

City of Coquitlam

Request for Proposals RFP No. 16-03-09

**Insurance Brokerage Services** 

Issue Date: June 2, 2016

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**APPENDIX A – City's Current Policies** 

**PROPOSAL SUBMISSION FORM** 

#### **DEFINITIONS**

The following words and terms, unless the context otherwise requires, in the Request for Proposal document shall have the meaning set out below.

**"Contract"** means the contract for services or City purchase contract that will be issued to one or more successful Proponent(s) to formalize the negotiated agreement for the provision of the Service to the City based on the Proposal submitted and will incorporate by reference the Request for Proposals, any additional subsequent information, any addenda issued, the Proponent's response and acceptance by the City.

"City" means City of Coquitlam.

**"Broker"** means the person(s), firm(s) or corporation(s) appointed by the City to carry out all duties, obligations, work and services outlined in this Request for Proposals and all associated documentation, which may also include mutually agreed revisions subsequent to submission of a Proposal. Both "Broker" 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.

"Proponent" means responder to this Request for Proposals.

"Proposal" means the submission by the Proponent.

"RFP" "Request for Proposals" includes the complete set of documents and specifications, together with any subsequent addenda thereto, included in this Request for Proposals.

**"Services"** means the provision by the successful Proponent of all Broker services, duties, deliverables and expectations as further described in this Request for Proposals.

#### 1.0 INTRODUCTION

#### 1.1 Request for Proposals

The City of Coquitlam ('City') requests proposals from professionally qualified firms to provide **Insurance Brokerage Services** (the "Services").

Proponents must have experience and expertise in insurance products, and the provision of on-going insurance consulting and support to the public sector and other local governments.

To be considered, Proponents should have an established, reputable and regularly staffed business office in the Metro Vancouver area and demonstrated experience working with British Columbia municipalities.

Proponents are not to approach any underwriters in preparation of their Proposals. Any Proponent that approaches or contacts any existing or proposed insurer of the City of Coquitlam will be disqualified.

#### 1.2 Obtaining RFP Documents

Request for Proposal documents are available for downloading from the City's website: www.coquitlam.ca/BidOpportunities

#### 1.3 Term of Contract

It is anticipated the Contract will commence approximately in October 2016.

The term of Contract will be for five (5) years with the option to extend for additional years. Renewal or extension of the Contract will be subject to the parties' mutual agreement of the fees and included Services.

#### 1.4 Overview of Services

The successful Proponent will act as the City's Broker and will be marketing and obtaining insurance coverage and providing a wide range of insurance, risk management and other related services to and on behalf of the City. The Broker will also be providing guidance in the management of self-insured retentions. As the City maintains both liability (and related) insurance policies, and property (and related) insurance policies, Proponents are invited to submit proposals in one of three categories:

**Option 1: Liability Only**- Review, analyze, market and bind insurance coverages for the City's liability policies;

OR

**Option 2: Property Only** - Review, analyze, market and bind insurance coverages for the City's property policies;

OR

**Option 3: Both Liability and Property** - Review, analyze, market and bind insurance coverages for both the City's liability and property policies;

#### Refer to:

**Section 3** - for the complete Scope of Services **Appendix A** – for the City's current policies

#### 2.0 INSTRUCTIONS TO PROPONENTS

#### 2.1 All Proposals Public

The City is bound by the provisions of the *Freedom of Information and Protection of Privacy Act* of British Columbia. Proponents are advised that Proposals will be treated as public documents and their contents may be disclosed upon written request if required to do so by law.

#### 2.2 Closing Date & Time

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

#### Thursday, June 23, 2016

#### 2.3 Instructions for Proposal Submission

Proposal submissions are to be consolidated into one (1) .pdf file and uploaded electronically through QFile, the City's file transfer service accessed at website: <a href="mailto:qfile.coquitlam.ca/bid">qfile.coquitlam.ca/bid</a>

- 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.)

A Proposal will be deemed to be successfully received when displayed as a 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 may 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 Communications with Proponents

Requests for clarification must be made in writing sent to email: <a href="mailto:bid@coquitlam.ca">bid@coquitlam.ca</a> quoting the RFP title and number.

It is the Proponent's responsibility to ensure that it seeks clarification on any matter relating to this RFP.

If a Proponent finds any discrepancies, omissions, ambiguities, or conflicts contained in this RFP, the Proponents should immediately notify the City. The City will review such notice and, if the City determines that an amendment is required to this RFP, the City will issue an addendum.

Questions must be submitted at least three (3) business days prior to the closing date.

#### 2.5 Addenda

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 and posted on the City's website: www.coquitlam.ca/bid opportunities

No oral conversation will affect or modify the terms of this RFP or may be relied upon by the Proponent.

Upon submitting a Proposal, Proponents are deemed to have received all Addenda 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 and the City's original file, the City's original file copy shall prevail.

#### 2.6 Acceptance Period for Proposals

The City requests that Proposals received as a result of this RFP be open for acceptance for a minimum period of 90 days from the Closing Date.

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

#### 2.8 No Contract

This RFP is not a tender process. 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 to or consideration by the City of any Proposal.

#### 2.9 No Binding Contract

The City may, after reviewing the Proposal(s) received, enter into discussions with any Proponent, without such discussions in any way creating a binding contract between the City and any such Proponent. There will be no binding agreement with the City until a formal, written agreement has been negotiated with a Proponent and the City has approved that agreement at which time, a Contract will be issued.

#### 2.10 No Solicitation

Proponents and their agents must 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 must disclose in their Proposals any actual or potential conflicts of interest and existing business relationships they may have with the City, its elected or appointed officials or employees.

#### 2.12 No Assignment

No Proponent may assign its Proposal or any rights in respect of it to any other party. Such an assignment or purported assignment will immediately invalidate the Proposal.

### 2.13 Withdrawal of Proposals

Proponents may withdraw their Proposals by written notice only, made by an authorized representative of the Proponent and sent to email: <a href="mailto:bid@coquitlam.ca">bid@coquitlam.ca</a> prior to the time set as the closing date and time for receiving Proposals.

#### 2.14 Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing their Proposals and for subsequent negotiations with the City, if any. The City will not be liable to any Proponent for any claims, whether costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

#### 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.

#### 2.16 Price

All prices must be stated in Canadian funds.

#### 3.0 SCOPE OF SERVICES

The successful Proponent will be providing the City with consulting and **Insurance Brokerage Services**.

It is anticipated that the successful Proponent will commence these Services in approximately October 2016 to work with City staff to prepare for upcoming policy renewals.

The successful Proponent must have experience in, and will provide expertise in many areas including, but not limited to, the following:

#### 3.1 Strategic Analysis and Marketing

- 1) Reviewing existing insurance policies and preparing policy renewal strategies in advance of policies' expiration;
- 2) Evaluating retention levels and coverage needs;
- 3) Providing information on emerging trends and market conditions;
- Conducting pre-marketing meetings to discuss insurance wording and marketing strategies;
- 5) Identifying and analyzing all viable markets for the City's insurance requirements;
- 6) Preparing marketing and underwriting information and submitting to potential insurers;
- 7) Making recommendations to maximize coverage and minimize costs.

#### 3.2 Placing Insurance

- 1) Evaluating the commitment and financial capacity of insurers;
- 2) Obtaining competitive insurance quotations;
- 3) Assisting the City to negotiate the most favourable rates and coverage;
- 4) Providing analysis of proposed policy wording and advising of changes to existing policies at renewal;
- 5) Preparing and reviewing policy documents;
- 6) Obtaining and reviewing insurance policies for accuracy;
- 7) Binding coverage, upon approval by the City;
- 8) Providing Certificates of Insurance as requested.

## 3.3 Reviewing Insurance Contracts and Documents

- 1) Providing professional opinion and recommendations regarding insurance and related risk management options, including indemnities and other forms of contractual risk transfer;
- 2) Reviewing the City's Certificates of Insurance required for contracts upon request;
- 3) Reviewing policies and providing professional opinion and recommendations upon request.

# 3.4 Professional Insurance and Risk Management Consulting

- Providing risk management and consulting services which increase the City's ability to effectively and efficiently manage the City's financial exposure to risk including alternate risk financing, risk transfer, cost of risk analysis, retention analysis etc.;
- 2) Providing a response to all inquiries relating to risk management issues;
- 3) Acting as City's insurance Broker, consultant and risk advisor, as applicable, with respect to the coverages;
- 4) Assisting with assessing the City's risk exposures;
- 5) Providing value added risk management services and reporting.

#### 3.5 General Requirements

- 1) Insurance experience in a local government setting
- 2) Experience assisting clients to resolve disputes with insurers;
- 3) Experience in assessing organizational exposure and providing guidance in the evaluation and management of a self-insured retention;
- 4) Providing standard response times for services included, but not limited to:
  - a. Placement of insurance coverages;
  - b. Generating policy documents including issuance of Certificates of Insurance;
  - c. Processing claims with insurers;
  - d. All inquiries in relation to risk management issues; and
  - e. Any other services proposed to be provided to the City that would enhance this RFP; and
- 5) Providing other risk management and related consulting services as needed.

#### 4.0 REFERENCE MATERIALS

Proponents should identify any relevant documents or data that would contribute to achieving the City's objectives.

#### 5.0 TERMS AND CONDITIONS OF CONTRACT

#### 5.1 Notification of Award

The City will notify the successful Proponent (described in the below Terms and Conditions as the "Broker") in writing of its decision to award the project by issue of a Contract

The following general conditions will apply to the Contract.

Proponents must include with their Proposal a full description of any proposed deviations from these Terms and Conditions, together with an explanation of why they are unable to comply with these Terms and Conditions.

#### 5.2 Insurance

The Broker must submit, upon award by the, a Certificate of Insurance signed by the Broker's insurer certifying that the required insurance policies are in force and that:

- 5.2.1 The City of Coquitlam is "additional insured";
- 5.2.2 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;
- 5.2.3 Such certificate shall be in the form of Certificate of Insurance Broker Form
- 5.2.4 The Broker carries:
  - 5.2.4.1 Commercial General Liability Insurance satisfactory to the City in the amount of TWO MILLION DOLLARS (\$2,000,000) inclusive per occurrence; and
  - 5.2.4.2 Professional Liability Insurance for the Broker's legal liability for errors, omissions and negligent acts, to the extent of not less than TWO MILLION DOLLARS (\$2,000,000) per claim.

#### 5.3 <u>Indemnity</u>

The Broker will indemnify and save harmless the City, its employees and agents from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained by the City at any time or times, (either before or after the expiration or sooner termination of this Contract) where the same or any of them are based upon or arise out of or from anything done or omitted to be done by the Broker or by any servant, employee, officer, director or agent of the Broker pursuant to the Contract.

#### 5.4 WorkSafeBC

The Broker shall be in good standing with WorkSafeBC and provide a WorkSafeBC Registration Number.

#### 5.5 Business Licence Requirement

The Broker will, at its sole cost, apply for and maintain a valid Coquitlam business licence or Tri Cities intermunicipal business Licence for the term of the Contract.

For information, contact the City Business Licences Division (phone 604-927-3085) or apply on-line at website:

City of Coquitlam Business Licence

#### 5.6 Permits

The Broker will provide and pay for all licences and permits required to lawfully carry out the Services.

#### 5.7 Subcontracting

The Broker will not, without the written consent of the City of Coquitlam, assign, subcontract or transfer the Contract or any part thereof.

#### 5.8 Confidentiality of Information

The Broker agrees that proprietary City information obtained as a result of its provision of the Services is confidential and must not be disclosed without the written authorization from the City.

#### 5.9 Advertisement

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

#### 5.10 Intellectual Property Rights

The City will become the owner of all reports, analysis and any other materials requested from and provided by the Broker to the City during the Contract.

#### 5.11 Default

The City reserves the right, at its sole discretion, to immediately terminate the Contract, in whole or in part, and utilize the services of any other Broker, if the Broker:

- 5.11.1 Fails to perform any part of the Services within the time specified, or within a reasonable amount of time if no time is specified, as determined by the City;
- 5.11.2 Fails to maintain the required professional licences or designations to lawfully provide insurance brokerage services in British Columbia;
- 5.11.3 Fails to meet the City's standard of expected and agreed level of service and performance;
- 5.11.4 Be adjudged bankrupt or makes general assignment for the benefit of creditors.

Time is of the essence.

# 5.12 Cancellation

The Contract may be cancelled by either party for any reason without cause or penalty upon 30 days written notice.

Pro-rata payment will be made to the Broker for Services provided as of the date of cancellation.

#### 5.13 Dispute Resolution

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

 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.

- 2. <u>Mediation</u> 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 a dispute with the assistance of the mediator. The place of mediation will be Vancouver, British Columbia. Each party will bear its own costs of participating in the mediation.
- 3. <u>Litigation</u> 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. The place of litigation shall be in the Metro Vancouver, British Columbia area.

#### 5.14 Invoice and Payment

The Broker will submit invoices for Services that have been provided to the City.

- a) Invoices must be sent in .pdf format sent to email: apinvoices@coquitlam.ca
- b) All invoices must include the Contract number as provided by the City.
- c) The Broker will be paid net 30 days from receipt of invoice and acceptance of the goods and/or Services, whichever is the later, unless alternate payment terms have been agreed to between the Broker and the City.
- d) Invoices must show taxes separately.

#### 6.0 EVALUATION CRITERIA

#### 6.1 Evaluation Committee

The evaluation of Proposals will be undertaken on behalf of the City by an evaluation Committee appointed by the City.

#### 6.2 Evaluation Criteria

Proposals will be evaluated on the basis of the overall best value to the City based on quality, service, price and any of the below criteria, which are not listed in order of preference, points, value, priority or rank:

#### **Mandatory Requirements**

- 1) Licensed to do business in the Province of British Columbia;
- 2) Current contracts with local government clients;
- 3) Experience and demonstrated understanding of insurance, self-insured retentions and risk issues of one or more local government(s) similar in size and scope to the City of Coquitlam;
- 4) Established, reputable, regularly staffed business office in the Metro Vancouver area:
- 5) CV's for key personnel--no more than 1 page each.

#### **Personnel Qualifications and Experience**

 Professional qualified personnel with, demonstrated skills, experience and expertise in insurance preferably within a local government setting as well as claims handling and general risk management.

#### **Methodology & Approach**

- 1) Methodology and approach
- 2) Service and support

#### **Fee Schedule and Cost of Services**

- 1) Fees
- 2) Value Added Benefits

#### **Selection Process**

- 1) The criteria above will be scored and based on the results, one or more Proponent(s) may be invited for an interview for the City to meet the Proponent team and confirm the expectations of the City will be met.
- 2) Interview(s) will be scored if the City interviews more than one Proponent.
- 3) References may be verified.

No prices, totals, weighs or scores will be provided to any Proponents.

Preference will be given to established, reputable Proponents with a regularly staffed business office in the Metro Vancouver area as well as those who can demonstrate current experience working with local governments.

The City may award the Contract to the Proponent whose submission, in the City's sole discretion, provides the best overall value to the City for the Services. In evaluating the overall value to the City, the City, in addition to price, will have in mind its critical goals of obtaining a high quality product in accordance with the scope established under the Request for Proposal documents.

The lowest Proposal may not necessarily be accepted, but rather will be analyzed to determine best overall value to the City.

The City reserves the right to award the brokerage Services in respect of its liability insurance and property insurance policies to separate Proponents.

The City may request additional information from one or more Proponent(s), which information may be considered in the evaluation.

# 6.3 Acceptance of Proposals

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 interest of the City that provides best value.

#### 6.4 Negotiation

The City reserves the right to accept or reject any or all Proposals or, prior to award, to negotiate changes to the scope of Services, including pricing with 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.

The City may enter into a changed or different scope of Services with the Proponent proposing "best value", without liability to Proponents that are not awarded the Contract.

## 6.5 Contract

Award will be made by issue of a City Purchase Order (PO) or Purchase Contract (PC) incorporating the information contained in this RFP, the City's "Terms and Conditions of Contract" outlined in Section 4 of this RFP and the City's standard "Terms and Conditions of Purchase" which are located on the City's website: <a href="https://www.coquitlam.ca">www.coquitlam.ca</a>, the accepted Proposal, addenda and subsequent clarifications, discussions and correspondence, the totality of which will constitute the Contract.

# **APPENDIX A**

# **City's Current Policies**

|   | Policies                | Limits                 | Expiry      |
|---|-------------------------|------------------------|-------------|
| 1 | CGL                     | \$5,000,000            | 30-Dec-2016 |
| 2 | Umbrella Liability      | \$25,000,000           | 30-Dec-2016 |
| 3 | Property                | \$550,000,00 (approx.) | 1-June-2017 |
| 4 | Boiler and Machinery    | \$75,000,000 (approx.) | 1-June-2017 |
|   | (Direct Damage and      |                        |             |
|   | Business Interruption)  |                        |             |
| 5 | Crime                   | \$1,000,000            | 1-June-2017 |
| 6 | Corporate Directors and | \$5,000,000            | 5-Feb-2017  |
|   | Officers Liability      |                        |             |
| 7 | User Group Liability    | \$2,000,000            | 1-Jan-2017  |
| 8 | Volunteer AD&D          | \$50,000/ \$25,000     | 1-Jan-2017  |

ICBC Fleet insurance program is excluded.



# City of Coquitlam REQUEST FOR PROPOSALS RFP No. 16-03-09

# **Insurance Brokerage Services**

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

Thursday, June 23, 2016

(Closing date and time)

#### **INSTRUCTIONS FOR PROPOSAL SUBMISSION**

Proposal submissions are to be consolidated into one (1) .pdf file and uploaded electronically through QFile, the City's file transfer service accessed at website: 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 to allow ample time to complete the Proposal Submission process. If assistance is required phone 604-927-3060.

| Proposal Submission Form Complete and return this section: |                |  |
|--|----------------|--|
| Submitted by:  |                |  |
|  | (company name) |  |

#### **PROPOSAL SUBMISSION**

As the City maintains both liability (and related) insurance policies and property (and related) insurance policy, Proponents are invited to submit proposals in one of three categories:

**Option 1: Liability Only**- Review, analyze, market and bind insurance coverages for the City's liability policies;

OR

**Option 2: Property Only** - Review, analyze, market and bind insurance coverages for the City's property policies;

OR

**Option 3: Both Liability and Property** - Review, analyze, market and bind insurance coverages for both the City's liability and property policies.

Please indicate below the category your firm is applying for:

|    | Category                              | Yes |
|----|---------------------------------------|-----|
| 1. | Liability Insurance Only              |     |
| 2. | Property Insurance Only               |     |
| 3. | Both Liability and Property Insurance |     |

#### \*\*Please Note\*\*

- In addressing each criterion all Proposals must be submitted using the numbering format below.
- > Failure to follow this parameter may result in the rejection of the Proposal.
- Attach pages as needed referencing the numbering format listed below.

# 1.0 Mandatory Requirements of RFP

The City has identified key mandatory requirements the Proponent must meet to successfully provide the Services. The Proponent must complete the information for the respective items listed within the following table. Non-compliance with these Mandatory Requirements may result in the Proposal being set aside and given no further consideration.

|   | Mandatory Requirement   | Complies (YES/NO) Comments |
|---|---|----------------------------|
| 1 | Licensed to do business in the Province of British<br>Columbia  |                            |
| 2 | Current contracts with local government clients   |                            |
| 3 | Experience and demonstrated understanding of insurance, self-insured retentions and risk issues of one or more local government(s) similar in size and scope to the City of Coquitlam |                            |
| 4 | Established, reputable, regularly staffed business office in the Metro Vancouver area   |                            |
| 5 | Brief CVs for key personnel no more than 1 page each  |                            |

#### 2.0 Fee Schedule and Cost Of Services

Provide an annual fee for Broker remuneration inclusive of all the services listed in Scope of Services relevant to whichever of the three options your Proposal relates (i.e. liability insurance services only OR property insurance services ONLY or both liability and property insurance services)

Prices are to be firm and include all of the Services for the five (5) year Contract term.

Disbursements and all overhead charges are to be included in the annual fee and are considered to be a cost of doing business.

|   | Year  | Liability Insurance<br>Annual Broker Fee<br>(Complete if Option 1<br>Selected) | Property/Boiler & Machinery/Crime Insurance Annual Broker Fee (Complete if Option 2 Selected) | Liability and Property Insurance Annual Fee (Complete if Option 3 Selected) |
|---|-------|--|---|---|
| 1 | 2016  | \$   | \$  | \$  |
|   | Oct - |  |   |   |
|   | Dec   |  |   |   |
| 2 | 2017  |  |   |   |
| 3 | 2018  |  |   |   |
| 4 | 2019  |  |   |   |
| 5 | 2020  |  |   |   |
| 6 | 2021  |  |   |   |

**1) Optional Services** – Proponents are to provide rates and fees for additional optional services offered to the City, if any.

|   | Year    | Description of Service | Fee |
|---|---------|------------------------|-----|
| 1 | 2016    |                        | \$  |
|   | Oct-Dec |                        |     |
| 2 | 2017    |                        |     |
| 3 | 2018    |                        |     |
| 4 | 2019    |                        |     |
| 5 | 2020    |                        |     |
| 6 | 2021    |                        |     |

#### 3.0 Personnel – Qualifications and Experience

- 3.1 Professional qualified personnel with, demonstrated skills, experience and expertise in insurance preferably within a local government setting as well as claims handling and general risk management.
- 3.2 Identify key personnel that will be assigned to the City and describe their roles within your organization and what part(s) of the Services they will provide to the City. Include with your Proposal submission a brief CV for each limited to 1 page maximum.
- 3.3 Identify any sub-consultants and describe their roles and experience.

#### 4.0 Methodology and Approach

- 4.1 A brief outline of the Proponent's understanding of the Services.
- 4.2 Description of a detailed work plan and methodology to provide the Services as outlined in Section 3 Scope of Services.
- 4.3 Describe how the Proponent will measure and report on quality assurance and provide on-going service and support to the City.
- 4.4 Demonstrate cost savings measures that the Proponent has introduced for other local governments or clients.

#### 5.0 Value Added Benefits

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 or the community.

# 6.0 Recent Experience and References

Experience should include current and recent contracts with local government clients similar in size, scope and complexity to the City of Coquitlam.

By submitting a Proposal, Proponents authorize the City to verify information provided to confirm client satisfaction and demonstrated success. The City will not discuss reference information provided by these clients with any Proponents.

| Year Started   |  |
|--|--|
| Year Completed                                       |  |
| <b>Description of Contract</b>                       |  |
| Company  |  |
| Contact Person                                       |  |
| Telephone and Email                                  |  |
| Contract Value                                       |  |
| Proponent Team Members Involved on this Portfolio    |  |
| Year Started   |  |
|  |  |
| Year Completed                                       |  |
| Description of Contract                              |  |
| Company  |  |
| <b>Contact Person</b>                                |  |
| Telephone and Email                                  |  |
| Contract Value                                       |  |
| Proponent Team Members<br>Involved on this Portfolio |  |
| Year Started   |  |
| Year Completed                                       |  |
| Description of Contract                              |  |
| Company  |  |
| <b>Contact Person</b>                                |  |
| Telephone and Email                                  |  |
| Contract Value                                       |  |
| <b>Proponent Team Members</b>                        |  |
| Involved on this Portfolio                           |  |

## 7.0 Conflict of Interest Declaration

Proponents must disclose any actual or potential conflicts of interest and existing business relationships they may have with the City, its elected or appointed officials or employees.

# 8.0 Period for Acceptance of Proposal

| The City of Coquitlam requests Proposals to remain open for acceptance for a |
|--|
| minimum of 90 days.  |

| Our Proposal will remain open for acceptance by the City for a peric | d of |
|--|------|
| days from the Closing Date.  |      |

#### 9.0 Addenda

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

| Addendum No. | Date Issued |
|--------------|-------------|
|              |             |
|              |             |
|              |             |

## 10.0 Authorization

We hereby submit our Proposal for the services as specified and undertake to carry out the work in strict accordance with all referenced Terms & Conditions, Regulations and Codes, applicable to this RFP:

| Company Name:  |  |
|--|--|
| Address:   |  |
| Phone:   |  |
| GST Registration No.:  |  |
| Project Contact: Name and Title of Individual for communication related to this RFP (please print) |  |
| Contact Email:   |  |
| Name & Title of Authorized Signatory: (please print)   |  |
| Signature:   |  |
| Date:  |  |

The signature is an authorized person of the organization and declares the statements made in their submission are true and accurate.

For the purpose of this RFP, electronic signatures will be accepted.

- End of Proposal Submission Form -