

City of Coquitlam

Request for Information and Qualifications

RFIQ No. 17-11-04

Facility Asset Management Consulting Services

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DEFINITIONS

In this RFIQ the following terms will have the meaning set out below:

“City” means the City of Coquitlam.

“Contract” means a City Purchase Order issued to a Consulting firm selected to undertake the Services.

“Consultant(s)” mean those firms that the City has selected to provide professional and technical consulting services relating to planning & design of projects and/or project categories identified in this RFIQ.

“Preferred Proponent” means a proponent selected by the Evaluation Committee to participate in a subsequent RFP process or enter into negotiations for a Contract.

“Proponent” means an entity that submits a subsequent proposal.

“Respondent” means an entity that submits a response to this RFIQ.

“RFIQ” means this Request for Information and Qualifications.

“Services” means and includes anything and everything required to be done by the Professional Consultant for the fulfillment and completion of the Contract as described in this RFIQ.

“Submission” means a response submitted for evaluation in response to this RFIQ.

1.0 REQUEST FOR INFORMATION AND QUALIFICATIONS

1.1 Introduction

The City of Coquitlam is issuing this Request for Information and Qualifications to select professional qualified experienced consulting firms to provide Consulting Services for **Facility Asset Management**.

This RFIQ is intended to invite qualified Consultants who are interested in, and who have the expertise, experience, resources and knowledge to perform the Services for a variety of consulting assignments.

The City is seeking dynamic and creative engineering teams with specialization in one or more of the categories outlined below.

The selection process will generally conform to the InfraGuide® - [Infraguide Selecting a Professional Consultant](#)

1.2 Obtaining RFIQ Documents

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

Printing of RFIQ documents is the sole responsibility of the Respondents.

1.3 Purpose

The City intends to create a short list of professional consulting firms for each category for a term of three or more years or until the City releases a new RFIQ.

To be considered for the Services, respondents shall have specialization in one or more of the following categories:

- **Category 1 – Facilities Risk-based Lifecycle Planning**– facilitate the development of a 5-20 year risk-based lifecycle plan for City of Coquitlam facilities and their various sub-components and systems.
- **Category 2 - Facilities Functional and Demand Condition Assessment** – Develop a best practice methodology for determining functional and demand condition of City of Coquitlam facilities

- **Category 3 - Strategic Facilities Asset Management (AM) Plan** – Facilitate the development and completion of a 20+ year Facilities Asset Management Plan.
- **Category 4 - Facilities Energy Management Plan** – Facilitate the development and completion of a strategic and tactical energy management plan for the City’s facilities.
- **Category 5 - Facilities Technology and Information Management Plan.** Facilitate the development and completion of a strategic technology and information management strategy and plan.

1.4 Category Descriptions

The Category Descriptions are further described in **Appendix A**.

1.5 Eligibility

For eligibility, as a condition of award, the successful company would be required to meet or provide the equivalent:

- .1 Professional and Commercial General Liability (CGL) insurance coverage as outlined on the City’s [Certificate of Insurance - Consultant Form](#)
- .2 Be a registered member of an association with a professional discipline relating directly to the *Service* being provided, for example, the Association of Consulting Engineering Companies (ACEC).
- .3 Accept the City’s standard Terms and Conditions posted on the City’s website: [Terms and Conditions of Purchase](#)
- .4 May be required to obtain a City of Coquitlam or Tri Cities Intermunicipal Business License:
<http://www.coquitlam.ca/city-services/licenses-and-permits/business.aspx>

These items are not required as part of this RFIQ Submission but will be required prior to entering into an agreement with the City for Services.

2.0 INSTRUCTIONS TO RESPONDENTS

2.1 RFIQ Schedule

The following are the estimated schedule dates for the stages of this RFIQ:

RFIQ Closing	Wednesday, December 13, 2017 2:00 pm (local time)
Evaluation	December 2017
Selection	January 2018

The proposed schedule is an estimated timeline and may change at the discretion of the City.

2.2 Closing Date and Time

Submissions should be received on or before 2:00 pm local time,
Wednesday, December 13, 2017

2.3 Instructions for Submission

Submissions are to be consolidated into one PDF file and uploaded electronically through QFile, the City's file transfer service accessed at qfile.coquitlam.ca/bid

- 1. In the "Subject Field" enter:** RFIQ 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 receipt.)

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

The City at their sole discretion reserves the right to accept Submissions that are received after the Closing date and time but is under no obligation to do so.

Submissions will not be opened in public.

Submissions may be withdrawn upon request by an authorized representative of the Respondent sent to email: bid@coquitlam.ca prior to time set as closing time for receiving Submissions.

Respondents are required to allow ample time for completion of the Submission process.

Should assistance be required Ph: 604-927-3060 or Fax: 604-927-3035.

2.4 Enquiries

All enquiries regarding this RFIQ should be submitted in writing 3 business days prior to the Closing date and sent to email: bid@coquitlam.ca

The City shall determine, at its sole discretion, whether the query requires response, and such responses will be made available to all Respondents by issue of Addenda posted on the City's website that will be incorporated into and become part of the RFIQ.

No oral conversation will affect or modify the terms of this RFIQ or may be relied upon by a Respondent.

2.5 Addenda

Respondents 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

If the City determines that an amendment is required to this RFIQ, the City will issue a written addendum that will be incorporated into and become part of the RFIQ. Respondents should acknowledge receipt of addenda in their Submission.

Upon submitting a response to this RFIQ, Respondents are deemed to have received all Addenda posted on the City website and deemed to have considered the information for inclusion in their Submission.

Should there be any discrepancy in the RFIQ documentation provided, the City's original file copy shall prevail.

2.6 Freedom of Information and Protection of Privacy Act

Information received by the City will be held in confidence and will become the property of the City. The City is, however, bound by the provisions of the Freedom of Information and Protection of Privacy Act, and all parties are advised that Submissions will be treated as public documents and their contents may be disclosed, pursuant to the Act.

Respondents agree that by submitting a response to this RFIQ, the City may disclose the name of their company(s).

2.7 Acceptance of Submissions

The City reserves the right to reject any or all Submissions or to accept any Submission received in response to this RFIQ, should the City judge it be in the best interests of the City to do so. The City reserves the right to waive any irregularities in any Submission. The City is under no obligation to select Preferred Proponent(s), or to proceed to negotiations for a Contract, or to award any Contract, and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFIQ process. If the City decides to terminate this RFIQ process, it may at any time invite further Submissions for the provision of the *Services* or enter into any discussion or negotiations with any party for the provision of the *Services*.

The City shall not be obligated in any manner to any Respondent whatsoever until a written agreement has been duly executed relating to an accepted Proposal.

2.8 Respondent's Expenses

Respondents are solely responsible for their own expenses in preparing Submissions, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to, or arising from this RFIQ.

2.9 No Claim

The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent as a result of or related to the RFIQ, the preparation of a Submission, the evaluation of Submissions, the acceptance or rejection of any compliant or non-compliant Submission, breach of any obligations arising under the RFIQ, negotiations for a Contract or the cancellation, suspension or

termination of the RFIQ, and by submitting a response to this RFIQ, each Respondent will be conclusively deemed to waive and release the City and its employees, contractors, consultants and agents, from and against any and all such claims.

By submitting a response to this RFIQ, each Respondent shall be deemed to have agreed that it has no claim.

2.10 Conflict of Interest

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

2.11 Solicitation of Council Members and Staff

Respondents will not contact any member of the City Council or staff with respect to this RFIQ at any time prior to the award of a contract or the termination of this RFIQ other than as permitted as an enquiry identified in this RFIQ. The City may reject the Submission of any Respondent that makes any such contact.

2.12 Not a Tender or Request for Proposals

This RFIQ is not a tender process nor is it an Invitation to Tender or Request for Proposals and is not intended to create a contractual relationship between the City and the Respondent. By issue of this RFIQ document, the City intends to reserve itself to absolute and unfettered discretion to invite, consider and analyze Submissions, select Preferred Proponent(s) and negotiate with or issue a Request for Proposals to the Preferred Proponent(s) or cancel this RFIQ process as the City considers desirable.

2.13 No Obligation

The City reserves the right to accept or reject any or all Submissions or cancel this RFIQ at any time.

3.0 RFIQ EVALUATION CRITERIA

Each Respondent shall only provide the City with one submission, which should indicate all the categories being applied for. The strength the submission will be evaluated separately for each applicable category. For example, a Respondent may be rated high for one category and low for a separate category. The evaluation criteria are as follows:

- 1. Experience and Qualification of the Project Team - 25 points**
 - Qualification of the core project team that would be responsible for the projects.
 - Qualifications of the team lead who will assume responsibility for managing project deliverables and serve as the main point of contact to The City.
 - Strength of listed sub-consultants
- 2. Proposed Methodology - 25 points**
 - Proposed methodology and tools that will be used to fulfill project requirements
 - Examples cited where such methodology has been used to success.
 - Incorporation of environmental, social and economic principles in decision making
 - Proposed quality control and assurance process
- 3. Record of Relevant projects - 40**
 - Demonstrated success with similar relevant municipal or corporate projects for each of the categories listed
 - References – success on previous, relevant projects. This should include past performance working on City of Coquitlam projects, where applicable
 - Demonstrated ability to complete assignments on time and within budget
- 4. Value Added Services - 10 Points**
 - Social, economic, and environmental initiatives that would provide benefit to the community
 - Use of innovative technology, management systems and approaches that have provided added value
 - Value added Benefits

The Submission Form and the resumes provide Respondents with the opportunity to demonstrate their strength in the above criteria, for each category.

Upon submitting a response to this RFIQ, Respondents consent to the City and their representatives checking and verifying the information provided. References may be contacted. Reference checks will be kept confidential and will not be reviewed or discussed with companies applying for the pre-qualification.

4.0 SELECTION PROCESS

The evaluation team will review the Submissions and rank them based on the evaluation criteria outlined above. The City reserves the right to consider other criteria that may become evident during the evaluation process to obtain best value.

The City may, at its discretion, interview one or more Respondents, or request clarifications or additional information from a Respondent with respect to any Submission.

Based on the evaluation results, the City will create a short list of highest ranked Consultants for each of the listed categories.

The selection process will generally conform to the [InfraGuide® - Selecting a Professional Consultant](#).

The City makes no representation of any kind as to the volume of projects and reserves the right to implement a separate pre-qualification process where more specialized services or projects are involved.

The evaluation will be confidential and no totals or scores will be released to any of the Respondents.

5.0 SHORTLIST FOR FUTURE PROJECTS

The City intends to create a short list of professional consulting firms from which it will then select one or more Consultant(s) to provide the *Services* for a period of three (3) years or until such a time as the City releases a new RFIQ.

The City may then negotiate directly with the highest ranked Consultant(s) or request proposals from one or more of the selected Consultants for technical services for any of the assignments.

The pre-qualified Consultants will be kept on file for a period of three or more years and the City may request proposals from those companies at any time.

The City will monitor and evaluate the performance of the Consultants and may adjust the ranking based on the performance of the Consultant during the completion of an assignment.

In the event that that the shortlisted companies in a category have either:

1. not performed well, and as a result have been removed from the shortlist, or
2. do not have resources available that are suited to an assignment,

The City reserves the right to solicit a proposal from the next highest ranked Respondent that is qualified to perform the assignment and modify the short list.

At any time; the City may issue a bid process, at their discretion, to select Consultants for any project including those deemed to require other specialized skills, knowledge or experience.

The City makes no representation of any kind as to whether it will invite proposals for or carry out future projects, or as to the volume of projects that would be available to any Consultant.

6.0 REQUEST FOR DEBRIEF

Upon request, unsuccessful companies may request a debrief with City staff regarding their submission sent to email: bid@coquitlam.ca

The City will not provide information regarding other company's submissions.

APPENDIX A - CATEGORY DESCRIPTIONS

Categories– Professional consulting services for:

- 1. Category 1 – Risk-based Life-cycle Lifecycle Planning**– Facilitate the development of a 5-20 year risk-based lifecycle plan for City of Coquitlam facilities and their various sub-components and systems. Work with a cross-departmental team to ensure the plan considers the City’s available facility asset condition data and lifecycle projection while integrating with other relevant asset lifecycle and replacement considerations and plans (e.g., parks assets).
- 2. Category 2 - Facilities Functional and Demand Condition Assessment** – Develop a best practice methodology for determining functional and demand condition of City of Coquitlam facilities. Validate the viability of this methodology by implementing pilot projects to ensure that broad implementation is practical, cost-effective and provides meaningful results and outcomes. The methodology may be adjusted to align with different types of facilities (e.g., recreations centers, waterparks, operational works yards, civic administration buildings, arts & cultural buildings, etc.)
- 3. Category 3 - Strategic Facilities Asset Management (AM) Plan** – Facilitate the development and completion of a 20+ year Facilities Asset Management Plan that incorporates the following key elements:
 - Gap analysis of City of Coquitlam’s Facilities AM program and practices
 - Facility Asset’s strategic vision, mission, goals and objectives
 - Facilities AM Policy
 - Asset and Business Risks
 - Level of Service Framework including the determination of current and future service levels
 - Risk Management Framework
 - Integrated Capital Plan (Renewal, Replacement and New Assets)
 - Operations and Maintenance Plans
 - Financial Summary
 - AM Performance Measures & Targets
 - Facility Asset Management System
 - Prioritized list of Continuous Improvement Projects
 - Roadmap of plan implementation and resourcing
 - Budget Implication
 - Monitoring and Communication Plan
 - Assessment of high-level risks to plan

- 4. Category 4 - Facilities Energy Management Plan** – Facilitate the development and completion of a strategic framework (e.g., SMART buildings) as well as a tactical energy management roadmap and plan specific to the contribution of The City’s facilities in achieving the corporate target of reducing GHG emissions 40% below 2007 level by 2025.

- 5. Category 5 - Facilities Technology and Information Management Plan** – Facilitate the development and completion of a strategic and tactical technology and information management plan. This includes developing the framework and implementation roadmap for AM-related information systems (e.g., CMMS, IWMS, BMS, Space Planning, Lifecycle Planning, etc.) and the use of other emerging technologies (e.g., Internet of Things, etc.) to improve the efficiency and effectiveness of facilities management.



City of Coquitlam
REQUEST FOR INFORMATION AND QUALIFICATIONS
RFIQ No. 17-11-04

Facility Asset Management Consulting Services

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Wednesday, December 13, 2017
("Closing date and time")

INSTRUCTIONS FOR SUBMISSION

Submissions are to be consolidated into one 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:** RFIQ 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.)

Respondents are responsible to allow ample time to complete the Submission process. If assistance is required, phone 604-927-3060.

SUBMISSION FORM

Complete and return this section and attach Resumes

Submitted By: _____
(Company Name)

Each Respondent is to provide only one (1) submission indicating all the categories being applied for. Respondents may also choose to be listed as sub-consultant in another Respondent’s submission.

Please submit information organized and numbered in the following manner according to this template.

1. Categories of Work – Table 1

Please indicate below in Table 1 the categories which your firm is applying for shortlist consideration.

	Category	Applying for Shortlist?	
		Yes	No
1	Risk-based Facilities Lifecycle Plan		
2	Facilities Functional and Demand Condition Assessment		
3	Strategic Facilities Asset Management Plan		
4	Facilities Energy Management Plan		
5	Facilities Technology and Information Management Pan		

2. Key Personnel

List your firm’s principal(s), managers, and key personnel who would be working on the assignments. (Add rows as needed). Attach personnel Resumes - maximum of 1 page per resume.

Resumes should indicate the category(s) that the staff person has expertise in.

Provide an organization chart of the core project team that would be responsible for the projects, including roles and responsibilities for each team member.

Identify the team lead who will assume responsibility for managing project deliverables and serve as the main point of contact to The City. Provide at least two references for the team lead. Include the project name, project description and contact information for references provided

The personal information obtained from resumes is collected in accordance with the *Freedom of Information and Protection of Privacy Act* for the purpose of evaluating experience. Proponents may flag this information as “Confidential”.

2. Key Personnel (cont'd)

Should you have any questions or concerns about the collection and/or release of your personal information, please contact the Purchasing Manager by email sent to: bid@coquitlam.ca or Phone: 604-927-3034.

Name	Title/Position	Years with Firm	Category(s) of Experience (Refer to Table 1)

3. List of Sub-Consultants

Sub-consultant	Category	Brief reason as to why the sub-consultant is on your team.

4. Examples of Successful Projects

(Provide 2 examples per category/sub-category of recent relevant municipal projects being applied for)
 (Local examples are preferred)

CATEGORY (Refer to Appendix A)	
PROJECT 1	
Project Title	
Project Budget	
Client Company Name	
Consulting Services Contract Value	
Year of Completion	
Brief Description of Project including methodology	
Description of quality control and assurance process used	
Key Personnel Involved on Project	
Initial Schedule (Duration or Project)	
Actual Schedule of Consultant Services	
Describe why you believe the project was successful?	
Contact Person	
Telephone and Email	

4. Examples of Successful Projects (cont'd)

(Provide 2 examples per category/sub-category of relevant work being applied for)
 (Local examples are preferred)

CATEGORY (Refer to Appendix A)	
PROJECT 2	
Project Title	
Project Budget	
Client Company Name	
Consulting Services Contract Value	
Year of Completion	
Brief Description of Project including methodology	
Description of quality control and assurance process used	
Key Personnel Involved on Project	
Initial Schedule (Duration or Project)	
Actual Schedule of Consultant Services	
Describe why you believe the project was successful?	
Contact Person	
Telephone and Email	

5. Demonstrated ability to complete assignments on time and within budget

1.	Briefly describe how your company will complete assignments on time and within budget?
2.	<p>In the past 5 years, has your firm been late in delivering an assignment to the City, or for a client listed in Section 3?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, for what categories?</p>
3.	What were the reasons for the delay?
4.	Did your firm make attempts to mitigate the issue?
5.	<p>In the past 5 years, has your firm been over budget in delivering an assignment to the City, or a client listed in section 3?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If yes, for what category of work?</p>
6.	What were the reasons for being over budget?
7.	Did your firm attempt to mitigate the issue?

6. Sustainable Benefits

Briefly describe your firm’s social, economic and environmental initiatives, innovations, and practices and how those would benefit the City in providing the services that provide benefit to the City.

7. Value Added Benefits

What other information is not requested here but which you think the City should consider in evaluating your firm?

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

8. Conflict of Interest Declaration

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

9. Addenda

We acknowledge receipt of the following Addenda related to this RFIQ and have incorporated the information received in preparing this submission:

Addendum No.	Date Issued

10. Resumes

ATTACH – PERSONNEL RESUMES

Maximum 1 page each, include categories (or sub-categories) of expertise.

11. Authorization

Company Name:	
Address:	
Phone:	
GST Registration No.:	
Project Contact: Name and Title of Individual <i>for communication related to this RFIQ</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 RFIQ, electronic signatures will be accepted.