

City of Coquitlam

Request for Proposals

RFP No. 17-03-10

Housing Choices Review:
Urban Land Economic Analysis &
Architectural Testing

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[PROPOSAL SUBMISSION FORM](#) (includes Appendix A - Schedule of Effort & Fees)

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 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” 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 this Request for Proposals 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.

“Contract Administrator” means the Consultant’s representative who will act on its behalf with respect to duties and authorities, who will liaise with the City for the duration of the project as outlined in this RFP.

“Project Manager” means the City staff member appointed by the City who will act on its behalf with respect to duties and authorities as outlined in this RFP.

“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, deliverables and expectations as further described in this RFP.

“Work” shall unless the context otherwise requires, mean the whole of the work, tools, materials, labour, equipment, travel, and all that is required to be done, furnished and performed by the Consultant.

1.0 INTRODUCTION

1.1 Request for Proposals

The City of Coquitlam (“City”) requests proposals from professional, qualified and experienced firms to provide **Urban Land Economic Analysis and Architectural Testing** (the “Services”) to support the Housing Choices Review in Coquitlam, BC.

1.2 Obtaining RFP Documents

RFP documents are available for downloading from the City’s website:
[City of Coquitlam - Current Bid Opportunities](#)

1.3 Project Description

Providing for new housing choices in established low-density neighbourhoods is an important policy direction of the *Southwest Coquitlam Area Plan* (SWCAP), and in early 2011 Council implemented the Housing Choices Program through the *Neighbourhood Attached Residential (NAR)* land use designation in several areas of Southwest Coquitlam.

Coquitlam’s Housing Choices Program provides for innovative, small-scale, ground-oriented, infill housing options in several established neighbourhoods in Southwest Coquitlam. These housing forms accommodate up to four dwelling units per lot and include carriage houses and garden cottages (i.e. laneway forms), narrow lot single-family, duplexes, triplexes, and quadruplexes. The Housing Choices Program provides an important niche in the housing market and helps to provide a broader range of housing options for a wide diversity of families in areas surrounding our Urban and Neighbourhood Centres.

To date, 98 Housing Choices projects totaling 194 units have been completed. Now that these ‘first wave’ projects are complete it is timely to undertake a review to determine what regulatory tweaks may be necessary to continue to fulfill the objectives of the program and ensure a high standard of development.

The Housing Choices Review will analyze and refine the existing Housing Choices Program, in order to increase the number of Housing Choices projects, streamline regulations, and ensure that the resulting development projects continue to fit in with the surrounding neighbourhoods. The Housing Choices Review project is a “B” priority in the City’s 2017 Business Plan under the strategic goal of Achieve Excellence in Governance – Key Plans, Strategies and Policy Updates. Additional information on the [Housing Choices Program and Review](#) is available on the City’s website.

The Housing Choices program assists with meeting several policy objectives of the Official Community Plan to provide a range of housing options that meet the needs of a diverse range of families and revitalize older neighbourhoods of Coquitlam. The

Housing Choices program also implements several policy directions under Objective 1 of the Housing Affordability Strategy (HAS) which seeks to foster housing affordability through innovation to expand the range of housing options.

1.4 Project Budget

The City has allocated \$50,000 for the Urban Land Economic Analysis and Architectural Testing work. However, the City will select a proposal that provides best value based on the Evaluation Criteria outlined in Section 8.

All components of the project should be provided within the budget allocated. If your firm is unable to provide the full scope of services within the allocated budget then your proposal must indicate which components/requirements can be completed and delivered within the budget and a breakdown of the individual component cost, as well as the total cost to deliver all of the remaining components/requirements.

1.5 Community Context

Coquitlam is one of the fastest growing municipalities in Metro Vancouver, with an existing population of 139,284. The Millennium Line-Evergreen Extension SkyTrain Line is a significant long-term transportation investment for Coquitlam that is improving transportation choice for residents and helping shape growth over the long term. The City is projected to increase by over 85,000-90,000 people in the next 30 years, potentially reaching a population of over 225,000 by 2046. The majority of this growth will be redevelopment in the existing urbanized area (including our Urban Centres along the Evergreen Line corridor). Approximately 10% of this growth is estimated to be accommodated by the Housing Choices Program. Significant new development pressures and changing housing market conditions make it a good time to revisit the Housing Choices Program.

1.6 Project Objective

The City of Coquitlam has an opportunity to build on the existing Housing Choices Program through the consideration of a broader range of housing types and an expansion of the Housing Choices boundaries. Identifying ways to improve implementation and project approvals will need to strategically consider and identify key opportunities and challenges as the program is expanded into other areas of Southwest Coquitlam.

The key objectives of the Housing Choices Review are to:

- Identify ways to increase the number of duplex, triplex, and quadruplex developments that occur each year;
- Foster expanded housing options for a diverse range of household types and to improve housing affordability;
- Promote sensitive infill development that refreshes and fits into existing neighbourhoods; and
- Improve the implementation of the Housing Choices Program through streamlined regulations and application processing.

Once complete, key outcomes of the Housing Choices Review are intended to include:

- Review of the Housing Choices projects completed to date;
- Housing urban land economic analysis and architectural testing of concepts (i.e. the Services);
- Review and update of the RT-1, RT-3, RS-1, and RS-3 zones, as necessary;
- Update the Development Permit Guidelines for improved clarity and design guidance;
- Potential expansion of NAR-designated areas;
- Review and update of one-family zones to encourage gentle densification and more housing options in other areas of Southwest Coquitlam;
- Investigation of a potential future Southwest Coquitlam Area Plan update, including scoping a Corridor Development Strategy; and
- Improved Housing Choices Program communication materials.

The purpose of the consultant services is to support the Housing Choices Review that is being led by City staff, by producing urban land economic analysis and architectural testing components that will be key inputs into this project. This work will primarily be conducted by the consultant(s) in Phase 1 of the Housing Choices Review (Fall 2017), with deliverables due early in Phase 2 (early 2018), to inform proposed amendments to the Housing Choices Program later in this Phase. Staff may request additional architectural testing work as a result of input received through the public feedback portion of Phase 2, which would be an additional scope of work to be conducted by the consultant(s) at staff request in 2018.

The objective of the consultancy is to:

Provide an Urban Land Economic Analysis that addresses the following:

- Identify the policy, zoning and other regulatory implications of various market factors for Housing Choices developments.
- Prepare the development pro forma(s) for typical Housing Choices projects and analyze their economic and market position relative to other development types (i.e. large single-family).
- Recommend policy, zoning, and other regulatory amendments to encourage wider take-up of Housing Choices projects that meet project goals.

Provide Architectural Testing that addresses the following:

- Identify comparative examples of “Housing Choices” type development across the region that may be viable in Coquitlam.
- Beyond the existing examples, test and analyze proposed policy and zoning amendments for all Housing Choices typologies to assess if the amendments create the desired outcomes and to identify any potential issues and challenges.
- Inform the larger Housing Choices Review process.

2.0 PROJECT REQUIREMENTS

2.1 Consultancy Prerequisites

The Consultant team should have demonstrated skills, knowledge and expertise in the following fields to complete this assignment:

- Municipal land use policy and zoning regulations;
- Infill housing planning and design;
- Architectural design and site planning; and
- Housing market and pro-forma analysis.

The Consultant(s) should have urban land economic analysis and architectural design as core components of their business, and be able to provide leadership to and management of the Consultant team through experience, local knowledge, innovation in design and a philosophy that is compatible with the City's vision for Planning and Development.

3.0 SCOPE OF SERVICES

3.1 Overview

The successful Proponent (the “Consultant”) will provide **Urban Land Economic Analysis and Architectural Testing** (the “Services”) to support the Housing Choices Review, based on the Scope of Services, which includes, but is not limited to, the following:

3.1.1 Urban Land Economic Position

Identify the advantages and disadvantages that influence the position of the Housing Choices product type to compete for a share of overall residential markets relative to other product types and areas in the region. This should include a review of the policy, zoning and other regulatory implications on various economic factors for Housing Choices developments with the following focus:

- Identify all incentives that the City might use to attract more residential infill housing;
- Identify policy and regulations that the City might use to encourage infill housing with a specific focus on increasing the number of higher-density Housing Choices projects (duplex, triplex, and quadruplex); and
- Review current City of Coquitlam policy and regulations to identify challenges that inhibit or discourage Housing Choices developments (in particular higher-density projects, i.e. duplex, triplex, quadruplex).

3.1.2 Market Trends

Assess the current characteristics of Housing Choices product types across the Region and identify trends in new small-scale, low-rise, ground-oriented, infill residential products that may be viable in Coquitlam.

3.1.3 Architectural Testing

Beyond the existing examples, test and analyze proposed policy and zoning amendments for all Housing Choices typologies to assess if the amendments create the desired scale, massing and site design outcomes and to identify any potential issues and challenges.

3.1.4 Sample Pro Forma(s)

Review and analyze the development pro forma(s) for several typical Housing Choices projects and compare and contrast their economic and market position relative to the other development types (e.g. infill vs. large single-family or narrow-lot split, and strata vs. freehold).

3.1.5 Recommendations and Strategic Directions

The report provided by the Consultant should recommend:

- The policy, zoning and regulatory amendments to encourage a wider take-up of preferred Housing Choices forms that meet project goals.
- Strategic directions to guide future amendments to the Housing Choices Program based on local and regional market position that is supported by trends in new small-scale, low-rise, ground-oriented, infill residential products throughout the Region that may be viable in Coquitlam.

3.2 Process

The tasks and responsibilities listed below are a guideline. Proponents are to identify any additional tasks and associated responsibilities that may be required to complete the Services.

	Responsibility	Task
1	Staff/Consultant	'Start up' meeting with the Housing Choices Review project staff team, including the project manager and division manager, and the Consultant team.
2	Consultant	Review all relevant City of Coquitlam policy, zoning, and regulations relating to the Housing Choices Program and development project approvals.
3	Consultant	Ongoing liaison and presenting key findings to the project manager (regarding progress, direction, input, and additional information requests), and acquiring input at key milestones in the process.
4	Consultant	Producing a Preliminary Memo of the initial findings, including preliminary rough sketches or drawings, for review by City staff before proceeding with the Draft Report.
5	Staff/Consultant	Meeting with project manager and division manager upon completion of the Preliminary Memo to discuss initial findings and directions, and solicit staff feedback.

3.2 Process (cont'd)

	Responsibility	Task
6	Consultant	<p>Prepare a Draft Report incorporating the comments and feedback provided on the Preliminary Memo following City staff review, which will include (at a minimum) the following:</p> <ul style="list-style-type: none"> • An executive summary • Presentation of all data generated or collated, either within the text of the report or in technical appendices • Sketches, drawings, maps, and graphics (as appropriate) • A description of the research methodology, including a complete list of all data sources and key informants • The findings of analysis and research in response to the five (5) key work tasks (the Services); and • An identification of additional recommendations and possible “next steps”.
7	Staff/Consultant	Meeting with project manager and division manager upon completion of the Draft Report to discuss findings and recommendations.
8	Staff	Housing Choices Review – Phase 2 public feedback on proposed amendments and Housing Choices potential expansion areas.
9	Consultant	If required and as an additional scope of work, consultant(s) to perform additional architectural testing/analyses at City staff request (based on outcomes of Phase 2 public feedback).
10	Consultant	Prepare a Final Report incorporating the City staff comments and feedback provided on the Draft Report, and including any additional work requested by City staff as result of Phase 2 public input.
11	Staff/Consultant	Meeting with project manager and division manager upon completion of the Final Report to discuss findings and recommendations. All digital deliverables shall be provided both as an electronic pdf format and a native (editable) format.

4.0 PROJECT ORGANIZATION AND MANAGEMENT

The Consultant will work with Planning and Development staff and with other City Departments, including in-person update meetings as required.

The City's Project Manager will solicit feedback from key staff at each phase of project development and may involve a small group of additional staff in meetings with the Consultant. It is intended that the Consultant work collaboratively with the Project Manager and other City staff, as required, throughout the process.

The Consultant will be responsible for recording all meeting minutes, including significant proceedings and decisions, identifying 'action by' parties, and will reproduce and distribute copies of minutes within two (2) working days after each meeting. The Consultant will transmit the meeting minutes to meeting participants including those who were not in attendance.

The Consultant will lead and otherwise be responsible for all elements of the Services, including reporting at key milestones, timely communications with the City's Project Manager on emerging project issues, and maintaining complete documentation (i.e. minutes, presentations) from internal and external meetings.

5.0 PROJECT SCHEDULE

5.1 Project Schedule

- .1 The Consultant is responsible for their availability and ability to meet time schedule and completion dates. Proponents are to confirm they will meet the City’s expectations with a written acknowledgement of the ability to deliver the required Services to the City given the Proponents’ existing workload and future commitments.
- .2 The preliminary project schedule, milestones of the project, and associate deliverables are outlined below.

**PROPOSED WORK SCHEDULE AND MILESTONE DATES:
Housing Choices Review – Urban Land Economic Analysis and Architectural Testing**

<u>ITEM NO.</u>	<u>KEY MILESTONES</u>	<u>TARGET DATES</u>
0.0	Consultant Selection	October 6, 2017 (anticipated)
Part 1	Background Research & Preliminary Memo	
1.0	‘Kick off’ & subsequent meetings with staff (anticipate 3-4 meetings total)	October 10 – December 8, 2017
2.0	Background research & analysis	
3.0	Preliminary Memo development	
4.0	Deliverable: Preliminary Memo to staff	December 8, 2017
5.0	Preliminary Memo feedback from staff	December 22, 2017
Part 2	Draft Report	
6.0	Draft Report development	January 3 - 31, 2018
7.0	Deliverable: Draft Report to staff	January 31, 2018
-	<i>Led by Staff: Housing Choices Review – Phase 2 Public Feedback Period (consultant participation not required)</i>	<i>February 15 – March 31, 2018</i>
Part 3	Final Report	
8.0	Additional architectural testing/analyses, if required by City staff and as an additional scope of work (based on outcomes of Phase 2 Public Feedback) & Final Report development	April 1 – 27, 2018
9.0	Deliverable: additional architectural testing/analyses (if required) & Final Report to staff	April 27, 2018

5.2 Documents and Drawings

- .1 The Consultant will provide original documents and drawings, and transfer final digital files to the City. The Format of the digital files will be compatible with the City's versions of AutoCAD, Creative Suite, MS Suite and PDF's. Digital file transfer is to be electronically through the City's file transfer portal and email to City staff.

5.3 Fee Schedule and Cost of Services

- .1 Proponents shall submit with their proposal, a **Schedule of Effort and Fees – Appendix A**, for all of the Services outlining level of effort by each team member, including hourly rates and total lump sum fee. The hourly rates will be used to value additional services if required. The fee schedule should show the maximum upset limits that the Consulting Team will not exceed unless the City's Project Manager requests additional services which are beyond the Scope of Work as outlined in this RFP.
- .2 The Proponent shall include in the fee schedule all sub Consultant fees and all Consulting Team disbursements.
- .3 The Proponent shall indicate any additional 'Optional Services' or costs not accounted for in the fee schedule as part of the proposal submission.
- .4 The successful Consultant will not be able to claim any additional cost as a result of changes to the Schedule or order of works. This condition shall be in effect for the duration of the project.
- .5 **Disbursements** for which the Consultant or Sub-Consultant shall be entitled to reimbursement by the City shall be restricted to those identified below.

Those requiring specific authorization by the City's Project Manager include:

- .1 Actual fees and authorized disbursements for specialized other Consultants when retained upon request by the City Project Manager;
- .2 Actual costs for obtaining information from external agencies such as BC Hydro, Telus, Terasen, Cablevision, etc;
- .3 Actual costs for applications or permits for work obtained by the Consultant on behalf of the City;
- .4 Actual costs or expenses to provide and/or operate specialized equipment;
- .5 Testing agency vehicles and equipment;
- .6 Permits.

The Consultant will **NOT** be reimbursed and shall include in the total fees the following:

- .1 Drafting (AutoCAD, manual, supplies);
- .2 Clerical (typing, word processing, correspondence, photocopying, mail - local and long distance);
- .3 Computer use;
- .4 Courier and freight charges;
- .5 Telephone (local, cellular, local faxes);
- .6 Travel (parking, mileage, vehicle, auto & taxi expenses, accommodation & meals);
- .7 Copying (i.e. correspondence, Consultants in-house copying & draft of reports);
- .8 Reprographics (Consultants in-house drawings reproduction, review drawings and specifications, reports for sub-Consultants review);
- .9 Expenses for non-local Sub Consultants;
- .10 Professional Insurance.

The 'Consulting Services Fee Total' will form the budget for the full scope of work, including all details and deliverables specified in this RFP.

The Fee total includes business administration services, disbursements, costs, charges, expenses, of any sort (excluding GST) for the Consultant to complete the Project to the City's standards in accordance with the work schedule provided in this RFP.

6.0 REFERENCE MATERIALS

Proponents should identify any 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.

Information that will be made available to the Consultant includes:

- Housing Choice Study for Southwest Coquitlam: Phase 1, 2, and 3 (2008)
- Southwest Coquitlam Area Plan (2009)
- Maillardville Neighbourhood Plan (2014)
- Austin Heights Neighbourhood Plan (2010)
- Burquitlam-Lougheed Neighbourhood Plan (2017)
- Coquitlam Duplex Design Guidelines (2006)
- Citywide Official Community Plan, Part 4 – Urban Design and Development Permit Areas (2013)
- Coquitlam Zoning Bylaw, in particular:
 - Part 7 “Off-street Parking and Loading”
 - RT-1 Zone “Two-Family Residential”
 - RT-3 Zone “Triplex and Quadruplex Residential”
- GIS mapping data
- Development Permit and Building Permit data
- Data on Housing Choices projects completed to date
- Any other information that the project team deems relevant

The Consultant will work with the City to gather any additional information required to complete the Services.

7.0 INSTRUCTIONS TO PROPONENTS

7.1 All Proposals Public

The City is bound by the provisions of the Freedom of Information and Protection of Privacy Legislation of British Columbia. Proponents are advised that proposals will 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.

7.2 Closing Date & Time

Proposals will be received on or before **2:00 p.m. (local time)**

Tuesday, September 26, 2017

7.3 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: 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.)

Proposals 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 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.

7.4 Enquiries

Questions are to be submitted in writing within 3 business days of the RFP closing date sent to email: bid@coquitlam.ca 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 Proponents find any discrepancies, omissions, ambiguities, or conflicts contained in this RFP, 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.

7.5 Addenda

Proponents are responsible to check the City’s website for any updates and addenda issued at website: www.coquitlam.ca/bid_opportunities

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:

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; the City’s original file copy shall prevail.

7.6 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 60 days from the Closing Date.

The City of Coquitlam 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.

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 will be issued for the provision of these services.

7.7 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.

7.8 No Contract

This 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 or consideration by the City of any Proposal.

7.9 No Binding Contract

The City may, after reviewing the proposal 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 City Purchase Order will be issued.

7.10 No 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.

7.11 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, its elected or appointed officials or employees.

7.12 No Assignment

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

7.13 Sub-Consultants

The use of sub-Consultants is acceptable providing they are fully identified in the proposal and realize the conditions of this document will apply to all Consultants named. Joint submissions must identify a prime Proponent who assumes responsibility for the Proposal as well as for the professional standards, actions and performance for all Proponents, if awarded the work.

7.14 Withdrawal of Proposals

Proponents may be withdrawn by written notice only, made by an authorized representative of the Proponent sent to email bid@coquitlam.ca prior to the time set as Closing Date and time for receiving Proposals.

7.15 Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing a proposal 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.

7.16 Law

The RFP and any resultant award shall be governed by and construed in accordance with the laws of the Province of British Columbia.

7.17 Price

All Prices shall be in Canadian Funds and shall remain **FIRM** for the duration of the Housing Choices Review development process outlined.

8.0 EVALUATION CRITERIA

8.1 Evaluation Committee

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

8.2 Evaluation Criteria

Proposals will be evaluated to determine the Proposal that is most advantageous to the City, using the following criteria:

Corporate

- 1) Project Understanding - Comprehensive understanding of the project objectives, outcomes and vision; major issues and opportunities presented in the proposal;
- 2) Project Team - description and role of Consultant team members and any sub-Consultants; Experience and Qualifications of team members;
- 3) Corporate Experience and References - provide examples of similar successful projects, project dates, client names and contact information, description of team members role in each project;

Technical

- 1) Proposed methodology, work plan and approach, including breakdown of tasks necessary to complete the project;
- 2) Availability and time schedule;

Financial and Value Added Benefits

- 1) Fee Schedule - Fee matrix with hourly rates and charges by level of effort (hours) associated to task and total lump sum fee including disbursements (exclude GST);
- 2) Value Added Benefits to the City - Describe your competitive advantage, value added services and benefits that would be provided to the City.

The lowest price Proposal may not necessarily be accepted; rather all proposals will be analyzed to determine best overall value to the City.

The City may compare proposals to select the one that is most advantageous.

The City may request additional information from one or more proponents which would also be considered in the evaluation. Interviews may be conducted with the highest ranked company(s) and considered in the evaluation.

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

8.3 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.

8.4 Contract

Award will be made by issue of a City Purchase Order (PO) incorporating the information contained in this RFP including addenda and any subsequent information.

9.0 TERMS AND CONDITIONS OF CONTRACT

9.1 Notification of Award

The City will notify the successful Proponent (the “Consultant”) in writing of its decision to award the project by issue of a City Purchase Order (PO) that will incorporate this RFP documentation including all addenda issued, and the accepted Proposal.

The City’s [Terms and Conditions of Purchase](#) are located on the City’s website: www.coquitlam.ca and will apply to this Contract including the items that are detailed in this section.

Proponents are to include with their proposal submission a full description of any deviations if they are unable to comply with any of these general conditions.

9.2 Insurance

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

- .1 The City of Coquitlam is to be named as “additional insured”;
- .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;
- .3 Such certificate shall be in the form of [Certificate of Insurance - Consultant Form](#)
- .4 The Consultant shall carry Commercial General Liability Insurance satisfactory to the City in the amount of TWO MILLION DOLLARS (\$2,000,000.) inclusive per occurrence;
- .5 The Professional Liability Insurance policy shall insure the Consultant’s legal liability for errors, omissions and negligent acts, to the extent of not less than \$500,000 per claim and \$1,000,000 Aggregate.

9.3 Indemnity

The Consultant 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 agreement) 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 Consultant or by any servant, employee, officer, director or sub-Consultant of the Consultant pursuant to the Contract.

9.4 WorkSafeBC

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

9.5 Business License Requirement

The Consultant will be required to provide evidence of a valid Coquitlam Business License or Tri Cities Intermunicipal Business License prior to commencement of the services.

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

[City of Coquitlam Business License](#)

9.6 Permits

The Consultant will provide and pay for all licenses and permits required to carry out the work for which, the City will reimburse the Consultant the cost of the permit.

9.7 Subletting

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

9.8 Confidentiality of Information

The Consultant shall not disclose any information provided by the City, specifically proprietary, sensitive, personal or confidential information or that developed resulting through the performance of this agreement to any other party without the express written consent of the City. All information provided to the Consultant or developed by the Consultant pursuant to this agreement shall be returned to the City upon the expiration of this agreement. The Consultant acknowledges that the City is subject to the *Freedom of Information and Protection of Privacy Act of British Columbia*.

9.9 Advertisement

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

9.10 Intellectual Property Rights

The City shall take title to and ownership of all materials and products developed by the Consultant pursuant to this agreement, including reports, drawings, schematics, computer files, designs developed, and other materials requested and provided as defined as deliverables under this RFP, except those covered by copyright. All materials and products produced shall be provided to the City upon expiry of this agreement without any payment by the City therefor.

9.11 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 Consultant, if the successful Consultant:

- .1 Fails to make delivery of the services;
- .2 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;
- .3 Fails to meet the City's standard of expected and agreed level of service and performance;
- .4 Be adjudged bankrupt or makes general assignment for the benefit of creditors.

Time is of the essence.

9.12 Cancellation

The Contract or Purchase Order issued may be cancelled by either party for any reason without cause or penalty upon 30 days written notice. Payment will be made to the Consultant for services and deliverables provided at time of notice.

The Consultant would immediately provide the City with all materials developed relating to the services and deliverables provided.

9.13 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:

1. 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. 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 within metro Vancouver area, British Columbia. Each party will bear its own costs of participating in the mediation.
3. 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. The place of litigation shall be within Metro Vancouver area, British Columbia.

9.14 Schedule of Payments

- .1 A City Purchase Order (“PO”) for the consulting services will be issued to the successful Proponent based on the proposal submitted and as finally negotiated. Invoice amount in excess of the PO will not be accepted. If projected costs exceed the original PO then a formal request to extend the PO amount must be provided in advance of additional work being undertaken and submitted as a written proposal for additional services and subsequently approved by the City’s Project Manager.

Invoicing

Consultant is required to forward to the City’s Project Manager a draft copy of the invoice for review five (5) business days **prior to** formal submission to the City.

Invoices must be prepared on a monthly basis and are to be sent in .pdf format sent to email: apinvoices@coquitlam.ca Attention: Accounts Payable, and must indicate the PO number, the project name and the City’s Project Manager. The City’s Project Manager is to be copied on the email distribution.

Payments

Payments will be made in portions of the fixed lump sum amounts quoted based upon satisfactory completion of a portion of each of the project deliverables as determined by the Project Manager outlined above and in accordance with the fee schedule. The Proponent shall submit a similar fee matrix in their proposal with the ‘Fee (lump sum)’ amounts completed that match the level of effort table.

.2 Summary Cost Status

All Fee (Lump Sum) invoices are to be accompanied by a cost status breakdown showing information regarding hours budgeted, hours spent to date, and projected total hours, all with associated costs. Invoices not containing the summary cost status will not be processed until the information is provided.

.3 Payment of Invoices

Payment for work covered by the Purchase Order will be made at the Fee (Lump Sum) rates for personnel and for approved disbursements as outlined in the RFP.

GST is to be shown as a separate item. Invoice amounts for disbursements which are not identified under the RFP, or not subsequently approved, will not be considered. If the work indicated on the summary cost status and invoice is approved by the Project Manager, payment is scheduled for 30 days after receipt of invoice.

Payments made to the Consultant shall not be construed as an unconditional acceptance of the work accomplished up to the time of payment.

.4 Withholding of Payments

- .1 The City may withhold payment to the Consultant as necessary to protect the City relating to unsatisfactory performance or quality of work;
- .2 No interest shall accrue on payments withheld by the City. Interest payments will only be considered where it is agreed that the City erred in its information causing the withholding of payment.
- .3 The withholding of any payment shall not affect the Consultant's obligation to continue performance of work.
- .4 No additional design costs will be paid to the Consultant or their sub-Consultants as a result of changes to the design schedule or order of work throughout the duration of the Contract (e.g. if the project must be phased).

.5 Extra Work

The Consultant must receive written approval from the City prior to commencing any additional works which will affect the project cost or schedule. A Change Order form must be submitted in the event the Consultant fees exceed the original proposed purchase order amount. In this situation the Consultant will be requested to submit scope of work change alternatives to meet the budget.

A separate schedule of values is required as supporting documentation to the invoice for all additional services.

Any invoice encompassing extra work or additional work not previously approved in writing will not be accepted by the City.



City of Coquitlam
REQUEST FOR PROPOSALS
RFP No. 17-03-10

**Housing Choices Review:
Urban Land Economic Analysis &
Architectural Testing**

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

Tuesday, September 26, 2017
(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 or fax 604-927-3035.

Proposal Submission Form

**Complete and return this section and include:
Appendix A – Schedule of Effort and Fees**

Submitted by: _____
(company name)

1. Identification of Project Team

1.1 The Consultant team should have demonstrated skills, knowledge and expertise in the following fields to complete this assignment:

- Municipal land use policy and zoning regulations;
- Infill housing planning and design;
- Architectural design and site planning; and
- Housing market and pro-forma analysis.

The Consultant(s) should have urban land economic analysis and architectural design as a core component of their business, and be able to provide leadership to and management of the Consultant team through experience, local knowledge, innovation in design and a philosophy that is compatible with the City's vision for the delivery of Parks, Recreation and Culture Services.

1.2 Identified on the Level of Effort/Fee Matrix (**Refer to Appendix A**) all Prime Consultant personnel directly assigned to the Project.

1.3 Identified on the Level of Effort/Fee Matrix (**Refer to Appendix A**) all Sub Consultant personnel directly assigned to the Project, including written acknowledgement from the Proponent of their ability to effectively manage and coordinate the work of their Sub Consultant Team.

1.4 The personnel assigned to this project, as outlined in the proposal submission, shall remain in-place for the duration of the contract, unless prior written notification has been provided by the Consultant and approval granted for the personnel change from the City's Project Manager including but not limited to:

- 1) Prime/Lead Consultant personnel;
- 2) Sub Consultant(s); and
- 3) Any other Consultants who will provide specialized services that the Proponent believes will add value to the project.

Include with your proposal submission a brief CV for each team member including sub-consultants limited to 2 pages maximum.

2. Methodology and Approach

- 2.1 The Proponent is responsible to determine the framework for the most efficient, effective and thorough work plan based upon their own proven performance and time tested practices. The City is looking for dynamic, creative solutions. Deviations from the work program must be rationalized.
- 2.2 Provide an itemized work program grouped by items of work (tasks) envisioned by the Proponent, with a description of each task in accordance with the Scope of Services. Activities in this section shall be carried forward into the Level of Effort/Fee Matrix referenced in Section 1.0 above.
- 2.3 Indicate those activities the City is expected to undertake in the description of the task along with the level of support that the Proponent would provide;
- 2.4 The Proponent shall be responsible for clearly identifying, in their fee schedule, any items which the Proponent deems as ‘extra work’ which they feel is integral to and necessary for the successful completion of this project and/or work for which they will not be responsible.

The Proponent shall list these ‘Optional Services’ including the cost and any associated disbursements if they were tasked to complete this ‘extra work’.

- 2.5 Describe the methods to be employed to perform and coordinate the services and to control the scope, quality, schedule and cost of the project.

3. Work Plan Schedule

- 3.1 Written acknowledgement of the Proponent’s availability to meet the time schedule and completion date and ability to deliver the required Services to the City given the proponent’s existing workload and future commitments.

4. Project Understanding and Value Added Benefits

- 4.1 The Proponent is responsible for demonstrating a comprehensive understanding of the project objectives, outcomes, and vision, including any major issues and opportunities presented by the project.
- 4.2 The Proponent is to provide any other details that demonstrate additional benefits or value added services that would be provided to the City. This could include a description of the Proponent’s competitive advantage and unique positioning in the market.

5. Level of Effort

- 5.1 A completed Schedule of Effort and Fees showing an appropriate level of hours/effort for each of the project components, broken down by consultant team member assigned to each component. Format to match **Schedule of Effort and Fees - Appendix A.**

6. Fee Schedule and Cost of Services

6.1 Price – Lump Sum Fees – Design/Consulting Services

- 1) Provide a detailed fee schedule noted above. The fee schedule shall show the maximum upset limits that the ‘Consulting Team’ will not exceed unless the City Project Manager requests additional services which are beyond the Scope of Work as outlined in this RFP.
- 2) Include any additional “Optional Services” or costs not accounted for in the fee schedule as part of the proposal submission.
- 3) The successful Proponent will not be able to claim any additional cost as a result of changes to the schedule or order of works or for project delays. This condition shall be in effect for the duration of the project.

Appendix A - SAMPLE SCHEDULE OF EFFORT AND FEES

Company Name: _____

ITEM NO.	COMPONENT	Indicate Assigned Staff, Number of Hours, and Rate/Hour			TOTAL FEE (LUMP SUM) (exclude GST)
Part 1	Background Research & Preliminary Memo				
1.0	'Kick off' & subsequent meetings with staff (4 meetings total)				\$
2.0	Background Research & Analysis				\$
3.0	Preliminary Memo Development				\$
4.0	Preliminary Memo				\$
5.0	Disbursements				\$
	Sub-total				\$
Part 2	Draft Report				
6.0	Draft Report Development				\$
7.0	Draft Report				\$
8.0	Disbursements				\$
	Sub-total				\$
Part 3	Final Report				
9.0	Final Report Development				\$
10.0	Final Report				\$
11.0	Disbursements				\$
	Sub-total				\$
	Total Lump Sum Fee (exclude GST)				\$

7. Recent Experience and References

Contacts referenced should identify recent projects similar in size, scope and complexity.

By submitting a proposal, Proponents authorize the City to verify information provided and success on these projects. The City will not discuss reference information provided from these companies with any proponents.

Year Started	
Year Completed	
Description of Contract	
Company	
Contact Person	
Telephone and Email	
Contract Value	
Proponent Team Members Involved on this Project	

Year Started	
Year Completed	
Description of Contract	
Company	
Contact Person	
Telephone and Email	
Contract Value	
Proponent Team Members Involved on this Project	

Year Started	
Year Completed	
Description of Contract	
Company	
Contact Person	
Telephone and Email	
Contract Value	
Proponent Team Members Involved on this Project	

8. Conflict of Interest Declaration

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

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9. Period for Acceptance of Proposal

The City of Coquitlam requests Proposals to remain open for acceptance for a minimum of 60 days.

Our Proposal will remain open for acceptance by the City for a period of _____ days from the Closing Date.

10. 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

11. 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 <i>for communication related to this RFP</i> (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.