
Building Inventory
2019-08-20

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N	Comments
<u>MAIN GATE AREA</u>						
VS0000	Member & Guest Centre (incl. Generators, Washrooms, Storage Area)	9,500	883	1974	partial	
VS1000	Greenhouse Giftshop	1730	161	1986	N	
VS0600	Peacock Café/Tim Hortons				Y	
ZS0000	Education/Retail Centre	13,000	1208	1986	Y	
<u>DISCOVERY ZONE</u>						
CZ0000	Bird Barn Holding	1760	164	1988	N	
DZ0210	Splash Island Change/Mechanical	1705	158	2002/11	Partial	Family Washroom 2011
DZ0300	Washrooms	1330	124	2003	Y	
DZ0400	Waterside Holding	1140	106	2003	N	
DZ0800	Goat & Pig Holding	290	27	2003	N	
EC0000	Portable Classroom	1,765	164	2003	Y	
<u>INDO-MALAYA</u>						
IN0000	Indo-Malaya Pavilion	28,800	2676	1974	Y	
IR0000	Indian Rhino Holding	7,200	669	1981	Y	
IP0100	Himalayan Tahr Holding	384	36		Y	
MW0000	Malayan Woods Pavilion	5,000	465	1974	Y	
MO0000	Canopy Classroom	1,000	93	1974	Y	
IP0300	Lion-Tailed Macaque Holding	1,100	102	1974	partial	
IN1700	Sumatran Tiger Holding	645	60	1984/02	N	Expanded 2002
<u>AFRICA</u>						
FC0000	First Aid Centre	780	72	1974	Y	
AF0000	African Rainforest Pavilion	46,440	4314	1974/00	Y	Gorilla Expansion 2000
EH0100	Hippo Holding	6,145	571	1974	N	
EH0200	Giraffe Holding	11,000	1022	1974/98	partial	Expansion 1998-To be renovated for Giraffes in 2014.
AN0100	Penguin Holding	1,843	171	2011	partial	Exhibit/Winter Viewing

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N	Comments
AN0200	Hyena Holding	1,000	93	1986	N	
AN0300	Crested Porcupine Holding	330	31	1974	N	
AN0400	Vacant Holding	695	65		N	
AN0700	Ostrich & Wildebeast Holding	600	56	2012	N	
AS1000	Rhino/Hoofstock Holding	8970	833	1998	N	
AS1100	Bird/Hoofstock Holding	6400	595	1998	N	
AS1200	Cheetah Holding	1645	153	1998	N	
AS1300	Baboon Holding	1325	123	1998	N	
AS1400	Lion Holding	1525	142	1998	N	
AF4000	Africa Restaurant and Washrooms	7,748	720	1974/08	Y	Covered Seating 2008, to be expanded in 2015
AS1902	Maridadi Duka	200	19	1998	N	
AS1903	Thorntree Café	60	6	1998	N	
AS1904	Kesho Park Headquarters	200	19	1998	Y	
AS2000	Simba Safari Snack Bar/Washrooms	2665	248	1998	partial	
AS2100	Savanna Shop	1120	104	2002	partial	
AS2105	Africa Zoomobile Shelter	845	79		Y	
AF4101	Africa Picnic Shelter	701	65		Y	
AS1700	Serengeti Bush Camp Shelter	709	66		Y	
AS1601	Savanna Picnic Shelter					
	<u>CANADIAN DOMAIN</u>					
CD0100	Waterfowl House & Viewing Shelter	980	91	1976	Y	
CD0200	Raccoon Shelter	250	23	1974	N	
CD0600	Grizzly Bear Holding	350	33	1976	N	
CD0700	Moose Holding	1,300	121	1976	N	
CD0900	Wolf Shelter	375	35	1974	N	
CD1700	Weston Station/Washrooms	1,900	177	1976	Y	
CD1800	Canadian Domain Zoomobile Shelter/Washrooms	1,235	115	1974	partial	
	<u>AMERICAS</u>					
AM0000	Americas Pavilion	18,475	1716	1974/02	Y	Keeper Room Expansion 2002
MA0000	Mayan Temple Holding	4,000	372	1986	N	
TT0100	Polar Bear Holding	3,738	347	1974/09	partial	New Holding 2009
TT0700	Polar Bear Viewing Shelter	516	48	2009	Y	
TT0300	Reindeer Holding	600	56	2009	N	
TT0500	Arctic Fox Holding	324	30	2009	N	
TT0600	Wolf Holding	678	63	2009	N	
TT0400	Snow Goose Holding	396	37	2012	N	
AP0500	Caribou Café	5,920	550	1974	Y	Covered Seating 2009 & 2016

SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N	Comments
AP0600	Beaver Tails	200	19	2002	N	
AP0601	Tim Hortons	200	19	2002	Y	
AP0602	Americas Zoomobile Station					
TTX	Tundra Show Control E	100	9	2019	N	
<u>OUTDOOR HOLDING</u>						
OH0100	Cheetah Holding #1	400	37	1974	N	
OH0200	Cheetah Holding #2	200	19	1974	N	
OH0900	Keeper Office	279	26			
OH1000	Horticulture Storage Shed	1258	117			
<u>OPERATIONS COMPLEX</u>						
HS0100	Hay Shed	1,950	181	1974	N	
TR0000	Vehicle Maintenance Centre	10,800	1003	1974/94	N	
AD0000	Administrative Support Centre	34,122	3170	1974	Y	
QW0000	Quarantine	4,876	453	2007	N	
IH0000	Invertebrate House (Small Finished Building)	1,840	171		N	
CU0000	Conservation, Education & Research Centre	8,633	802		N	
NS0000	Facilities & Services Centre	30,408	2825	1994	N	
GR0000	Horticulture Centre	21,240	1973	1994	N	
WH0000	Wildlife Health Centre	42,434	3942	2016	partial	
<u>AUSTRALASIA/EURASIA</u>						
AU0000	Australasia Pavilion	19,280	1791	1974	Y	Renovated 2007
EP0100	Wisent Holding	420	39	1975	N	
EP0300	Dhole Holding	1,100	102	1985	N	
EP0400	Barbary Ape Holding	900	84	1974/89	N	
EP0500	Przewalski's Horse Holding	1,065	99	1988	N	
EP0600	Camel Holding	3,660	340	1987	N	
EP1400	Red Panda Holding	375	35	1992	N	
EP1500	Dromedary Camel Holding	575	53	1975	N	
EP1600	Mouflon Holding	800	74	1987	N	
EP1800	Yak Holding	1,150	107	1975	N	
EP2000	Eurasia Keeper Facilities	1,400	130	1974	partial	
EP2050	Former Eurasia Zoomobile Shelter	650	60	2002	Y	
EP2060	Eurasia Gift Shop	925	86	2013	Y	
EP2070	Pizza Pizza	396	37	2013	N	
EP2080	Washroom	197	18	2013	Y	
EP2100	Barbary Sheep Holding	1,000	93	1999	N	
EP2400	Dr Schofield Filtration	196	18	2011	N	

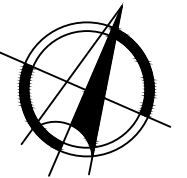
SIC	AREA / Building Name	Bldg. Size (sq.ft)	Bldg. Size (sq.m)	Year of Const.	Public Access Y/N	Comments
EP2500	Amur Tiger Holding	2970	276	2013	N	
EP2510	Amur Tiger View Shelter	280	26	2013	Y	
EP2600	Snow Leopard / Bird Holding	1847	172	2013	N	
<u>NORTH & EAST BUILDINGS</u>						
BH0000	Block House	400	37	1936	N	
BF0000	Black-footed Ferret Holding	600	56		N	
MC0000	Marmot Holding	1800	167		N	
GA0000	Gate House	900	84	1936	N	
VH0000	Valley Halla	7400	687	1936	partial	
MB0000	Main Barn	2000	186		N	
PH0000	Pearse House	1600	149		Y	
FI0000	Finch Barn	1200	111		N	
PS0000	Potting Shed	353	33		N	
DS0000	Drive Shed	1956	182		N	
TOTAL AREA (sq.ft.)		436,667				
TOTAL NUMBER OF BUILDINGS			104			



361A OLD FINCH AVE.
TORONTO, ON
M1B 5K7

NO.	DESCRIPTION	DATE
0	FOR TENDER	2019-08-19

NO.	REVISIONS	DATE
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BUILDING AUDIT

APPROVED BY
NAME:

DATE:

SITE PLAN

PROJECT #:

DRAWN BY:

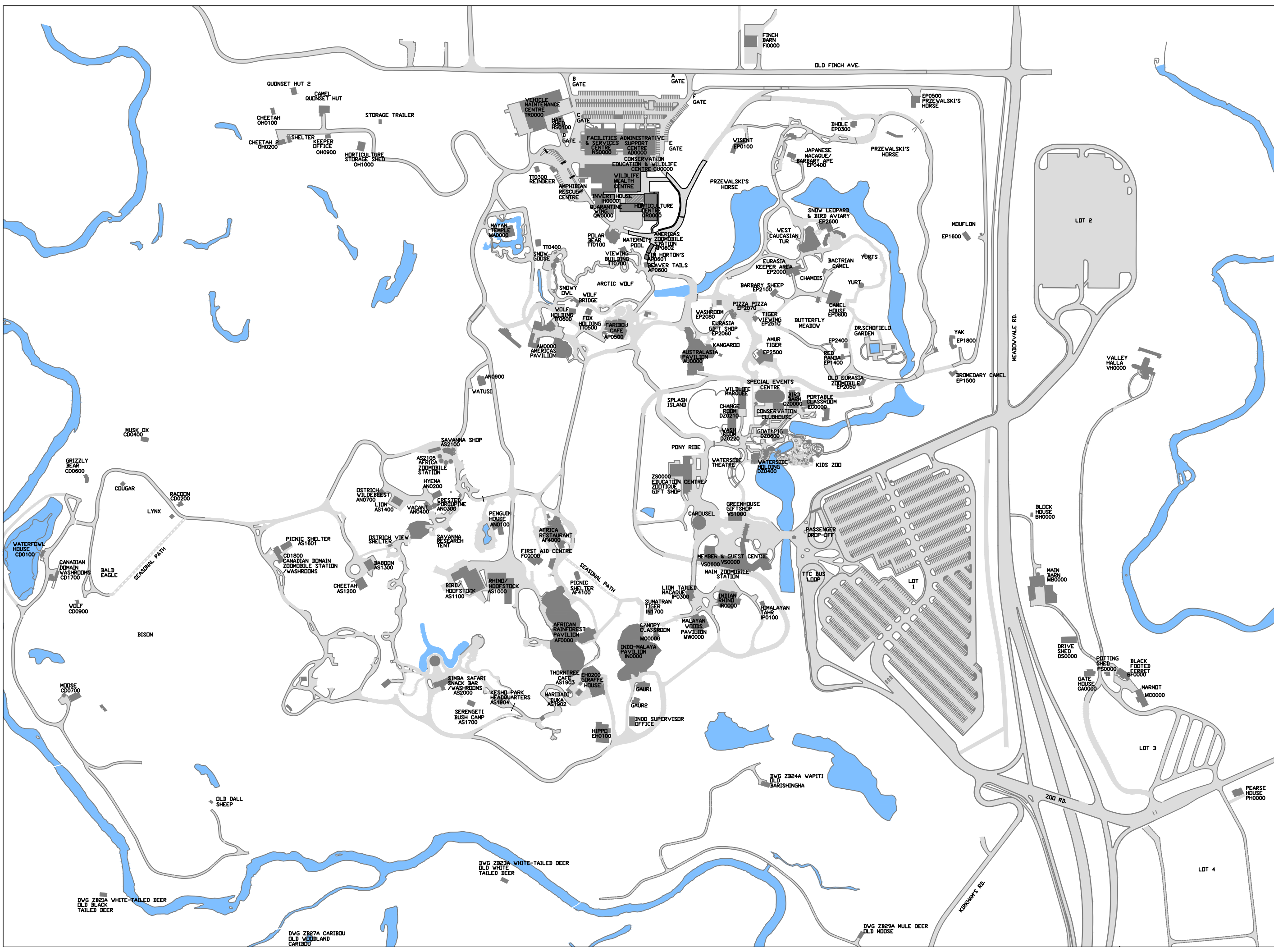
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SCALE:

DRAWING #:

R1





**361A OLD FINCH AVE.
TORONTO, ON
M1B 5K7**

MAIN GATE AREA

VS0000 MEMBER & GUEST CENTRE
(INCL. GENERATORS, WASHROOMS, STORAGE AREA)
VS1000 GREENHOUSE GIFTSHOP
VS0600 PEACOCK CAFE
ZS0000 EDUCATION/RETAIL CENTRE

DISCOVERY ZONE

CZ0000 BIRD BARN HOLDING
DZ010 SPLASH ISLAND CHANGE/MECHANICAL
DZ020 WASHROOMS
DZ0400 WATERSIDE HOLDING
DZ0600 GOAT & PIG HOLDING
EC0000 PORTABLE CLASSROOM

INDO-MALAYA

IN0000 INDO-MALAYA PAVILION
IR0000 INDIAN RHINO PAVILION
IP0100 HIMALAYAN TAHR HOLDING
MN0000 MALAYAN WOODS PAVILION
MO0000 CANOPY CLASSROOM
IP0300 LION-TAILED MACAQUE HOLDING
IN1700 SUMATRAN TIGER HOLDING

AFRICA

FC0000 FIRST AID CENTRE
AF0000 AFRICAN RAINFOREST PAVILION
EH0100 HIPPO HOLDING
EH0200 GIRAFFE HOLDING
AN0100 PENGUIN HOLDING
AN0200 HYENA HOLDING
AN0300 CRESTED PORCUPINE HOLDING
AN0400 VACANT HOLDING
AN0700 OSTRICH & WILDEBEAST HOLDING
AN0900 WATUSI HOLDING
AS1000 RHINO/HOOFSTOCK HOLDING
AS1100 BIRD/HOOFSTOCK HOLDING
AS1200 CHEETAH HOLDING
AS1300 BABOON HOLDING
AS1400 LION HOLDING
AF4000 AFRICA RESTAURANT AND WASHROOMS
AS1901 MARIDADI DUKA
AS1903 THORNTREE CAFE
AS1904 KESHO PARK HEADQUARTERS
AS2000 SIMBA SAFARI SNACK BAR/WASHROOMS
AS2100 SAVANNA SHOP
AS2105 AFRICA ZOOMOBILE SHELTER
AF4100 AFRICA PICNIC SHELTER
AS1700 SERENGETI BUSH CAMP SHELTER
AS1601 SAVANNA PICNIC SHELTER

CANADIAN DOMAIN

CD0100 WATERFOWL HOUSE & VIEWING SHELTER
CD0200 RACCOON SHELTER
CD0600 GRIZZLY BEAR HOLDING
CD0700 MOOSE HOLDING
CD0900 WOLF SHELTER
CD1700 WESTON STATION/WASHROOMS
CD1800 CANADIAN DOMAIN ZOOMOBILE SHELTER/WASHROOMS

AMERICAS/TUNDRA TREK

AM0000 AMERICAS PAVILION
MA0000 MAYAN TEMPLE HOLDING
TT0100 POLAR BEAR HOLDING
TT0700 POLAR BEAR VIEWING SHELTER
TT0300 REINDEER HOLDING
TT0500 ARCTIC FOX HOLDING
TT0600 WOLF HOLDING
TT0400 SNOW GOOSE HOLDING
AP0500 CARIBOU CAFE
AP0600 BEAVER TAILS
AP0601 TIM HORTONS
AP0602 AMERICAS ZOOMOBILE STATION

OUTDOOR HOLDING

OH0100 CHEETAH HOLDING #1
OH0200 CHEETAH HOLDING #2
OH0900 KEEPER OFFICE
OH1000 HORTICULTURE STORAGE SHED

OPERATIONS COMPLEX

HS0100 HAY SHED
TR0000 VEHICLE MAINTENANCE CENTRE
AD0000 ADMINISTRATIVE SUPPORT CENTRE
QN0000 QUARANTINE
IH0000 INVERTEBRATE HOUSE (SMALL FINISHED BUILDING)
CU0000 CONSERVATION EDUCATION & RESEARCH CENTRE
NS0000 FACILITIES & SERVICES CENTRE
GR0000 HORTICULTURE CENTRE
WH0000 WILDLIFE HEALTH CENTRE

AUSTRALASIA/EURASIA

AU0000 AUSTRALASIA PAVILION
EP0100 WISENT HOLDING
EP0300 DHOLE HOLDING
EP0400 BARBARY APE HOLDING
EP0500 PRZEWALSKI'S HORSE HOLDING
EP0600 CAMEL HOLDING
EP1400 RED PANDA HOLDING
EP1500 DROMEDARY CAMEL HOLDING
EP1600 MAULON HOLDING
EP1800 YAK HOLDING
EP2000 EURASIA KEEPER FACILITIES
EP2050 FORMER EURASIA ZOOMOBILE SHELTER
EP2060 EURASIA GIFT SHOP
EP2070 PIZZA PIZZA
EP2080 WASHROOM
EP2100 BARBARY SHEEP
EP2400 DR. SCHOFIELD FILTRATION
EP2500 AMUR TIGER HOLDING
EP2510 AMUR TIGER VIEW SHELTER
EP2600 SNOW LEOPARD/BIRD HOLDING

NORTH & EAST BUILDINGS

BH0000 BLOCK HOUSE
BF0000 BLACK-FOOTED FERRET HOLDING
MC0000 MARMOT HOLDING
GA0000 GATE HOUSE
VH0000 VALLEY HALLA
MB0000 MAIN BARN
PH0000 PEARSE HOUSE
FI0000 FINCH BARN
PS0000 POTTING SHED
DS0000 DRIVE SHED

NO.	DESCRIPTION	DATE
0	FOR TENDER	2019-08-19

NO.	REVISIONS	DATE
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BUILDING AUDIT

APPROVED BY
NAME:

DATE:

BUILDING LEGEND

PROJECT #:

DRAWN BY:

CHECKED BY:

DATE:

SCALE:

DRAWING #:

R1