



City of Coquitlam

**REQUEST FOR PROPOSALS
RFP No. 14-01-11**

**Consulting Services for
CORPORATE SPONSORSHIP ASSET
INVENTORY & VALUATION**

**Proposals will be received on or before 2:00 pm local time
Wednesday, February 19, 2014
(Closing date and time)**

Obtaining RFP Documents

RFP Documents are available for downloading from the City of Coquitlam's website:
www.coquitlam.ca/BidOpportunities

Printing of RFP documents and drawings is the sole responsibility of the Proponents.

Addenda

Proponents are required to check the City's website for any updated information and addenda before the closing date at the City website: www.coquitlam.ca/BidOpportunities

Proposals Submissions

The City reserves the right to accept or reject any or all Proposals or accept a Proposal deemed to be in the best interest of the City.

The City will not be responsible for any costs incurred by Proponents in preparing a response.

D. Trudeau
Purchasing Manager

Issue Date: January 28, 2014

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DEFINITIONS

“City” “Owner” means City of Coquitlam.

“Agreement” “Contract” means the contract for services or Purchase Order (PO) issued to formalize the accepted Proposal.

“Consultant” means the person(s), firm(s), or corporation(s) appointed by the City to carry out all duties, obligations, work and services described in the Request for Proposal and all associated documentation, which may also include mutually agreed revisions subsequent to the submission of a Proposal. Both “Consultant” and “Proponent” are complementary in terms of duties, obligations and responsibilities at the Request for Proposal stage, through evaluation process, execution and delivery of the services.

“Project Manager” means City staff member responsible for coordination of the Services with the City being provided by the Consultant.

“Proponent” means responder to this Request for Proposal.

“Proposal” means the submission by the Proponent.

“RFP” “Request for Proposals” shall mean and include the complete set of documents, specifications, drawings and addenda incorporated herein, and included in this Request for Proposal.

“Services” means and includes the provision by the successful Proponent of all services, work, duties and expectations as further described in this RFP. This will also mean the whole of the work, tools, materials, labour, equipment, travel, and all that is required to be completed and furnished by the Consultant.

Request for Proposals Corporate Sponsorship Asset Inventory and Valuation

The City of Coquitlam (“City”) requests Proposals from qualified and experienced Consultants to provide **Corporate Sponsorship Asset Inventory and Valuation**.

1.0 Project Purpose and Objectives

The City has long been interested in finding alternative revenue sources to help fund its infrastructure as well as offset costs or enhance its programs, services, festivals and events.

The City currently has a limited sponsorship program and is seeking to expand its corporate partnerships by leveraging its assets for marketing and sponsorship purposes. The first step in this process is to develop a master list of City assets that could be leveraged for sponsorship and marketing opportunities.

The asset inventory would identify municipal programs, services, facilities, events and other marketing assets and provide a fair market value based on the audience that is reached through these sponsorship properties and other identified tangible and intangible benefits. Based on this master list, the City will then develop a strategy to implement its sponsorship program in a phased approach.

2.0 Scope of Services

This project requires a qualified, experienced Consultant to develop a master inventory of City facilities, programs, services, events and other assets which could be leveraged for the City’s sponsorship program and determine the fair market value of these assets.

The Services include but are not limited to:

Phase 1 – Asset Inventory and Valuation

A table that identifies all sponsorship assets and provides the fair market value of those assets. These may include but are not limited to:

- Facilities appropriate for naming rights and sponsorship;
- Specific or bundled programs that could be targeted for sponsorship;
- City events that could be targeted for sponsorship;
- Publications that could be marketed for additional advertisement revenues;
- Virtual assets that could be used to promote sponsors (website, social media, mobile app’s, etc.);

- Other opportunities which should be marketed to make full use of the City's assets.

In addition, the table will be accompanied with a report that includes an explanation of the methodology used to determine the value of the assets as well as identify sponsorship properties that could be readily targeted for sponsorship in the short-term.

Phase 2 – Optional Additional Services

At the City's sole discretion, this RFP may also be used to establish a preferred Consultant for additional services in future phases. Alternatively, the City may request proposals from selected companies only, or issue a new RFP for additional services.

Additional services that may be considered for Phase 2 include:

- Recommend overall positioning of the program and 3 to 5 year sales strategy.
- Identify top prospects for sponsorship and advertising opportunities.
- Assist with implementing, marketing, sales and servicing of one or more of the sponsorship and advertising opportunities.
- Assist in the development of sponsorship and benefits packages for one or more of the sponsorship properties.
- Develop a clear, easy to understand sponsorship and advertising agreement template that could be used between a sponsorship and/or advertising proponent and the City.

3.0 Project Deliverables

The Consultant is required to develop:

- Audit and value the City programs, services, events, facilities, advertising and other sponsorship assets
- Provide a total asset inventory and valuation report.
- Identify those assets which are most easily marketable to the sponsorship community and could be marketed in the short-term.

4.0 Project Organization and Management

The City's key staff contact will be the City's Manager of Corporate Planning. The Manager will solicit feedback from key staff at each phase of sponsorship development and may involve a small group of additional staff in meetings with the Consultant.

5.0 Schedule

The preliminary schedule, milestones of the project, and associated deliverables are as follows:

Completion Date	Task
January 29, 2014	Issue RFP
February 19, 2014	Closing Date for Proposals
March 5, 2014	Consultant Selection
March 11, 2014	Start-Up Meeting
April 30, 2014	Audit, Analysis and Opportunities Report to City

6.0 Budget

Budget information will not be provided. Proponents should describe in their proposed schedule of fees and expenses how the efforts of the Proponent team shall be employed and also describe the time allocation of various professionals to the work tasks proposed. Neither the lowest price nor any proposal may be selected.

7.0 Instructions to Proponents

The Proponent is required to create a project team with the appropriate skill sets and expertise to carry out the work as identified in this RFP. Changes to the project team must be approved by the Project Manager.

7.1 Cost of Proposal

The City will not assume any responsibility or liability for any costs incurred by the Proponent in the preparation of a Proposal.

7.2 No Claim

Except as expressly and specifically permitted in this RFP, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in this RFP including accepting a non-compliant bid, and by

submitting a Proposal, each Proponent shall be deemed to have agreed that it has no claim.

No contractual, tort, or other legal obligations are created or imposed on the City, or any other individual, officer, or employee of the City with respect to the RFP documentation or by submission or consideration by the City of any Proposal.

7.3 Acceptance of Proposal

The City reserves the right to waive formalities in, accept or reject any or all Proposals, or accept the proposal deemed most favourable in the interests of the City. The City is under no obligation to proceed with the RFP and, should it decide to abandon the same, it may, at any time, invite further proposals or such other submissions for the provision of the services, or enter into any discussions or negotiations with any party for the provision of such services. No alterations, amendments or additional information will be accepted after the closing date and time unless invited by the City. The City, at its sole discretion, reserves the right to cancel this RFP at any time.

7.4 All Proposals Public

All Proposals submitted to the City will be received and held in confidence and will become the property of the City.

The City is bound by the provisions of the Freedom of Information and Protection of Privacy Act. Proponents submitting proposals are advised that such proposals may be treated as public documents, and the contents of the same may be disclosed upon written request, if required to do so pursuant to the Act.

7.5 Closing Date

Proposals will be received by the City on or before 2:00 pm local time

Wednesday, February 19, 2014

(Closing date and time)

7.6 Instructions for Proposal Submission

Proposal submissions are to be uploaded through Qfile, the City's file transfer service accessed at website:

<http://qfile.coquitlam.ca/bid>

1. in the “Subject” field enter: RFP Number and Name
2. Add files in .pdf format and Send (ensure you receive 2 emails from Qfile to confirm upload is complete)

Proponents are to allow ample time to complete the submission process. For assistance Ph: 604-927-3060 or Fax: 604-927-3035.

Proposals submitted shall be deemed to be successfully received when displayed as new email in the in-box of the City email address. The City will not be liable for any delay for any reason including technological delays, or issues by either party’s network or email program, and the City will not be liable for any damages associated with Proposals not received.

The City reserves the right to accept Proposals received after the closing date and time but is under no obligation to evaluate.

Proposals will not be opened in public.

Proposals may be withdrawn upon request sent to email: bid@coquitlam.ca prior to time set as closing time for receiving Proposals.

7.7 Acceptance Period for Proposals

The City requests that Proposals received as a result of the RFP be open for acceptance for a period of 60 days from the Closing Date. Proponents are requested to confirm the period for acceptance.

7.8 No Binding Contract

The City may, after reviewing the Proposals received, enter into discussions with one or more of the Proponents, without any such discussions in any way creating a binding contract between the City and any Proponent. There will be no binding agreement with the City until a formal, written agreement has been negotiated with a Proponent and/or a City purchase order has been issued.

7.9 Communication with Proponents and Addenda

Questions are to be submitted 3 business days prior to the closing date quoting the RFP name and number sent to email: bid@coquitlam.ca

If a change or additional information is warranted, the City’s response will be communicated to all Proponents by means of written Addenda issued prior to the closing date and will be issued by posting on the City’s website.

Proponents are required to check the City’s website before the closing date for addenda and updated information at www.coquitlam.ca/bidopportunities

Upon submitting a Proposal, Proponents are deemed to have received all Addenda and deemed to have considered the information for inclusion in the Proposal submitted.

Should there be any discrepancy in the information provided; the City’s original file copy shall prevail.

7.10 Fees

All monetary references in a Proposal must be in Canadian currency. Proposal fees shall be structured in a fee matrix showing the level of effort by each team member, anticipated hours, fee rates and a total Lump Sum Fee that includes all disbursements and overhead.

All information contained in this RFP and any resulting addenda will be incorporated into any agreement between the City and the successful Proponent, and therefore, must be considered by the Proponent in preparing their Proposal.

There will be no opportunity to make any additional claim for compensation for additional charges that were not considered and included in the Proposal lump sum fee submitted, unless the City, at their sole discretion, deems that it would be unreasonable to do so, or there is additional services added to the Scope of Services.

8.0 General Conditions

The following general conditions will apply to this contract.

8.1 Notification of Award

The City will notify the successful Proponent (“Consultant”) in writing of its decision to award the services. Award and issue of a City Purchase Order (PO) is contingent upon sufficient funds being available in the City’s budget.

8.2 Indemnification

The Consultant shall indemnify and save harmless the City, from and against all losses and all claims, demands, payments, suits, actions, recoveries and

judgements of every nature and description, brought or recovered against its firm and/or the City, by reason of any act or omission of the Consultant, its agents, sub-Consultants or employees in the execution of the Services.

8.3 Business License

The Consultant shall maintain a valid City of Coquitlam Business License. For information, contact the City's License Department (Tel: 604-927-3085).

8.4 Intellectual Property Rights

The Contract establishes the owner of the "Instruments of Service" in connection with this Project.

The Consultant will remain owner of all Instruments of Service but the City will become the owner of the design and other materials requested and provided as defined as deliverables under this RFP.

8.5 Cancellation

The contract may be cancelled by either party for any reason without cause or penalty upon 30 days written notice and the Consultant would be compensated for services and deliverables provided to that point in time.

8.6 Law

The RFP and any resultant award shall be governed by and construed in accordance with the laws of the Province of British Columbia, which shall be deemed the proper law thereof.

9.0 Payments - Invoicing

Upon award, a City Purchase Order (PO) will be issued to the Consultant based on the proposal submitted, and as finally negotiated to complete the Services. Invoice amounts in excess of the PO will not be accepted. In case of extenuating circumstances, the City may approve additional costs for additional Services which will require written City approval before any additional Services are provided.

Invoices are to be prepared on a monthly basis and sent to email: apinvoices@coquitlam.ca, the City's Finance Division, Attention: Accounts Payable, and must indicate the Project Name, the PO Number and the City's Project Manager's name.

Payment for Services provided will be in accordance with the City PO and made at the agreed hourly rates for personnel and the monthly costs for approved disbursements. Disbursements such as photocopying, computers, faxes etc. should not be invoiced and will not be paid. The hourly rate amounts charged always reflect the cost of doing business and, therefore, payment for these types of disbursements will not be considered.

Invoices submitted are to be accompanied by a summary cost status sheet of information regarding hours budgeted, hours spent to date, and projected total hours, all with associated costs. If the work indicated on the summary sheet and on the invoice is confirmed and approved by the Project Manager, payment is made to the Consultant net 30 days after the invoice is received by the City.

Please be advised that, at any time, the City may request justification and supporting documentation for the hours of work or level of effort in the provision of the Services shown on an invoice.

10.0 Proposal Submission and Evaluation Criteria

Proposals will be evaluated by City staff according to the following criteria. This list is not intended to be exhaustive and is not ranked in order of preference or priority.

The proposal submission should be clear, concise, complete and provide details on:

- a) Project team, description and role of Consultant team members and sub-Consultants;
- b) Experience and Qualifications of team members;
- c) Demonstrated Experience and Success; provide examples of similar successful projects, project dates, client names and contact information, description of team members role in each project;
- d) Work plan and methodology; breakdown of tasks necessary to complete the Scope of Services as described in this RFP;
- e) Proposal Price for Scope of Services; fee matrix with hourly rates and charges by level of effort (hours) associated to task and total lump sum fee including disbursements, (exclude GST);
- f) Proposal Price for Additional Optional Services; total lump sum fee for each type of service including disbursements;

- g) Value Added Services – Describe your competitive advantage, value added services and benefits that would be provided to the City;
- h) Timelines, completion date and confirm availability of project team;
- i) List of all documents or data that would be required.

The Evaluation Committee may, at its discretion, request clarifications or additional information from a Proponent with respect to any Proposal, and the Evaluation Committee may make such requests to only selected Proponents. The Evaluation Committee may consider such clarifications or additional information in evaluating a Proposal.

If the City selects a Preferred Proponent, then it will enter into discussions with the Preferred Proponent to clarify any outstanding issues and attempt to finalize the terms of a Contract, including negotiation of scope of services and financial terms to meet with budget.

The City reserves the right to accept or reject any or all proposals or cancel this RFP at any time at the City's sole discretion.

Proponents agree that by submission of their proposal, they agree the City may disclose the name of their company. However, no totals, weights, prices or scores will be provided to any Proponent.

Should the City proceed with additional services in future phases, the City reserves the right to sole source with the successful Proponent, or invite select companies to submit proposals or, may issue a new Request for Proposals.

11.0 Reference Materials

Proponents should identify other relevant documents or data that would contribute to achieving the objectives. If such data requires any original research, the Proponent should identify any costs as a separate item for consideration by the City.