



Request for Information for Utility Rate Review and Rate Model Development Services

Request of Proposals No.: RFI 2026-01

Issued: July 3, 2026

Submission Deadline: **August 10, 2026, 12:00 noon Alberta Time.**

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Posted to: Alberta Purchasing Connect at www.purchasingconnection.ca
Town of Crossfield website at www.crossfieldalberta.com/p/opportunities

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1.0 INTRODUCTION

The Town of Crossfield is issuing this Request for Information ("RFI") to gather information from qualified consulting firms regarding the provision of Utility Rate Review and Rate Model Development Services.

This RFI is intended solely for information gathering and budgetary planning purposes. It is not a formal procurement process, Request for Proposal ("RFP"), or Request for Tender, and no contract will result from this process.

The Town is seeking information regarding:

- Consultant qualifications and experience;
- Available methodologies and approaches;
- Typical project timelines;
- Recommended deliverables;
- Indicative budget estimates; and
- Industry best practices related to utility rate reviews and long-term rate modeling.

Responses received through this RFI may assist the Town in determining project scope, procurement strategy, and future budget requirements. Respondents are encouraged to provide candid and detailed information; responses will be used internally and will not be shared publicly or attributed to individual firms without consent.

2.0 BACKGROUND

The Town of Crossfield is a rapidly growing community with a strong industrial base, located approximately 50 km north of Calgary, Alberta, along Highway 2A. The Town has experienced annual population growth of approximately 4% to 5% in recent years and had a population of 4,211 as of 2024.

The Town operates municipal utility systems that include water distribution, wastewater collection and treatment and stormwater infrastructure and management.

The Town is considering undertaking a comprehensive review of utility rates and the development of a long-term utility rate model to support:

- Financial sustainability;
- Infrastructure renewal and replacement;
- Operational cost recovery;
- Growth-related infrastructure planning;
- Reserve funding strategies; and
- Equitable user-pay principles.

The Town anticipates that the project may include review and analysis of:

- Existing utility rate structures;
- Operating and capital expenditures;
- Utility reserves and debt obligations;
- Consumption trends and customer classes;
- Asset management and tangible capital asset data;
- Growth projections; and
- Long-term infrastructure funding requirements.

A. Financial Context

To assist respondents in developing meaningful budgetary estimates, the following context is provided. These figures are approximate and for scoping purposes only:

- Annual utility revenues (2025):
 - Water - \$1.372M
 - Wastewater - \$1.068M
 - Stormwater – not currently included in utility rates
- Total utility customer accounts:
 - Residential – 1,563
 - Commercial - 80
 - Industrial - 78
- Current rate structure (rates per month):

Service Description	Residential/Commercial	Industrial
Water Services		
Flat Rate up to \$11.35 m ³	\$33.94	\$41.92
Consumption over minimum (per m ³)	\$4.69	\$5.23
Wastewater Services	<i>75% water charges levied</i>	<i>95% water charges levies</i>
Flat Rate up to \$11.35 m ³	\$25.46	\$39.82
Consumption over minimum (per m ³)	\$3.52	\$4.97

- Outstanding utility-related debt: approximately \$2.27M, expires June 2032
- Annual utility-related debt service cost: \$386K
- No formal review of water or wastewater rates has been completed to date.

B. Data Availability

Respondents should be aware of the following regarding the Town's available data and systems:

- Financial management system: Catalis Financial System
- Utility billing and consumption data is available and can be readily exported to the successful proponent in Excel format
- Asset management plan is currently under development
- Utility asset inventory data (pipe length, materials and ages by system) is captured in GIS

Asset Category	Total Length	Length by Diameter(mm)			
Water Distribution Mains	30.1 KM	75	909.1m	250	8,797.1m
		100	252.0m	300	1,475.1m
		150	9,473.1m	400	792.6m
		200	7,912.1m		
Wastewater Mains	32.4 KM	100	456.9m	375	159.5m
		150	1,756.6m	525	26.5m
		200	14,576.2m	600	820.0m
		250	6,827.2m	Unknown	5,380.0m
		300	1,934.7m		

Asset Category	Total Length	Length by Diameter(mm)			
Stormwater Mains	8.8 KM	100	15.1m	525	201.0m
		200	421.0m	600	865.0m
		250	775.0m	675	750.0m
		300	1,043.7m	750	567.0m
		350	228.3m	800	64.5m
		375	750.8m	900	301.0m
		400	264.7m	1000	37.2m
		450	1,535.6m	1050	111.1m
		500	196.0m	1700	18.4m

- There is no existing utility rate model
- Capital plans and budgets are available for review
- Water and Wastewater Master plans, developed in 2020 available for review. Infrastructure Master Plan updates are planned for 2026. www.crossfieldalberta.com/p/municipal-plans
- Comprehensive off-site levy update to follow in 2027.

Respondents are encouraged to identify any additional data requirements or potential data gaps as part of their response.

3.0 OBJECTIVE

Through this Request for Information, the Town aims to:

- Identify firms with relevant municipal utility rate review experience;
- Understand available approaches and methodologies;
- Obtain budgetary pricing estimates;
- Determine appropriate project scope and deliverables;
- Gather recommendations regarding timelines and implementation strategies; and
- Assess market interest and consultant availability.

The Town's primary drivers for this project are financial sustainability and equitable cost recovery in the context of sustained growth. In particular, the Town is interested in understanding how utility rates can be structured to fairly recover growth-related infrastructure costs, adequately fund reserves, and remain competitive and transparent for existing ratepayers. Respondents who have experience addressing similar challenges in growing Alberta municipalities are encouraged to highlight that experience.

4.0 FUTURE SCOPE OF WORK

The Town anticipates that a future project may include some or all the following components. Respondents are encouraged to comment on scope, phasing, or sequencing recommendations.

A. Data Collection and Review

- Review of existing utility bylaws, rates, and fee structures for water and wastewater;
- Review of utility billing and consumption data by customer class;
- Review of operating and capital budgets;
- Review of asset management plans and infrastructure data;
- Review of reserve funding strategies and debt obligations;

- Assessment of off-site levy or growth cost recovery frameworks currently in place;
- Identification of data gaps and information requirements; and
- Review growth projections and capital planning assumptions.

B. Utility Rate Analysis

- Evaluation of existing utility revenues and expenditures;
- Assessment of cost recovery levels;
- Review of customer classes and allocation methodologies;
- Development of rate structure alternatives;
- Evaluation of fixed versus variable rate components; and
- Benchmarking against comparable municipalities.

C. Utility Rate Model Development

The Town is seeking the development of a long-term utility rate model with the following anticipated characteristics:

- Planning horizon: 10 years is anticipated — respondents are encouraged to recommend an appropriate horizon
- Utilities in scope: water, wastewater, and stormwater
- Forecasting revenues, expenditures, and reserve balances;
- Integration of capital renewal and replacement planning;
- Scenario analysis and sensitivity testing (respondents are encouraged to describe typical scenario types and the number of scenarios included in their standard approach);
- Development of recommended multi-year rate strategies; and
- Staff training on model use and maintenance.

The Town prefers a model developed in Microsoft Excel or another non-proprietary platform that can be maintained internally by Town staff without the need for ongoing consultant support. Respondents should clearly describe the platform and structure of their proposed model deliverable. Proprietary platforms may also be considered based on factors such as annual costs, complexity, functionality, and overall suitability.

D. Stakeholder Engagement

Depending on project scope, the Town may wish to include a public or stakeholder engagement component. Respondents are invited to describe their typical approach to engagement for a project of this nature, which may include:

- Council workshops (the Town anticipates at least two — one preliminary, one final);
- Online or written survey support;
- Preparation of public-facing communication materials (rate impact summaries, FAQ documents, etc.); and/or
- Presentation at a Council meeting to present utility rate recommendations.

Respondents should note which engagement components, if any, are included in their standard scope, and which would be considered optional add-ons that affect cost.

E. Reporting and Deliverables

Potential deliverables may include:

- Draft and final reports;
- Utility rate model with user documentation and training;
- Recommended rate schedules for each utility;
- Council presentation materials; and
- Public communication support materials.

5.0 REQUESTED INFORMATION

Respondents are requested to organize their submission using the section headings below. This structure will assist the Town in comparing responses. Submissions should be concise; the 15-page maximum applies to the full response.

A. Firm Profile

- Company overview;
- Office location(s), including the office that would lead this engagement;
- Number of staff; and
- Relevant municipal utility experience, with emphasis on Alberta municipalities.

B. Relevant Experience

Please provide three (3) examples of similar municipal utility rate review and/or utility model development projects completed within the past five (5) years, including:

- Client name and municipality size;
- Scope of work;
- Project value (optional);
- Completion date; and
- Key outcomes or deliverables, and lessons learned.

Respondents with experience working with growing Alberta municipalities, including projects involving off-site levy or growth cost recovery analysis, are encouraged to highlight that experience specifically.

C. Proposed Methodology

Please describe:

- Typical approach to utility rate reviews, including how you structure the work and engage with municipal staff;
- Methodologies used for cost allocation and rate design for water, wastewater, and stormwater;
- Approach to growth cost recovery and off-site levy analysis, if applicable;
- Experience with asset management integration;
- Recommended best practices relevant to a municipality of Crossfield's size and growth profile;
- Any unique tools, approaches, or proprietary frameworks utilized;

- Identify potential risks, constraints, or challenges that may affect the successful completion of the project; and
- Identify proposed mitigation strategies or recommended approaches to reduce or manage identified risks.

D. Rate Model Description

Please describe:

- The platform and general structure of your standard rate model deliverable;
- The planning horizon typically modelled;
- The number and type of scenarios typically included;
- Whether the model is a standard template adapted for each client, or custom-built;
- Any licensing, access, or maintenance considerations the Town should be aware of; and
- Your approach to model training and knowledge transfer to municipal staff.
- If a proprietary model is used, describe the cost, complexity and functionality of the model.

E. Project Team

Provide a brief overview of:

- Key personnel who would be assigned to this engagement;
- Relevant qualifications and designations; and
- Areas of expertise and specific roles on this project.

F. Estimated Timeline

Please provide:

- Typical project schedule to complete the scope;
- Key milestones and decision points; and
- Any factors that could accelerate or extend the timeline (e.g., data readiness, Council meeting schedule).

G. Budgetary Estimate

Provide a non-binding estimated fee range for a project of this nature, including:

- Total estimated fee range;
- Key assumptions underlying the estimate;
- Exclusions and items that would be billed separately; and
- Optional services or scope additions that may affect cost (e.g., additional engagement components, stormwater rate development, off-site levy analysis).

The Town acknowledges that estimates provided are preliminary only and based on limited available information. Respondents are encouraged to clearly state their assumptions so the Town can make meaningful comparisons.

H. Evaluation Criteria

While this is an information-gathering exercise rather than a formal procurement, the Town anticipates that a subsequent RFP, if issued, would evaluate submissions on factors including:

- Demonstrated experience with municipal utility rate reviews, particularly in Alberta;

- Methodology and approach;
- Demonstrated experience and approach to developing transparent, maintainable, and user-friendly utility rate models;
- Project team qualifications;
- Proposed timeline; and
- Fee competitiveness.

Respondents who wish to be considered for a future procurement process are encouraged to tailor their response accordingly.

I. Additional Recommendations

Respondents are encouraged to provide:

- Suggestions regarding project scope, phasing, or sequencing;
- Recommended deliverables not identified above;
- Common risks or challenges encountered in similar projects, and how they are managed;
- Emerging trends or industry best practices in utility rate modeling; and
- Any observations specific to a rapidly growing Alberta community like Crossfield.

J. Client References

Please provide at least two (2) references from municipalities or public sector clients who have contracted with your firm for similar utility rate services within the past five (5) years, including:

- Organization name and location;
- Name, title, and contact information of a person who may be contacted (with permission); and
- Date and brief description of work performed.

6.0 SUBMISSION INSTRUCTIONS

Information package specifically marked “**Utility Rate Review and Rate Model Development Services**” shall be received via email by the following:

Town of Crossfield, Attention Amber Ouellette,
1005 Ross Street, P.O Box 500, Crossfield, Alberta T0M 0S0

Submissions must be:

- Received electronically by Town of Crossfield by the stated closing time at ambero@crossfieldalberta.com.
- Or received electronically by submitting a USB Flash Drive within a clearly marked envelope to the Town office by the stated closing time.
- Acceptable submission formats include PDF or Word documents, maximum 15 pages
- Emailed submissions must be under 20 MB to be received.
- Late, faxed, or physical proposal packages will not be accepted.
- Prices to be quoted in Canadian dollars, excluding GST
- Submission Deadline: **August 10, 2026, at 12 noon Alberta time**

7.0 QUESTIONS AND CLARIFICATION

All inquiries pertaining to this RFI shall be directed in writing to Amber Ouellette at ambero@crossfieldalberta.com by **2:00 p.m. Alberta Time July 16, 2026**. Responses will be posted as addenda by 4:00 pm Alberta Time July 22, 2026.

It is the responsibility of the respondent to examine all the documents comprising this RFI and seek clarification or additional information on any matter it considers to be unclear. No verbal responses or interpretations shall be binding on the Town.

8.0 DISCLAIMER

This Request for Information (RFI) is issued for the purpose of gathering information to assist the Town of Crossfield in understanding available utility rate review and rate model development services. This RFI does not constitute a solicitation or a promise to issue any subsequent procurement process such as a Request for Proposal (RFP), nor will it result in the award of any contract.

Responding to this RFI is entirely voluntary and does not entitle any vendor to any contractual or other rights with the Town. The Town will not reimburse any costs incurred by vendors in responding to this RFI or in participating in any follow-up meetings or discussions.

The Town reserves the right to use or not use any of the information received and may proceed with a separate and competitive procurement process at its sole discretion. Any future procurement will be subject to its own terms and conditions, and vendors will be required to formally respond to any subsequent RFP, RFQ, or other solicitation if they wish to be considered.

Protection of Privacy Act (POPA): All submissions become the property of the Town, and as such are subject to the provisions of the Protection of Privacy Act. Submitters who wish to ensure particular parts of their submission are protected from disclosure under the Act should specifically identify any information provided with their submission that constitute trade secrets, and that are supplied in confidence, and the release of which could significantly harm their competitive position. Information that does not meet all three of the foregoing categories may be subject to disclose to third parties. Please refer to the Protection of Privacy Act for further information.