



## REQUEST FOR PROPOSALS

RFP No. 14-05-10

### Electronic Plan Submission and Review (ePlan) System

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

**Tuesday, July 22, 2014**  
(Closing date and time)

#### **OBTAINING RFP DOCUMENTS**

RFP documents are available for downloading from the City's website:  
[www.coquitlam.ca/BidOpportunities](http://www.coquitlam.ca/BidOpportunities)

#### **ENQUIRIES**

Questions are to be submitted in writing within 3 business days of the Closing date quoting the RFP name and number and sent to email: [bid@coquitlam.ca](mailto:bid@coquitlam.ca)

#### **ADDENDA**

Proponents are required to check the City's website for any updated information and addenda issued before the closing date at the following website address:  
[www.coquitlam.ca/BidOpportunities](http://www.coquitlam.ca/BidOpportunities)

The City reserves the right to accept or reject any or all Proposals and will not be responsible for any costs incurred by the Proponents in preparing a response.

D. Trudeau  
Purchasing Manager  
Date of Issue: June 19, 2014

## DEFINITIONS

**“Services Agreement” “Agreement” “Contract”** means the contract for services or City Purchase Order that will be issued to formalize with the successful Proponent through negotiation process with the City based on the proposal submitted and will incorporate by reference the Request for Proposals, Specifications, Drawings, any additional subsequent information, any addenda issued, the Proponent’s response and acceptance by the City.

**“City” “Owner”** means City of Coquitlam.

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

**“Proponent”** means responder to this Request for Proposals.

**“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 Proposals.

**“Services”** means and includes the provision by the successful Proponent of all services, duties and expectations as further described in this RFP.

## 1. REQUEST FOR PROPOSALS

### 1.1 Request

The City of Coquitlam requests proposals from professional qualified experienced Consultants to provide an **Electronic Plan Submission and Review (ePlan) System**.

The **ePlan** system should provide the following high-level features:

- a secured internet-facing portal that allows applicants to submit their plans online in multiple different formats;
- professional engineering level review tools including but not limited to:
  - accurately scale drawings;
  - measure area and linear distance;
  - enter written comments;
  - ability turn on and off layers;
  - highlight features (i.e. fire separations);
  - version and page overlay and comparison;
- the ability for multiple internal staff to simultaneously review and markup plans;
- the ability for staff to electronically transmit marked-up plans and required changes (i.e. comment sheet) back to the applicant;
- the ability to work alongside or integrate with the City's current permit and planning application software (AMANDA) and processes;

Hosted or Software-as-a-Service (SaaS) models will be considered under the following additional criteria:

- Must comply with British Columbia Freedom of Information and Protection of Privacy Act (FOIPPA) requirements. Refer to <https://www.oipc.bc.ca> for more information.

### 1.2 Scope of Services

The scope of services for the **ePlan** system implementation includes but is not limited to:

- Initial software license for either a City-hosted or SaaS solution;
- Professional services for design, implementation, configuration and project management (if applicable) working in conjunction with the City's technical and functional teams

- End-user and administrator training, including training materials and documentation
- On-going support and maintenance costs for the next 5 years
- Integration with the City's existing AMANDA License and Permit system where applicable

### 1.3 Project Background

The City currently accepts design plans/drawings from applicants as part of the permit or planning application processes. Applicants are required to submit up to 8 sets of hard-copy plans for City staff to review prior to issuing the appropriate approvals and/or permits to proceed with a building or development project.

During the review period, internal staff may discover issues or deficiencies with the applicant's plans. Therefore, the submission of plans for a single project can be an iterative process as the applicant and internal staff member go back-and-forth on required changes to plans.

The Planning & Development department is looking for ways to increase their efficiency in receiving, reviewing, distributing, responding to and comparing application plans through implementation of an **ePlan** system.

The City currently utilizes the AMANDA Permits and Licensing system from CSDC Systems (<http://csdcsystems.com/permitting-and-compliance>) for permit and planning application tracking and workflow. The City does not currently have a system to allow the public to apply for and track the status of applications online, although this is something that is being considered as a future enhancement to the AMANDA system. The City is not considering a wholesale replacement for the AMANDA system, but rather a system that integrates with AMANDA for back-office permit and planning application tracking is the preference.

1.4 Current Technical Environment

<b>Desktop PCs</b>	Windows 7 Professional
<b>Servers</b>	Windows 2008 R2, VMWare vSphere 5.5
<b>Database</b>	Oracle 11.2.0.x, IBM AIX 7.1
<b>LDAP</b>	Microsoft Active Directory 2008 R2
<b>Applications</b>	OpenText eDOCS DM 5.3.1 SP3 (upgrading to SP5) CSDC AMANDA 4.3 (upgrading to version 6) Microsoft Office 2010 (Word, Excel, etc.) Adobe Acrobat X Adobe Reader XI Autodesk AutoCAD 2012 (LT, base AutoCAD, Map 3D, Civil 3D)

## **2. INSTRUCTIONS TO PROPONENTS**

### 2.1 Prices

All Prices shall be in Canadian Funds and shall remain **FIRM** for the supply, service, installation and maintenance for the initial five (5) year term. GST is not to be included.

### 2.2 Closing Date & Time

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

**Tuesday, July 22, 2014**

### 2.3 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](http://qfile.coquitlam.ca/bid)

**1. In the "Subject Field" enter:** RFP Number and Name

**2. Add files in .pdf format and "Send"**

(Ensure your web browser remains open until you receive 2 emails from Qfile to confirm upload is complete)

Proposal submitted shall be deemed to be successfully received when displayed as new email at the City's email address. The City will not be responsible for any delay or for any Proposals not received 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 at its sole discretion, 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.

#### 2.4 Inquiries

Questions are to be submitted in writing 3 business days prior to the closing date and sent to email: [bid@coquitlam.ca](mailto:bid@coquitlam.ca) quoting the RFP name and number.

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

The City shall, determine at its sole discretion, whether the query requires response, and such responses will be made available to all Proponents by issue of Addenda posted on the City's website that will be incorporated into and become part of the RFP. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.

#### 2.5 Addenda

Proponents are required to check the City's website for any updated information and addenda issued, before the Closing Date at the following website address: <http://www.coquitlam.ca/BidOpportunities>

Upon submitting a proposal, Proponents will be deemed to have received notice of all addenda that are posted on the City website, 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.

#### 2.6 Freedom of Information and Protection of Privacy

Proposals submitted become the property of the City and are subject to the Freedom of Information and Protection of Privacy Legislation of British Columbia and contents may be disclosed if required to do so, pursuant to the Act.

Upon submission of a proposal, Proponents agree the City may disclose the names of their company.

To request documentation confidentiality, Proponents must submit a covering letter with their Proposal, detailed the specifics of their confidentiality request.

## 2.7 General Information

Wherever possible, the City wishes to purchase goods and services which represent minimal impact to the environment, or that offer value to a sustainability objective.

The City of Coquitlam reserves the right to cancel any order or contract if not fulfilled within a reasonable time and in accordance with the terms and conditions specified at their sole discretion. Time shall be of the essence.

Incomplete Proposals or Proposals submitted on forms other than the Proposal Form may be rejected.

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

## 2.8 Irrevocability & Acceptance of Proposals

The City requests that proposals remain open for acceptance for a period of not less than sixty (60) days from the closing date and time.

The City of Coquitlam reserves the right to waive formalities in, accept or reject any or all Proposals, cancel this RFP, or accept the Proposal deemed most favourable in the interest of the City.

The City will be under no obligation to proceed further with any submitted proposal and should it decide to abandon same, it may, at any time, invite further proposals for the supply of the described services or enter into any discussions or negotiations with any party for the provision of the services. No alterations, amendments or additional information will be accepted after the closing date and time unless invited by the City.

Should a Proposal be accepted, a City purchase order (PO) will be placed for the provision of these services that will incorporate all related documents and correspondence.



2.9 No Claim

Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for any compensation of any kind whatsoever, relating to 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.

2.10 Non-Solicitation

Proponents and their agents will not contact any member of the City Council with respect to this RFP at any time prior to the award of a Contract or the termination of the RFP, and the City may reject the Proposal of any Proponent that makes any such contact.

2.11 Conflict of Interest

Proponents shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the City's elected or appointed officials or employees.

2.12 Liability for Errors

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

### 2.13 Evaluation Criteria

The criteria for evaluation of the Proposals are listed in no particular order or precedence and may include but are not limited to, the following:

#### **Corporate**

- References and demonstrated experience with successful implementation(s) of similar size, scope and complexity
- Project Team – Roles and responsibilities

#### **Technical**

- Technical Architecture
- Functionality and suitability of proposed solution
- Implementation methodology, plan and schedule, key deliverables and success factors
- Training strategy
- Support, maintenance and upgrades plans

#### **Financial**

- Total cost – Purchase, implementation costs, training costs, on-going software support and maintenance costs for 5 years

#### **Value Added Benefits**

- Sustainability value, i.e. environmental, financial/economic, social/ethical
- Value Added Services or Product Features

#### **Demonstration**

Short-listed Proponents will be required to provide a 90 minute demonstration of their proposed ePlan solution with time for questions and answers. This can be provided in-person or via a web conference.

The demonstration will be evaluated and the results will be included in the overall scoring.

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.

The evaluation will be confidential and no totals, scores or prices will be provided to any Proponent. However, upon submission of a Proposal, Proponents agree that the City may disclose the name of their company.

#### 2.14 Negotiation

The City reserves the right, prior to contract award, to negotiate changes to the scope of the services or to the contract documents (including pricing) with the proponent or any one or more proponents, proposing the “best value” without having any duty to advise any other proponent or to allow them to vary their proposal as a result of changes to the scope of the services or to the contract documents; and the City may enter into a changed or different contract with the proponent(s) proposing the “best value”, without liability to proponents who are not awarded the contract.

#### 2.15 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.

### **3. AWARD OF CONTRACT**

#### **3.1 Notification of Award**

The City will notify the successful Proponent (“Consultant”) in writing of its decision to award the project.

#### **3.2 Indemnity**

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 him 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 work.

#### **3.3 Insurance Requirements**

The Consultant shall submit a Certificate of Insurance signed by the Insurance Company certifying that the required insurance policies are in force and that:

- The City of Coquitlam shall be named as additional insured;
- The policy shall not be cancelled, lapsed, transferred, assigned or materially altered without at least thirty (30) days written notice to the City of Coquitlam and the City’s written approval of the cancellation, transfer, assignment or alteration;
- Such certificate to be as shown in Appendix A.

The successful Proponent shall carry Comprehensive General Liability (CGL) Insurance satisfactory to the City in the amount of TWO MILLION DOLLARS (\$2,000,000.00) inclusive per occurrence.

The Consultant’s Equipment Insurance covering all equipment owned or rented by the Consultant and its servants, Managers or employees against all risks of loss or damage with coverage sufficient to allow for immediate replacement and shall contain a Waiver of Subrogation against the City.

The Consultant shall ensure that all approved Sub-Consultants carry insurance in the form and limits specified in this clause.

3.4 Business Licence Requirement

City of Coquitlam By-law No. 49 requires that the Consultant have a current business license. For more information, please contact the City's License Department (Tel: 604-927-3085).

3.5 WorkSafeBC Coverage

The Consultant shall be in good standing with WorkSafeBC and provide a WorkSafeBC registration number.

3.6 Permits

The Consultant will provide and pay for all licenses and permits required to carry out the work.

3.7 Operations and Coordination of the Services

The Consultant agrees to coordinate the execution of the Works and Services with the City such that disruption of the work of all involved is minimized.

3.8 Advertisement

The Consultant will not advertise its relationship with the City without prior written authorization.

3.9 Warranty

The Consultant warrants that the Services and any products supplied with the services are free of all defects, deficiencies, and problems arising from workmanship for a period of one (1) year from the date of approved final completion.

3.10 Software & Information/Intellectual Property

The Consultant warrants clear title to materials supplied by them and warrants them free from defects and/or imperfections, and will indemnify, defend and hold the City harmless against any and all suits, claim demands and/or expenses, patent litigation, infringement, material, builders', labour's liens, or any claims by third parties in or to the services/supplies mentioned and supplied.

It is also the Consultant's responsibility to ensure that the City has all licenses required to use any software that may be supplied by the Consultant pursuant to the contract.

Any and all information, reports, documents, data, computer software, or other items or any nature whatsoever, in any form, developed by the Consultant pursuant to this Contract whether completed or not, together with all designs or materials capable of intellectual property protection, prepared, developed or created by the Consultant, its employees or agents during the performance of and/or pursuant to this Agreement shall automatically become the exclusive property of the City.

The Consultant will execute any assignments of copyright required by the City to this provision effect. The Consultant will deliver all such property to the City forthwith upon demand by the City.

### 3.11 Sub Letting

The Consultant will not, without the written consent of the City of Coquitlam, assign, sublet or transfer any subsequent contract or any part thereof.

### 3.12 Payment Schedule

Upon award, a City Purchase Order 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 Purchase Order 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 submitted in .pdf format sent to the City's Finance Division, email: [apinvoices@coquitlam.ca](mailto:apinvoices@coquitlam.ca) Attention: Accounts Payable, and must indicate the Project Name, the Purchase Order Number and the City's Project Manager's name. GST and PST are to be shown separately on the invoice.

Payment is made to the Consultant net 30 days after the invoice is received by the City and subject to approval of successful commissioning acceptable to 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.

### 3.13 Default

The City reserves the right, at its sole discretion, to immediately terminate the contract, in whole or in part, and purchase the software and services of any other Consultant, if the successful Consultant:

- Fails to make delivery of the services
- Fails to perform any provision of the contract within the time specified, or within a reasonable amount of time if no time is specified, as determined by the City
- Fails to meet the City's standard of expected and agreed level of service and performance
- Be adjudged bankrupt or makes general assignment for the benefit of creditors

### 3.14 Cancellation

The contract may be cancelled by either party, without cause or penalty upon 30 days written notice.

The Consultant would be compensated for software and services that have been provided to the City at the time that cancellation notification is provided.

Within 10 days, the Consultant agrees to provide the City with all City data and intellectual property created as a result of the contract.

### 3.15 Dispute Resolution

The parties will make reasonable efforts to resolve any dispute, claim or controversy arising out of this contract using the following dispute resolution procedures:

- a) Negotiation – the parties will make reasonable efforts to resolve any dispute by amicable negotiations and will provide frank, candid and timely disclosure of all relevant facts, information and documents to facilitate negotiations.

- b) Mediation – If all or any of a Dispute cannot be resolved by good faith negotiations within 30 days, either party may refer the matter to mediation. Within 10 days of delivery of notice, the parties will mutually appoint a mediator. If the parties fail to agree on the appointment of the mediator, then either party may apply to the BC International Commercial Arbitration Centre for appointment of a mediator. The parties will continue to negotiate in good faith to resolve the Dispute with the assistance of the mediator. The place of mediation will be Coquitlam, British Columbia. Each party will bear its own costs of participating in the mediation.
  
- c) Litigation – If within 90 days of the request of the mediation, the Dispute is not settled, or if the mediator advises that there is no reasonable possibility of the parties reaching a negotiated resolution, then either party may without further notice, commence litigation in the City of Vancouver, British Columbia.





## REQUEST FOR PROPOSALS

RFP No. 14-05-10

### Electronic Plan Submission and Review (ePlan) System

Proposal will be received on or before 2:00 pm local time on

Tuesday, July 22, 2014

#### 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 your web browser remains open until you receive 2 emails from Qfile to confirm upload is complete)

**Proponents are responsible to allow ample time to complete the Proposal Submission process. If assistance is required phone 604-927-3060 or fax 604-927-3035.**

### PROPOSAL SUBMISSION FORM

(Complete and return this section)

Submitted By: \_\_\_\_\_  
Company Name

**1. Price**

<b>Price for Supply &amp; Implementation of ePlan System</b>		
<p>Provide price for an implementation using the following example:</p> <ul style="list-style-type: none"> <li>• 75 named users with read/write access</li> <li>• 10 named users with read-only access</li> <li>• Up to 4000 applications submitted per year</li> </ul> <p>Amounts stated above are estimates only and for evaluation purpose only.</p>		
Item	Description	Price (exclude PST & GST)
1-1.	Initial Software License Cost	\$
1-2.	Implementation & Configuration Services (incl. travel expenses if applicable)	\$
1-3.	Integration Services (incl. travel expenses if applicable)	\$
1-4.	Administrator and End-User Training	\$
1-5.	Software Support and Maintenance for initial one (1) year term	\$
	<b>Total (exclude PST &amp; GST)</b>	<b>\$</b>
1-6.	<b>Years 2 through 5</b> – Software Upgrades, Support & Maintenance per year	\$
1-7.	Price for adding additional licenses in future years (specify license metric)	\$
1-8.	Hourly rate for additional professional consulting services	\$
1-9.	Advise if there would be any additional costs associated with the software or services (describe below)	\$

Award is subject to budget funds available and best overall value to the City.

Proposals are to state if any additional work is required to be provided by the City.

**2. ePlan System Software and Support**

Item	Description	Provide Details
2-1	Software Name and Version	
2-2	How is the software licensed? (Named-user, concurrent-user, server-based, etc.)	
2-3	How do we access support? (email, phone, web)	
2-4	What are the hours of availability and response time for support?	
2-5	What support services are chargeable during the support period?	
2-6	What support services are non-chargeable during the support period?	
2-7	Describe the process and frequency for providing upgrades and patches for the software.	
2-8	How are annual support and maintenance price increases determined? (Locked in at purchase, capped at a percentage, tied to an index such as CPI, etc.)	

### 3. Functional and Technical Requirements

Item	Description	Requirement	Yes/No	Additional Comments (e.g. How? Is it existing functionality or an Add-on?)	Price for Optional Add-on
	<b>Functional Requirements</b>				
3-1	Professional engineering level review tools including but not limited to: <ul style="list-style-type: none"> <li>- area and linear distance measurement</li> <li>- accurately scale drawings</li> <li>- manage multiple pages</li> <li>- turn drawing layers on/off</li> <li>- highlight features on the drawing (e.g. fire separations)</li> <li>- add written comments</li> </ul>	Required			
3-2	Review/overlay multiple versions to identify changes	Preferred			
3-3	Snap to a corner, line or point when calculating linear distance or area	Preferred			
3-4	Insert stamps (e.g. approvals, dates, reviewer's name, file numbers, etc.)	Preferred			
3-5	Each reviewer to have a unique layer and/or colour for their comments to applicant	Preferred			
3-6	Reviewers to have a layer for internal-only comments	Preferred			
3-7	Automatically compile comments and generate a deficiency list that can be emailed to the applicant	Preferred			
3-8	Standard list of comments/corrections to choose from, unique for each review type/dept., and	Preferred			
3-9	Generate email notifications to applicant based on specific milestones (e.g. submitted, reviewed, approved, etc.)	Preferred			
3-10	Automatically stamp drawing submissions with date, application number, etc.	Preferred			

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Item	Description	Requirement	Yes/No	Additional Comments (e.g. How? Is it existing functionality or an Add-on?)	Price for Optional Add-on
3-11	Allows concurrent reviews by multiple reviewers/depts. at the same time	Preferred			
3-12	Overlay multiple pages of the same version of a drawing to assist with review of multiple stories	Preferred			
3-13	Add blocks/symbols for drawing mark-ups (e.g. emergency exits)	Preferred			
	<b>Technical Requirements</b>				
3-14	Provide a secure online portal for uploading of drawings	Required			
3-15	Ability to export plans in common file formats	Required			
3-16	Must comply with BC Freedom of Information & Privacy Protection Act (FOIPPA)	Required			
3-17	Ability to pull permit information (e.g. permit #, tasks, dates, etc.) from AMANDA	Preferred			
3-18	Ability to push plan review information (e.g. dates, user names, etc.) to AMANDA	Preferred			
3-19	Ability to run on virtual servers (i.e. VMWare)	Preferred			
3-20	Ability to use Oracle as the supporting database platform	Preferred			
3-21	Ability to run test/dev sites without purchasing additional license(s)	Preferred			
3-22	Document version control	Preferred			
3-23	Ability to customize public-facing upload screens to include instructions, disclaimers, logos, etc.	Preferred			
3-24	Ability to transfer plans to EDMS in PDF format	Preferred			
3-25	Ability to access plans on mobile systems, including iOS and Android	Preferred			

Item	Description	Requirement	Yes/No	Additional Comments (e.g. How? Is it existing functionality or an Add-on?)	Price for Optional Add-on
3-26	Ability to integrate with Active Directory/LDAP for staff authentication	Preferred			
3-27	Ability to restrict data and file access based on security levels	Preferred			
3-28	Ability to track and audit staff access to data and files	Preferred			
3-29	Ability to accept drawing uploads in various common drawing formats (e.g. PDF, DWG, etc.)	Preferred			

#### 4. Software-as-a-Service (SaaS) Model

If a hosted or SaaS model is being proposed, please provide the following information.

Item	Description	Provide Details
4-1	Where is the solution and platform hosted (e.g. by proponent or 3rd party)? Note, solutions hosted outside Canada are subject to additional privacy regulations than Canada based solutions.	
4-2	How is the data protected?	
4-3	How is the data backed up?	
4-4	What controls are in place for intrusion detection, perimeter security, physical security and security patching?	
4-5	Who has access to the data?	
4-6	What policies are in place to detect, prevent and mitigate identity theft with respect to storing personal information?	
4-7	Have there been any instances of identity theft in the last two years? Please describe.	

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Proposal Submission Form

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4-8	How are security incidents and breaches reported internally and to clients?	
4-9	What is your high-level disaster recovery plan and how is client information protected in such as event?	
4-10	Who owns the data collected during and after the services have been terminated, or if the firm goes out of business?	
4-11	How will the City get its data back in the event the Consultant goes out of business?	
4-12	How are routine reviews of your security and disaster recovery environments undertaken?	
4-13	How is third-party verification of your security and disaster recovery environments undertaken?	
4-14	What is your Service Level Agreement (SLA) and associated terms, including performance and latency targets? (Please attach) If applicable, provide information on recommended infrastructure to reach these targets.	

**5. Project Implementation Methodology**

Describe the implementation of the proposed solution, including but not limited to:

- the technical architecture of the proposed solution (attach diagrams where possible);
- the technical components of the proposed solution, including programming languages, 3<sup>rd</sup> party components, application programming interfaces, etc.;
- list of project and implementation consultants to be used on the project including roles and responsibilities (attach resumes where possible);
- key deliverables, success factors and acceptance criteria

**6. Training Plan**

Provide a description and duration of the training courses that will be provided as part of the ePlan software implementation.

The City would prefer that all courses be conducted on-site at City Hall, 3000 Guildford Way, Coquitlam, B.C., Canada. This may include virtual classroom or “eLearning” technologies.

Training Course Title, Description and Location	Intended Audience (Reviewer, super-user, administrator, etc.)	Duration (hours/days)



**7. Project Schedule**

Summarize the major deliverables and high-level milestones for the ePlan implementation project. The Proponent is to state when they will be available and ready to start this project.

The City anticipates the project will begin in September 2014.

The implementation schedule will be considered in the evaluation.

<b>Major Deliverables and Milestones</b>	<b>Start Date</b>	<b>Completion Date</b>

**8. Sub-Consultants**

The following Sub-Consultants will be utilized in this project:

<b>Role and Responsibility</b>	<b>Legal name, full address and principle business of Sub-Consultant</b>

The Consultant is responsible for ensuring that all Sub-Consultants comply with all terms and conditions described in this RFP.

**9. Experience and References**

Describe recent projects of similar size, scope and complexity that the Proponent has successfully completed within the last 5 years. The Proponent agrees that the City may contact the references provided.

<b>Customer/Company Name:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone / Email:</b>	
<b>Project Name and Description:</b>	
<b>Completion Date:</b>	
<b>Approximate Value:</b>	

<b>Customer/Company Name:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone / Email:</b>	
<b>Project Name and Description:</b>	
<b>Completion Date:</b>	
<b>Approximate Value:</b>	

<b>Customer/Company Name:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone / Email:</b>	
<b>Project Name and Description:</b>	
<b>Completion Date:</b>	
<b>Approximate Value:</b>	

**10. Sustainability**

Provide information on any initiatives, programs and product choices that the Proponent has implemented that could be considered an environmental, financial/economic, social/ethically sustainable value:

**11. Value Added**

Provide information on what makes your firm innovative, what is your competitive advantage, and what other services your firm provides that would assist or be of benefit to the City:

**12. Acceptance**

The City requests that proposals remain open for acceptance for a period of not less than ninety (90) days from the closing date.

We confirm that this proposal is open for acceptance by the City for a period of: \_\_\_\_\_ days.

**13. Addenda**

We acknowledge receipt of the following Addenda related to this RFP and have incorporated the information in preparing this Proposal:

Addendum No.	Date Issued	Date Received

**14. Authorization**

We hereby submit our Proposal for the software and services as specified and undertake to carry out the services in accordance with all referenced Terms & Conditions of this RFP, and all Regulations applicable to this project.

<b>Company Name</b>	
<b>Street Address</b>	
<b>Province &amp; Postal Code</b>	
<b>Tel No.</b>	
<b>E-mail</b>	
<b>GST Registration No.</b>	
<b>WorkSafeBC Account No.</b>	
<b>Date</b>	
<b>Contact Name and Title</b> (please print)	
<b>Signature</b>	

For the purpose of the Proposal submission, electronic signatures are accepted.

**THIS FORM IS TO BE COMPLETED BY THE INSURANCE BROKER**

(A fillable form is also available for electronic completion on the City's website):

[http://www.coquitlam.ca/Libraries/Coquitlam\\_Forms/Certificate\\_of\\_Insurance\\_-\\_Consultant\\_Form.sflb.ashx](http://www.coquitlam.ca/Libraries/Coquitlam_Forms/Certificate_of_Insurance_-_Consultant_Form.sflb.ashx)

This certifies that policies of insurance as described below have been issued to the Insured named below and are in full force and effect at this time. It is understood and agreed that **thirty (30) days' notice of cancellation** or reduction in applicable limit of any of the policies listed below, with the exception of ICBC, will be given to the holder of this certificate.

**NOTE: INSURANCE COMPANIES MUST BE LICENSED TO OPERATE IN BRITISH COLUMBIA.**

This Certificate is issued to: **City of Coquitlam, 3000 Guildford Way, Coquitlam, BC V3B 7N2**

<b>Insured</b>	<b>Name:</b>		
	<b>Address:</b>	<b>Email:</b>	<b>Phone:</b>
<b>Broker</b>	<b>Name:</b>		<b>Agent's Name:</b>
	<b>Address:</b>	<b>Email:</b>	<b>Phone:</b>

**Project to which this Certificate applies:**

<b>Contract No.: 14-05-10</b>	<b>Project Name &amp; Description: Electronic Plan Submission and Review (ePlan) System</b>
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**COMMERCIAL GENERAL LIABILITY** coverage is required to insure against liability from the activities arising out of operations or work in connection with the above-described project, including liability arising out of the use of City property.

Type of Insurance	Insurer Name and Policy Number	Policy Term (dd/mm/yy)	Limits of Liability/Amounts
<b>Section 1: Commercial General Liability</b>		From:	Bodily Injury, Death & Property Damage
<input checked="" type="checkbox"/> Occurrence Form		To:	\$ _____ Per Occurrence
<input type="checkbox"/> Umbrella Liability		From:	\$ _____ Aggregate
		To:	\$ _____ Deductible
			\$ _____ Umbrella Limit
<input type="checkbox"/> Excess Liability		From:	\$ _____ Excess Limit
		To:	<input checked="" type="checkbox"/> <b>MINIMUM \$2,000,000</b>
<b>Section 2: Automobile Liability</b> (owned or leased vehicles)		From:	Bodily Injury & Property Damage
		To:	\$ _____ Limit
			<input checked="" type="checkbox"/> <b>MINIMUM \$2,000,000</b>
<b>Section 3: Professional Errors &amp; Omissions Liability</b>		From:	<b>Minimum</b>
		To:	\$ _____ Per Claim(\$500,000)
			\$ _____ Aggregate(\$1,000,000)

**Particulars of General Liability Insurance (Section 1):**  indicates that the coverage is included.

- |  |   |   |
|--|---|---|
| <input checked="" type="checkbox"/> City of Coquitlam as Additional Insured    | <input checked="" type="checkbox"/> Blanket Contractual                       | <input checked="" type="checkbox"/> Occurrence Property Damage      |
| <input checked="" type="checkbox"/> Premises & Operations                      | <input checked="" type="checkbox"/> Cross Liability/Severability of Interests | <input checked="" type="checkbox"/> Contingent Employer's Liability |
| <input checked="" type="checkbox"/> Broad Form Products & Completed Operations | <input checked="" type="checkbox"/> Employees as Additional Insureds          | <input checked="" type="checkbox"/> Broad Form Loss of Use          |
| <input checked="" type="checkbox"/> Personal Injury                            | <input checked="" type="checkbox"/> Non-Owned Automobile                      |   |
| <input checked="" type="checkbox"/> Owners & Contractors Protective            | <input checked="" type="checkbox"/> Coverage is Primary and not contributory  |   |

It is understood and agreed any deductible or reimbursement clause contained in the policy shall be the sole responsibility of the Named Insured.

**Broker Authorization (Signature & Stamp)** \_\_\_\_\_

Date \_\_\_\_\_

**INTERNAL USE ONLY**

Certificate  Approved  Not Approved

**COMPLETE & SUBMIT TO: CITY OF COQUITLAM**  
Email: [bid@coquitlam.ca](mailto:bid@coquitlam.ca)