

City of Coquitlam

Request for Proposals
RFP No. 18-02-06

Project Management Services

Issue Date: April 18, 2018

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APPENDIX A – CONTRACT

[PROPOSAL SUBMISSION FORM](#)

SUMMARY OF KEY INFORMATION

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| RFP Reference | RFP No. 18-02-06 Project Management Services |
| Overview of the Opportunity | The purpose of this RFP is to invite proposals from qualified Project Management Firms to provide miscellaneous Project Management Services on “an as and when requested basis” for the City of Coquitlam. |
| Questions | Questions are to be submitted in writing quoting the RFP number and name sent to email: bid@coquitlam.ca |
| Addenda | Proponents are required to check the City’s website for any updated information and addenda issued at: www.coquitlam.ca/BidOpportunities |
| Closing Date and Time | 2:00 pm local time Wednesday, May 9, 2018 |
| Instructions for Proposal Submission | Proposals 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 <ol style="list-style-type: none"> 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 receipt.) Phone 604-937-3060 should assistance be required. |

DEFINITIONS

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

“City” means City of Coquiltam.

“Consultant” means the successful Proponent that enters into Contract to carry out all the duties, obligations, work and services outlined in this RFP.

“Price” means the amount that will be paid by the City to the Consultant for delivery and acceptance of goods.

“Proponent” means responder to this Request for Proposals.

“Proposal” means the submission by the Proponent.

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

“Shall” “Must” “Will” “Mandatory” means a requirement that must be met.

1.0 INSTRUCTIONS TO PROPONENTS

1.1 Request for Proposals

The City of Coquitlam (“City”) requests proposals from professional qualified companies to provide Project Management Services for various capital projects on an “as needed and when requested basis”.

1.2 Obtaining RFP Documents

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

1.3 Term

It is anticipated that the short-listed qualified companies may be engaged to undertake project management services for the City at various times beginning approximately May 9018 for a three (3) year term. The term may be extended based on mutual agreement and confirmation of acceptable personnel, services and fees.

The City intends to create a short list of Consultants to provide Services for a period of three (3) years or until such a time as the City releases a new RFIQ. The City may request project specific proposals from one or more of these pre-qualified companies at any time during this period.

The City also reserves the right to separately issue new RFP’s for similar services to the open market for specific projects as well as add new companies onto the pre-qualified list on an on-going basis as deemed appropriate by the City in its sole discretion.

1.4 Background

The City invites proposals from qualified companies to provide miscellaneous Project Management Services on “an as and when requested basis” for small to medium scale capital projects approximately valued between \$50,000. - \$2M per project.

To be considered for inclusion on the Project Management list, proponents shall evidence the firm’s qualifications, experience and competence in performing the scope of work and proposed rates to be charged. It is anticipated that a shortlist will be compiled with a maximum of five (5) firms to be placed in the Project Management Program. Shortlisted Consultants may be required to complete a Professional Services Agreement (PSA).

The successful proponent(s) (“Consultant”) is required to designate a lead Account Manager (Project Manager) to facilitate all regular communications with the City throughout the contract period. This individual is not expected to be the primary project

manager, but rather to allocate appropriate resources and supervise individual project resources assigned to projects by the proponent.

The Consultant will primarily support the Strategic Initiatives Department, Strategic Projects Division. The Division is responsible for the complete range of design and construction of City parks and facilities. They are responsible for approximately 10 capital projects each year. The scope, complexity, technical knowledge and product expertise required across these projects vary from project to project. The Consultant may also support initiatives from other Divisions (e.g. Parks, Recreation, Engineering and Public Works) as and when needed. These projects will also vary in scope, complexity and therefore require a breadth and depth of technical knowledge and product expertise.

1.5 Consultant Selection

Consultants will be placed on a pre-qualified list. The selection of any Consultant will be based on the desired project team resources and individual project proposals. The City reserves the right to select any prequalified Consultant if in the City's sole opinion that Consultant has the preferred skills and resourcing that are required for the specific project.

The City also reserves the right in its sole discretion to approach one or more of the pre-qualified consultants on a project-by-project basis to obtain project specific proposals.

- 1) If a Consultant is requested to provide a project specific proposal after being short-listed as a qualified consultant, they shall provide the City with the following:
 - Name(s) and qualifications of staff assigned to the project and any sub-Consultants who will be used on the project.
 - An outline of the methodology proposed to undertake the project, including an outline of key factors to be considered.
 - Person-hour estimates for each of the work activities, including preliminary indications of which staff person and sub-Consultants, if required, will undertake the major portion of each activity.
 - A schedule of the key work activities and deliverables.
 - Fee amount including disbursements, and clarifying any additional costs less taxes.
- 2) Following submission of the project specific proposal the City reserves the right to negotiate any or all terms of the proposal as submitted by the Consultant. If no agreement can be reached, the City may choose to cancel the project or seek a proposal from another firm.
- 3) The City reserves the right to issue a new RFP for similar services for any project.
- 4) The City reserves the right to terminate the pre-qualification shortlist or issue a new RFIQ.
- 5) The City reserves the right to add new companies to the pre-qualified shortlist on an on-going basis.

1.6 Performance Standards

To ensure that the City receives the highest quality performance standards for the consulting services, the following procedures will be used in order to monitor each contract.

At the conclusion of all contracts, City staff will review the performance of the consultant in order to establish a consultant performance rating. This may include a debriefing meeting with the consultant.

In the event that that the shortlisted companies have not performed well in accordance with the expectations of assigned project, the company may be removed from the shortlist.

The City reserves the right to solicit proposal(s) from additional proponents to supplement the pre-qualification shortlist as required.

1.7 Maintenance of the Consultant List

The pricing provided should be guaranteed for one full year. Pricing should be provided for subsequent years but may be re-negotiated for subsequent annual terms. Any price increases are generally to conform with industry rates and to ensure fair market value in spending public funds.

During an annual review held each year, the City may add or delete resource types. Consultants may be asked to update their Proposals and provide updated pricing for each resource offered.

The City reserves the right to issue a bid process, at its discretion, to select Consultants for any project including those deemed to require other specialized skills, knowledge or experience.

Addition of resources (including Proponents who did not respond by initial closing date) may be accepted on an ongoing basis.

1.8 Scope of Services

The successful Proponent (“Consultant”) will provide management of various projects and/or provide additional project management support services on as and when required basis.

Tasks that may be required on some or all of these projects include but are not limited to:

Creation of scope for the purpose of consultant scope definition, construction tendering or obtaining pricing.

Tasks that may form part of this work include coordinating the involvement of the City’s contract architects, designers and engineers to:

- a) Ensure proper solutions are provided,
- b) Research options for solutions,
- c) Review of logistics issues that will impact execution of the project, and
- d) Assembling all documentation covering scope.

Providing the required specifications and documentation for the preparation (by the Purchasing Department) of solicitation documents, overseeing the management of the tender process and evaluation of proposals and may include:

- a) Working with the City’s Purchasing staff,
- b) Managing addendum and questions that arise during the solicitation process,
- c) Obtaining required number of quotes on lower priced items that do not require full public solicitations,
- d) Evaluation of submissions,
- e) Coordinating review of options and choices when required. This may include engagement of facilities staff, staff from multiple divisions, public consultation and reports/presentations to Coquitlam Council, and
- f) Work with staff on selection of successful proponent.

Ensuring compliance with all applicable legislation and regulations throughout the project(s). Some examples include:

- a) Purchasing policies,
- b) Environmental policies,
- c) Hazardous materials issues,
- d) Building code,
- e) Provincial safety authority,
- f) Fire safety issues; and
- g) Occupational Health & Safety.

Management of the provision of the services with the view to consider:

- a) Safety,
- b) Logistics,
- c) Compliance with scope,
- d) Changes in contract scope; change orders as required,
- e) Quality control,
- f) Sign off on progress claims and substantial completion,
- g) Deficiency corrections; and
- h) Budget tracking.

All work will be done working in coordination and under the leadership of a City of Coquitlam Manager (e.g. General Manager, Director, Project Manager, Construction Manager) or designate.

It is expected that the successful project management firm will:

- a) Have sufficient resources to be able to take on several projects at once if necessary.
- b) Manage all design professionals brought in as consultants during the preparation of the project scope. This may include engineers, architects or other professionals.
- c) Work with the City to coordinate all logistics. In almost all cases the facilities will be in use by both public and staff during the execution of the work, in some cases up to 24 hours a day seven days a week. Mitigating impact on operations is a key factor in planning and scheduling all work.
- d) The Consultant will mitigate risk and critical impacts where there are minor or major deviations in scope, schedule and budget.

The Consultants shall also provide expertise in the following:

- a) Renovation projects on sites of on-going operations, temporary staff accommodation planning and management, move management and construction site safety access considerations for staff;
- b) Renovation or renewal projects undertaken in sites with on-going high public traffic and use concurrent to construction, construction site safety and access considerations for public;
- c) Working with design consultants, architects and engineers;
- d) Proven cost control skills;
- e) Building public institution projects;
- f) Managing sub-consultants and sub-trades – with respect to time and budget;
- g) Provide construction administration processes including but not limited to creation of meeting minutes, documenting, reviewing and approving contract contemplated change orders, change orders, change directives and site instructions
- h) Tight timelines, ability to anticipate issues;
- i) Solving site issues
- j) Coordinating multiple sub-trades;
- k) Public sector tendering.

Term of Projects

The typical contract is expected to run approximately two to six months. Work will be as and when requested with no guarantee of the number hours or the volume of projects.

Fees

The successful proponent(s) will be expected to provide the City with a price quote in advance of the commencement of each individual project. Quotes will outline hours and rate(s).

After this quote has been submitted the City may:

- a) Agree to proceed with the quote.
- b) Negotiate the scope of services and price.
- c) Request a quote from one of the other short-listed qualified project management firms and may award the work to them.
- d) Choose not to proceed with the project management services and will manage the project themselves.
- e) Agree to proceed on the project with the project management services but then chose to delay or even cancel a project prior to completion. Project management fees would be adjusted to reflect only work completed.
- f) Procure services for the project on a stand-alone basis by issue a new RFP specific to the project.

2.0 PROJECT MANAGEMENT SERVICES

2.1 General Requirements

The Project Manager and/or resource as warranted by the project assignment shall:

- Coordinate, monitor and manage the progress of work and activities of the Consultant team and Consultants as required with the intent to complete the project work within the written and approved scope, schedule and budget.
- Provide procedures and protocols for all project related communication to the Client, Consultant team and Consultants. Meetings as requested by the City as well as meetings not directly requiring City input or participation shall be scheduled to maximize benefit of participation as well as to enable strategic discussion, problem solving and decision making. PM shall chair and minute all meetings.
- Provide regular updates to the City through written reports indicating progress and status of agreed scope, schedule and budget. Such reporting will rely on PM developed effective procedures of financial controls, approvals and progress measured against schedules. Where scope, schedule and budgets have identified potential or realized deviations, the PM shall seek to advise the City, Consultant and Consultant as urgently as is reasonable with an intent to seek solutions and agreement/ approval where required.
- Manage all financial aspects with particular attention to being prime qualified receiver of invoices; to receive, review and recommend to The City staff for payment. Invoices shall be recommended within ten days of receipt.
- Travel to site(s) as required.
- Coordinate with City of Coquitlam Manager;
 - Management of The City contracts
 - Agreement of form of monthly status reports
 - Agreement of invoice payment procedures
 - All external media and communications inquiries
 - Communications with City staff/ stakeholders

STAGE 1: PRE-DESIGN AND CONCEPTUAL DESIGN

- Establish the methods, procedures, quality control standards and lines of communication required to control the Project including Project budgets to assure the successful design and construction of “Project Name” within the defined time and cost constraint and to the established quality standards. Established methods, procedures and standards shall comply with The City’s overall policies and procedures.
- Manage and oversee the procurement process for the design team working in conjunction with the City’s procurement department.
- Manage the integrated design consultant team and oversee their contract administration duties.
- Manage all consultants retained by the City to perform certain consultancy services for the Project
- Provide monthly progression status reports to the management committee

- Review all of the information and data that are available and coordinate with the City's different departments, design team, and user groups to ensure the delivery of a fully coordinated design.
- Prepare Risk Management Plan identifying and analyzing existing and potential risks that may arise in the life of the Project and mitigation measures and methods to eliminate or minimize those risks and reduce their impacts as applicable.
- Work with the City, user groups and design consultant team to establish and formalize the design basis for the Project,
- Provide design inputs as deemed to be necessary and as applicable with respect to constructability, O&M, and life-cycle costs considerations.
- Work closely with the management committee, user groups and design consultant team to define the Scope of Work and objectives for the Project,
- Prepare a Project Implementation Plan outlining Project objectives, quality control and quality assurance procedures, cost, schedule, deliverables and sustainability criteria, procurement strategies, and all the information needed for the successful project delivery
- Review and coordinate the implementation of the appropriate and cost efficient sustainable design strategies with the City and design consultant team.
- Meet with the design consultants and representatives of the user groups, at the direction of the City and as required, to review and to coordinate the updating of the functional program for the facility.
- Provide liaison and coordination with authorities having jurisdiction including but not limited to the City.
- Coordinate and prepare, in conjunction with cost consultants, a preliminary Project budget. Initiate cost control measures. Review and monitor production of preliminary design drawings; coordinate the submission of applications for required permits, and the formal design review processes.
- Coordinate and liaise with the design consultant team regarding sustainable building measures and advise the City whether the measures proposed are cost effective and improve the efficient operation of the building.
- Establish in conjunction with the members of the Project team, a detailed master schedule, including key dates, to ensure strict control of all subsequent project activities. The schedule will incorporate all related and dependent activities such as:
 - Design and approvals
 - Permits submission
 - Procurement and delivery of materials and equipment
 - Procurement of construction packages
 - Review level of commissioning appropriate to project and need for commissioning agent involvement at earliest stage, discuss options with management committee, and procure commissioning agent at appropriate time.
- Coordinate with Public Arts group and design consultants to incorporate artwork design into the overall project design and provide input as required.

STAGE 2: PRE-CONSTRUCTION – DESIGN DEVELOPMENT, CONTRACT DOCUMENTATION, AND SOLICITATION PROCESS

- Direct, supervise and administer contracts between the City and the design consultant team.
- Review and monitor the production of the schematic design and design development drawings and construction documents as the design consultants develop them and provide feedback as required to and from the City. Formal submissions and drawing reviews shall take place at completion of schematic design, design development, 50% construction documents and 95% construction documents.
- Develop a detailed budget in conjunction with the City's cost consultant and design consultants. Work closely with the City's Manager to update the Project's budget on monthly basis and as required.
- Provide regular review and monitoring of the Project work, coordinate regular City, design team meetings and attend Council meetings when requested.
- Incorporate environmental and sustainability criteria as required.
- Provide progress reports to the Manager on monthly basis and as required indicating the status of the Project with respect to budget, schedule, variances and potential issues of concern and recommendations.
- Assist the City in the review of the construction contract documents and coordinate with the City's Purchasing Department and design consultant team the preparation of contract solicitation document packages.
- Assist user groups in preparing furniture, fixtures and equipment (FF&E) lists, establish FF&E budgets and coordinate the procurement and installation of FF&E.
- Coordinate with the design consultant team the preparation of applications and submissions for required permits and licenses.
- Participate in the public consultation process as and when required.
- Assist the City in the administration of the request for proposals (RFP) process for the selection of a base building design-builder and TI Consultant if required.
- Coordinate with the Design team and Purchasing Department the responses to bidders' Request for Information (RFIs) and Addendum issuance
- Coordinate with the design team to review and analyze bids and prepare bids evaluation report and recommendation to award
- Assist Purchasing Department in the preparation of the Letter of Intent (LOI) and construction contract or development agreement
- Upon construction contract award coordinate with the design consultant team the issuance of the updated contract documents package including all solicitation responses and Addendum that were issued during tendering time and Issued for Construction Drawings (IFC).
- Coordinate with and monitor the performance of the Consultant, hired by the City, to ensure the timely and effective completion of the following duties:
 - Preparation of a technical review of the architect's design to ensure that it reflects the goals and objectives of the program.
 - Preparation of Project budget and detailed master schedule.

- Provide recommendations for procurement strategies to meet Project budget and schedule.
- Develop methods for solicitation and prequalification for trade Consultants and distribution of addenda.
- Provide recommendations regarding value engineering and quality assurance.
- Application for necessary permits and licences.

STAGE 3: CONSTRUCTION

- Be the City's representative under all the Project contracts including the contract with the Consultant, the design consultant team and others as applicable.
- Supervise cost control and Project accounting.
- Cooperate with the Consultant to evaluate monthly progress payments for the Project under all related contracts between the City and the Consultant, trade Consultants, suppliers and others.
- Verify and justify change orders.
- Provide monthly progress reports indicating Project's status with respect to schedule, budget, change orders (approved, pending, and potential), look-ahead work plan, potential risks and recommendations and photographic records of construction.
- Coordinate the traffic management plan (both vehicular and pedestrian as required) during construction with the Consultant.
- Coordinate consultant testing and inspections of the work in progress, as required.
- Chair the construction kick off meeting and attend Project progress meetings.
- Monitor and ensure that quality assurance, quality control, safety procedures and practices are being performed.
- Coordinate with the Commissioning Authority, hired by the City, to ensure compliance with the Commissioning Plan and that all required documentation is in place and that all deficiencies are rectified to the satisfaction of the City
- Provide regular budget updates and cash flow forecast analysis to include changes orders (approved, pending, and potential) and any anticipated expenses to the City's Manager.
- Coordinate with the Consultant and design team the requirements for final occupancy
- Review, coordinate, and oversee Commissioning Plans
- Assist and coordinate with the design consultant team and Consultant in obtaining required occupancy permit and timely completion of deficiencies

STAGE 4: POST CONSTRUCTION

- In cooperation with the Consultant, coordinate compilation/submission of facility operation and maintenance manuals and as-built plans as per the City's requirements.
- Coordinate, track and resolve warranty issues
- Coordinate hand-over and occupancy of the facility.
- Manage the installation and delivery of FF&E.
- Manage the move of user groups as required.
- Coordinate commissioning, move in and start-up of operations.
- Prepare Project Closeout Report

3.0 EVALUATION AND SELECTION

3.1 Evaluation Criteria

The criteria for evaluation of the Proposals are listed in no particular order or precedence and include the following:

Corporate Experience, Qualifications and Resources – 35 points

- Demonstrated successful performance providing services similar in size, scope and complexity to municipal and commercial clients;
- Established local business office in metro Vancouver area;
- Project Manager(s) and other resource(s) qualifications and experience
- The consultants performance rating on previous projects for the City

Technical – 35 points

Methodology and Approach; for conducting the services

- Communication management and engagement.
- Approach and ability to meet project specifications, deliverables and objectives.
- Understanding of project requirements, implementation of strategy, and follow up.
- Identification of general project risks; management and mitigation.
- Change Management; changing priorities of Client and stakeholders, decision making protocols.
- Construction risk management; adherence to scope, schedule and budget in the face of unknown conditions or external factors.

Innovation and Creativity – 15 Points

- Provision of indicative methodology and innovative project management approaches.
- Value Added Benefits
- Sustainable Benefits

Financial – 15 points

- Details of fee structure
- Fees are to be billed on an hourly basis and work itemized in a monthly invoice. The proposal should show hourly rates throughout the contract period. Rates shall be fixed for the duration of the assignment. Do not include taxes.
- Disbursements

And, upon selection of one or more lead proponent(s):

- Interviews may be conducted to gain additional understanding of the proponents qualifications and fees
- References may be contacted

These criteria will be used to determine best overall value to the City as well as any other criteria that may become evident during the evaluation process.

The references of the preferred Proponent may be contacted to validate any part of the Proposal. The City reserves the right to conduct such independent reference checks or verifications as are deemed necessary by it to clarify, test, or verify the information contained in the Proposal and confirm suitability of the Proponent.

The City will not enter into a Contract with any Proponent whose references, in the City's sole opinion, are found to be unsatisfactory. Information obtained from references will not be disclosed to any proponents.

Evaluators are only able to evaluate information that has been included in a Proponent's Proposal, information that is known to evaluator(s) or information that is available on the intranet or from other public sources cannot be considered during the evaluation process.

3.2 Selection Process

Proposals will be reviewed and evaluated by an Evaluation Committee comprised of City staff.

The Evaluation Committee will evaluate proposals in accordance with the stated criteria to select one or more lead Proponent(s). Proposals may be evaluated in comparison to each of the other submissions.

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

The Evaluation Committee, may, at its sole discretion, request interviews with the highest ranked Proponent(s) to present their proposal. Information obtained from interviews will be included in completing the scoring of the evaluation.

Upon submission of a Proposal, Proponents agree that the City may disclose the names of Proponents that submit Proposals in response to this RFP and the total amount of the contract award, if any. However, no scores or unit prices will be provided to any Proponent.

The City reserves the right to accept or reject any or all proposals or cancel the RFP. The lowest proposal may not necessarily be accepted, rather will be analyzed to determine best overall value to the City.

The City does not guarantee the number of hours and the volume of work, if any, that will be available to any of the selected pre-qualified Consultants.

3.3 Negotiation

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

3.4 Notification of Award

The City will notify the successful Proponent (“Consultant”) in writing of their decision to place consultants on our qualified short-list for project management services.

Subsequent specific work assignments will be awarded through the issuance of a City Purchase Contract or Purchase Order (“PO”).

The City of Coquitlam [Terms and Conditions of Purchase](#) are posted on the City’s website and will apply to this contract.

4.0 INSTRUCTIONS TO PROPONENTS

4.1 Closing Date & Time

Proposals should be submitted on or before 2:00 pm (local time)

Wednesday, May 9, 2018

Proposals will not be opened in public.

4.2 Instructions for Proposal Submission

Proposal 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:** RFP name and number
- 2. Consolidate files into 1 .pdf document and Send**
(Ensure your web browser remains open until you receive two emails from Qfile to confirm receipt.)

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

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

Should assistance be required, phone 604-927-3060.

4.3 Enquiries

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

The City at its sole discretion will determine which enquiries require response, which will be provided to all interested parties by issue of written addenda and posted on the City's website before the Closing Date.

4.4 Addenda

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

Upon submitting a proposal, Proponents will be deemed to have received notice of all addenda that are posted on the City website, and deemed to have considered the information for inclusion in the Proposal submitted.

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

4.5 Withdrawal of Proposals

Proposals may be withdrawn by written notice of an authorized representative of the company sent to email: bid@coquitlam.ca prior to time set as closing time for receiving Proposals.

4.6 Liability for Errors

While the City has used considerable efforts to ensure an accurate representation of information in this RFP, the information contained is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the City, nor is it necessarily comprehensive or exhaustive.

4.7 Extension of Offer

The Consultant agrees to allow other local public agencies with similar needs within British Columbia to participate in this contract.

Additional participating agencies may opt to enter into a contract with the successful Consultant for the purchase of the products and services described in this RFP based on the terms, conditions, prices, and percentages offered by the Consultant to the City of Coquitlam with possibly minor changes negotiated.

This is intended to be means of promoting cooperative purchasing efforts with the public sector, and to provide additional value to the Consultant.

4.8 Instructions to Proponents

Proponents are advised that the rules for participation that will apply to this RFP are located on the City's website at: [Instructions to Proponents](#)

By submission of a proposal in response to this RFP, the Proponent agrees and accepts the rules by which the bid process will be conducted.



APPENDIX A

**City of Coquitlam
Contract No. 18-02-06**

**PROJECT MANAGEMENT SERVICES
CONTRACT**

(DRAFT)

BETWEEN: **The City of Coquitlam** *(the "City")*
 3000 Guildford Way
 Coquitlam, BC
 V3B 7N2

AND: **[Consultant's Name]** *(the "Consultant")*
 [Consultant's address]

THIS AGREEMENT WITNESSES that the City agrees to retain the Consultant to furnish certain consulting services, and the Consultant agrees to furnish the **Project Management Services** equipment and services under the terms and conditions as follows:

1.0 "Contract Documents" means the following documents:

- 1.1 (1) the Agreement: Section 01000
- (2) the Schedule of Services, Rates and Charges: Section 01200
- (3) the General Conditions: Section 01400
- (4) City of Coquitlam RFP No. 18-02-06
- (4) **[any other documentation eg. RFP, Consultant's proposal, etc];**

1.2 The Contract Documents shall form part of this Agreement as though recited in full.

1.3 In the event of discrepancies, inconsistencies or ambiguities in provisions of the Contract Documents, the provisions of the document that first appears on the list in Clause 1.1 shall take precedence and govern over the provisions of a document subsequently appearing on the list.

2.0 Services To Be Performed And Period Of Service:

2.1 The Consultant shall provide **Project Management Services** equipment and consumable supplies in accordance with RFP 18-02-06 (the "Services").

2.2 The Consultant shall perform and complete the Services with care, skill, due diligence and efficiency.

2.3 The Term of this Agreement will commence on **[date]** and will expire on **[date]**, unless otherwise extended or terminated by the parties.

3.0 Agreement Amount:

3.1 Subject to the terms and conditions of this Agreement and in consideration for the satisfactory performance of the Services, the City shall pay to the Consultant for the Equipment and Services provided as outlined in Section 01200 Schedule of, Rates and Charges.

3.2 Where progress payments are required the Consultant shall be paid on the basis of monthly progress billings for services performed and invoices approved by the City, all in accordance with Clause 18 of Section 01400.

3.3 The Agreement amount stated in Clause 3.1 does not include any applicable taxes, which are to be shown separately on all invoices submitted by the Consultant.

4.0 Time Of The Essence:

4.1 Time shall be of the essence in the performance of the Services.

5.0 Entire Agreement:

5.1 When duly executed by authorized officers of both parties, this Agreement constitutes the entire Project Management Services Agreement between the parties with respect to the subject matter hereof.

6.0 Amendment:

6.1 The Contract Documents shall not be amended except as specifically agreed to in writing by both the City and the Consultant.

7.0 Contract Administrator:

7.1 For the purposes of this Agreement, the City designates as its Contract Administrator:

[name, address , telephone , fax]

7.2 For the purposes of this Agreement, the Consultant designates as its Contract Administrator:

[name, address , telephone , fax]

8.0 Inurement:

8.1 This Agreement shall inure to the benefit of and be binding upon the City and the Consultant and their respective heirs, executors, legal representatives, administrators, successors and permitted assigns.

AGREED:

SIGNED on behalf of the City:

Authorized Signatory

Authorized Signatory

Name & Title

Name & Title

Date

Date

SIGNED on behalf of the Consultant:

Authorized Signatory

Authorized Signatory

Name & Title

Name & Title

Date

Date

1.0 Scope of Services:

RFP No. 18-02-06 - Scope of Services

2.0 Fees and Rates:

1.0 DEFINITIONS:

In this Agreement

- 1.1 “Agreement” means the agreement set out in Section 01000.
- 1.2 “Contract Administrator” has the meaning in Section 01000 Clause 7.0.
- 1.3 “Services” has the meaning set out in Section 01000 Clause 2.1, and
- 1.4 “Subcontractors” means the independent Consultants, associates and subcontractors retained by the Consultant to assist in the performance of the Services.

2.0 ASSIGNMENT:

- 2.1 The Consultant shall not assign the Agreement, in whole or in part, or any payments due or to become due under the Agreement, without the express written consent of the City.

3.0 STANDARD OF CARE AND QUALIFICATIONS:

- 3.1 The Consultant shall exercise the same degree of care, skill and diligence in the performance of the Services as is ordinarily possessed and exercised by Consultants experienced in providing such Services. The Consultant acknowledges that its qualifications and experience were a major factor in the selection of the Consultant for the work set out in this Agreement.
- 3.2 Without limiting any other remedy which the City may have, the Consultant at its sole cost upon written request of the City shall rectify any of the Services which have not been performed in accordance with the care, skill and diligence set out in Clause 3.1 or which have otherwise not been performed in accordance with the terms of this Agreement and in addition the Consultant shall do all such things that may be reasonably required by the City to satisfy the City that the Services have been duly rectified or performed in accordance with the terms of this Agreement.
- 3.3 The Consultant shall be responsible for the degree of care, skill and diligence exercised by any Subcontractors and for selecting Subcontractors having the appropriate qualifications and experience to provide that portion of Services to be provided by such Subcontractors.

4.0 CONFIDENTIALITY:

- 4.1 **Definition of Confidential Information.** In this Agreement, “Confidential Information” means all information and data disclosed orally, in writing or electronically, by one party to the other party on a confidential basis including, without limitation, all such information and data relating to the structure, personnel, and operations of the disclosing party, including financial, planning, marketing, advertising and commercial information and strategies; employee, supplier and customer information and data; contractual agreements, records and correspondence; computer programs, computer-related data and

databases; trade secrets, inventions, designs, methods, processes and know-how; and items provided or disclosed to a party by third parties under an obligation of confidentiality.

4.2 **Obligation of Confidentiality.** It is contemplated that in the course of the performance of this Agreement each party may, from time to time, disclose its Confidential Information to the other party. During the term of this Agreement and for a period of five (5) years thereafter, subject to Clause 4.3 and 4.4, each party agrees:

- (a) to keep and use in strict confidence all Confidential Information of the other party that it acquires, sees, or is informed of, as a direct or indirect consequence of this Agreement and to not, without the prior written consent of the other party, disclose any such Confidential Information; and
- (b) not to use, copy, duplicate or reproduce, either directly or indirectly, any of the Confidential Information of the other party or any recollections thereof for any purpose other than for the performance of its obligations under this Agreement, without the other party's prior written approval.

4.3 **Freedom of Information and Protection of Privacy Act.** The Consultant acknowledges and agrees that any Confidential Information disclosed by it to the City under this Agreement may be subject to disclosure under the *Freedom of Information and Protection of Privacy Act*, as amended from time to time (in this Clause, the "Act").

4.4 **Designation of Confidential Information.** The Consultant acknowledges that the Act provides an exemption from disclosure for information as specified in Section 21 of the Act. Accordingly, if any information supplied to the City fits within Section 21 of the Act, the Consultant must specifically advise the City and request the City not to disclose that information.

4.5 **Return of Confidential Information.** Upon expiration or earlier termination of this Agreement, each party shall promptly cease all use of the Confidential Information of the other party and upon written request will return all Confidential Information. This obligation shall not apply to any Confidential Information of the Consultant required by the City to make use of any work product under this Agreement.

5.0 CITY'S RESPONSIBILITIES:

5.1 The City shall provide timely support, guidance, direction, instruction, acceptances, decisions and information as the Contract Administrators agree necessary or appropriate under this Agreement.

6.0 INDEMNITY:

6.1 Notwithstanding the provision of insurance coverage by the City, the Consultant hereby agrees to indemnify and save harmless the City and its successor(s), assign(s) and

authorized representative(s) (the “Indemnified Parties”) and each of them from and against losses, claims, damages, actions, and causes of action, (collectively referred to as “Claims”) that the City may sustain, incur, suffer or be put to at any time either before or after the expiration or termination of this Agreement, that arise out of errors, omissions or negligent acts of the Consultant or its Sub-Consultant(s), servant(s), agent(s) or employees(s) under this Agreement, excepting always that this indemnity does not apply to the extent, if any, to which the Claims are caused by errors, omissions or the negligent acts of the City, its other Consultant(s), assign(s) and authorized representative(s) or any other persons.

6.2 The terms and conditions of Clause 6.1 shall survive notwithstanding the completion of all Services and the obligations and duties under this Agreement and the termination for any reason whatsoever of this Agreement.

6.3 The indemnity provided in Clause 6.1 by the Consultant to the Indemnified Parties shall not in any way be limited or restricted by the insurance set out in Clause 11 or by limitations on the amount or type of damages, compensation or benefits payable under the Workers’ Compensation Act or any other similar statute.

7.0 NO WAIVER:

7.1 No action or failure to act by the City shall constitute a waiver of any right or duty under the Agreement, or constitute an approval or acquiescence in any breach there under, except as may be specifically agreed in writing by the City.

8.0 CONSULTANT STATUS:

8.1 This is an agreement for the performance of Services and the Consultant is engaged under the Agreement as an independent Consultant for the sole purpose of providing the Services. Neither the Consultant nor any of the Consultant’s personnel is engaged by the Agreement as an employee, servant or agent of the City.

8.2 It is understood and agreed that the Consultant will act as an independent Consultant and that it is entitled to no other benefits or payments whatsoever other than those specified in the Agreement and Section 01200 Schedule of Rates and Charges.

9.0 DOCUMENTATION, PATENT AND COPYRIGHT:

9.1 **Title.** The title, property rights and ownership in and to all present and future materials, reports and information produced or prepared by the Consultant pursuant to this Agreement including but not limited to plans, drawings, specifications, computer discs, listings, computer software and any other material or physical item on which information is stored shall vest in the City without any payment by the City therefor.

9.2 **Patent and Copyright.** The title, property rights and ownership in and to all copyright in all present and future computer programs and software, and the title, property rights and ownership in and to all patent rights in any invention developed during the course of or out of providing the Services shall vest in the City without any payment by the City.

9.3 **Further Assurances.** The Consultant shall upon request by the City, do all such things and execute and deliver to the City all such documents and instruments as the City shall reasonably require in order to vest title, property rights and ownership in the City as provided in Clause 9.1 and 9.2 and the Consultant shall execute and deliver all such assignments, documents and instruments as may, in the City's opinion, be necessary or desirable for the application or the issuance of any patents, designs or the registration of any copyright.

10. NOTICES:

10.1 Where in the Agreement any notice, request, direction, or other communication is required to be given or made by either party, it shall be in writing and is effective if delivered in person, sent by registered mail, or by facsimile addressed to the party for whom it is intended at the address specified in Clause 7 of the Form of Agreement. Any notice, request, direction or other communication shall be deemed to have been given if by registered mail, when the postal receipt is acknowledged by the other party; by facsimile when transmitted. The address of either party may be changed by notice in the manner set out in this provision.

11.0 WORKERS' COMPENSATION, INSURANCE AND BUSINESS LICENCE:

11.1 Workers' Compensation Board (WCB) Requirements

11.1.1 The Consultant agrees that it shall at its own expense procure and carry or cause to be procured and carried and paid for, full Workers' Compensation Board coverage for itself and all workers, employees, servants and others engaged in or upon any work or service which is the subject of this Agreement. The Consultant agrees that the City has the unfettered right to set off the amount of the unpaid premiums and assessments for such Workers' Compensation Board coverage against any monies owing by the City to the Consultant. The City shall have the right to withhold payment under this Agreement until the Workers' Compensation Board premiums, assessments or penalties in respect of work done or service performed in fulfilling this Agreement had been paid in full.

11.1.2 The Consultant shall provide the City with their Workers' Compensation Board registration number and a "Clearance Letter" from WorkSafeBC confirming that they are registered and in good standing with the Workers' Compensation Board and that all assessments have been paid to the date.

11.1.3 The Consultant shall indemnify the City and hold them harmless from all manner of claims, demands, costs, losses, penalties and proceedings arising out of or in any way related to unpaid Workers' Compensation Board assessments owing from any person or corporation engaged in the performance of this Agreement or arising out of or in any way related to the failure to observe safety rules, regulations and practices of the Workers' Compensation Board, including penalties levied by the Workers' Compensation Board.

11.2 Insurance to be provided by the Consultant

11.2.1 The Consultant shall provide, maintain and pay for the following insurance:

(a) Commercial General Liability Insurance

Commercial General Liability Insurance providing third party bodily injury and property damage coverage in an amount of not less than **\$2,000,000** per occurrence, indicating that the City is an additional insured and containing a cross liability and/or severability of interest clause protecting each insured to the same extent as if they were separately insured.

The Policy shall contain a clause providing that the City will receive 30 days' notice of cancellation or of any material change in coverage that will reduce the extent of coverage provided to the City. The certificate will also indicate that the policy contains non-owned automobile liability and contractual liability coverage. The insurance policy will be in a form and with a company that is, in all respects, acceptable to the City.

(b) Automobile Liability Insurance

Automobile liability insurance with respect to owned and leased automobiles used directly or indirectly in the performance of the Services covering liability for bodily injury, death and damage to property with a limit of not less than \$2,000,000. inclusive for each and every loss.

(c) Consultant Equipment Insurance

“All risks” equipment insurance covering owned and non-owned machinery and equipment used by the Consultant for the performance of the Services to its full replacement value.

11.2.2 Prior to commencing any work the Consultant shall provide to the City certificates of insurance that shall include a provision that such insurance shall not be cancelled or modified without at least 30 days written notice to the City.

11.3 City of Coquitlam Business Licence

11.3.1 Where the head office of the Consultant is located within the City of Coquitlam and/or where the Consultant is required to perform any work at a site within the City of Coquitlam, the Consultant shall have a valid City of Coquitlam business license throughout the duration of the Agreement.

12.0 DELAY IN PERFORMANCE:

12.1 Neither the City nor the Consultant shall be deemed to be in default of this Agreement for delays in performance caused by circumstances beyond the reasonable control of the non-performing party. For purposes of this Agreement, such circumstances include, but are not limited to abnormal weather conditions, flood, earthquake, fire, epidemic, war, riot and other civil disturbance, strike, lockout, and other labour disturbances, sabotage, judicial restraint and inability to procure permits, licenses or authorizations from any local, provincial or federal agency for any of the supplies, materials, accesses or services required to be provided by either the City or the Consultant under this Agreement. If any such circumstances occur, the non-performing party shall, as soon as possible after being prevented from performing, give written notice to the other party describing the circumstances preventing continued performance and the efforts being made to resume performance of this Agreement.

13.0 SEVERABILITY:

13.1 The invalidity, illegality or unenforceability of any provision of this Agreement or the occurrence of any event rendering any portion or provision of this Agreement void shall in no way affect the validity or enforceability of any other portion or provision of this Agreement. Any void portion or provision shall be deemed severed from this Agreement and the balance of this Agreement shall be construed and enforced as if this Agreement did not contain the particular portion or provision held to be void.

14.0 CONFLICT OF INTEREST:

14.1 The Consultant declares that the Consultant has no pecuniary interest in the business of any third party that would cause a conflict of interest or be seen to cause a conflict of interest in carrying out the Services. Should such an interest be acquired during the term

of the Agreement, the Consultant shall declare it immediately in writing to the City. If the Consultant does declare a conflict of interest the City may direct the Consultant to resolve the conflict of interest to the City's satisfaction and the Consultant shall do so.

15.0 GOVERNING LAW:

15.1 The Agreement shall be construed under and according to the laws of the Province of British Columbia and subject to an agreement to refer a dispute to arbitration under Clause 16, the parties agree to irrevocably attorn to the jurisdiction of the Courts of the Province of British Columbia.

16.0 DISPUTE RESOLUTION:

16.1 All claims, disputes or issues in dispute between the City and the Consultant shall be decided by arbitration if the parties agree, or failing agreement, in a Court of competent jurisdiction within the Province of British Columbia and be governed by the laws of British Columbia.

16.2 In the event that the parties agree to arbitration, pursuant to Clause 16.1, the arbitration shall be governed by the rules of the British Columbia International Commercial Arbitration Centre, except that the arbitrator or arbitrators shall be agreed upon by the parties, and failing agreement by the parties, shall be appointed by a Court of competent jurisdiction within the metro Vancouver area in the Province of British Columbia.

16.3 In the event that the parties agree to arbitration, the arbitration shall take place in Vancouver, British Columbia and be governed by the laws of British Columbia.

16.4 The procedure set out in this Clause 16 is not meant to preclude or discourage informal resolution of disagreements between the City and the Consultant.

17.0 TERMINATION:

Termination for Default

17.1 The City may terminate the Agreement if the Consultant at any time becomes bankrupt, makes an assignment of his property for the benefit of his creditors, or if a receiver or liquidator should be appointed. Such termination shall be effective upon the City giving written notice thereof.

17.2 The City may terminate the Agreement in whole or in part in writing if the Consultant defaults in the fulfilment of any or all of its obligations under this Agreement provided that, except in the case where the City acting reasonably deems it impractical, the Consultant shall be entitled to cure the default within 10 days of receipt of written notice from the City. Failure to cure the default within the 10-day period or as mutually extended by agreement between the City and the Consultant, shall entitle the City to terminate this Agreement immediately.

- 17.3 If the City terminates the Agreement under Clause 17.1 or 17.2, upon receipt of written notice of termination, the Consultant shall discontinue providing the Services in accordance with the notice and within the period of time set out in the notice deliver to the City all drafts, reports, drawings, plans, specifications, computer discs, software and all other information and materials relating to the Services.

Termination without Default

- 17.4 Notwithstanding the provision of Clause 17.1 or 17.2, the City shall be entitled at any time during the Agreement to terminate this Agreement upon thirty (30) days written notice to the Consultant. Upon receipt of written notice of termination, the Consultant shall discontinue providing the Services in accordance with the notice and within the period of time set out in the notice deliver to the City all drafts, reports, drawings, plans, specifications, computer discs, software and all other information and materials relating to the Services.
- 17.5 Upon termination under Clause 17.4, the City shall pay to the Consultant in accordance with Section 01200 for the Services provided to the date of termination together with the actual and reasonable out-of-pocket expenses directly and necessarily incurred by the Consultant as a result of the termination. The Consultant may not claim loss of profit on the balance of the Services not fulfilled because of the termination.

18.0 PAYMENT:

- 18.1 The Consultant shall submit invoices to the City in PDF format sent by email to: apinvoices@coquitlam.ca for Services performed monthly (the “billing period”) during which the Services are performed under this Agreement; such invoices to be submitted as soon as practicable after each billing period.
- 18.2 The invoice submitted for each billing period shall be clearly itemized to show the PO number, amount of work performed, the billing rates, the reimbursable expenses and the costs incurred to employ any Subcontractors. The Consultant shall also provide to the City upon written request such receipts, bills, invoices or other evidence in support of each invoice for a billing period as the City shall request.
- 18.3 Except for the amounts which the City in good faith is disputing and except for any set off which the City may claim and except for invoices (or portions of invoices) in respect of which the City has requested and not received supporting evidence under Clause 18.2, the City shall pay invoices submitted to it for the Services within 30 days of receipt thereof.
- 18.4 The Consultant shall keep and shall cause any Subcontractors to keep books, records, documents and other evidence relevant to the provision of the Services in accordance with generally accepted accounting principles and practices consistently applied. The City or any of its duly authorized representatives shall for the purpose of audit and examination have access to and be permitted to inspect such books, records, documents and any other

evidence for inspection, copying and audit for a period of three years after the termination, for any reason, of this Agreement.

19.0 SUBCONTRACTORS:

19.1 Upon written approval by the City, the Consultant may retain Subcontractors to assist in the performance of the Services provided that, where appropriate, the terms of this Agreement shall apply to the Subcontractors and provided that the Consultant shall be wholly responsible for the professional standards, performance and all actions of the Subcontractors. The City may request a copy of Terms and Conditions entered into by the Consultant with any subcontractor and the Consultant shall comply. The Consultant shall only employ Subcontractors having the appropriate standards, qualifications and experience in their respective areas of expertise.

20.0 EXTRA WORK:

20.1 Extra Work means the furnishing of services not directly or by implication called for in the Agreement. If the City requires extra work it may do so by itself or by the employment of others or it may direct the Consultant to do the extra work by issuance of a written direction. The Consultant shall perform any extra work at the rates provided for in Section 01200.

21.0 WORK AND SERVICES OMITTED:

21.1 Upon receipt of written direction from the City, the Consultant shall omit Services to be performed under the Agreement. The Consultant shall have no claim against the City for loss associated with any omitted Services.

22.0 THIRD PARTY RIGHTS:

22.1 Nothing in this Agreement shall be construed to give any rights or benefits to anyone other than the City and the Consultant.

23.0 CHANGES TO SCOPE OF SERVICES:

The City may at any time vary the scope of work to be provided by the Consultant as part of the Services. In that case and where this Agreement contains a limit or limits in Clause 3.0 (Agreement Amount) of Section 01000 (FORM OF AGREEMENT) as to the maximum fees and disbursements to be paid to the Consultant for all or any part of the Services, such limit or limits shall be adjusted as agreed to by both parties in writing and failing agreement, as reasonably determined by the City. Should the Consultant consider that any request or instruction from the City constitutes a change in the scope of the work, the Consultant shall so advise the City within ten (10) days in writing. Without said written advice within the time period specified, the City shall not be obligated to make any payments of additional fees to the Consultant.

24.0 NON-RESIDENT WITHHOLDING TAX:

- 24.1 If the Consultant is, at any time, a non-resident of Canada, within the meaning of the *Income Tax Act* of Canada as amended, then, and the Consultant hereby so agrees, the City may deduct from all monies payable under this Agreement and remit to the Receiver-General of Canada, the Government of Canada or Canada Revenue Agency, Taxation sums not greater than the greater of:
- 24.1.1 Fifteen percent (15%) of all monies payable under this Agreement; and
 - 24.1.2 sums required to be withheld and remitted by the *Income Tax Act* of Canada as amended.
- 24.2 The City will receive full credit under this Agreement for monies withheld as of and from the date of the withholding (regardless of when or whether remitted) and no interest will be payable by the City on sums withheld, not remitted as aforesaid, and later paid directly to the Contractor.
- 24.3 Exemption from this withholding tax is available in some circumstances, but the Consultant must apply directly to the Canada Revenue Agency (CRA) at least thirty (30) days prior to commencing services for a “Certificate of Exemption”.



**CITY OF COQUITLAM
RFP No. 18-02-06**

Project Management Services

**Proposals should be received on or before 2:00 pm local time
Wednesday, May 9, 2018
(Closing date and time)**

Instructions for Proposal Submission

Proposal 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:** 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 Proposal Submission Form

Submitted by: _____
(Company name)

1. Corporate Experience and Resources

- 1.1. Provide Corporate profile, location of branches, background, stability, structure, number of years in business;
- 1.2. Availability: the hours during which the Services are available;
- 1.3. Servicing resources, capability and capacity, as relevant;

2. Hourly Charge Out Rates / Fee Structure

Provide complete details on the fee structure.

- 2.1. Fees are to be billed on an hourly basis and work itemized in a monthly invoice. The proposal should show hourly rates throughout the contract period. Rates shall be fixed for the duration of the assignment (exclude GST).
- 2.2. The rates/fees should be supplemented with a description as to the types of services provided by personnel at each price point.
- 2.3. The successful proponent(s) will be expected to provide the City with a price quote in advance of the commencement of each individual project. Quotes will outline hours and rate(s) or a fixed fee (exclude GST).

| Service | Name | Qualifications (i.e. PM Certification) | Regular Hourly Rate | Overtime Hourly Rate |
|----------------------------------|-------------|--|----------------------------|-----------------------------|
| Account Manager | | | | |
| Principal and Specialists | | | | |
| Project Manager | | | | |
| Senior Project Manager | | | | |
| Project Coordinator/ Jnr Manager | | | | |
| Project Admin/Assistant | | | | |
| Other | | | | |
| Other | | | | |

3. Disbursements

Overhead charges considered to be a cost of doing business should be included in the hourly fees. Disbursements are to be identified and actual expenses will be considered.

Describe potential disbursements and additional charges.

| |
|--|
| |
|--|

4. Personnel

- 4.1. Identify key personnel including the Project Manager and Back-up Project Manager that will be assigned to the City.
- 4.2. Include with your Proposal submission a brief CV for each limited to 1 page maximum.

| Name | Title/Position | Years with Firm | Experience |
|------|----------------|-----------------|------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

5. Approach and Methodology

- 5.1. Methodology, approach and ability to meet project specifications, deliverables and objectives.
- 5.2. Communication management.
- 5.3. Understanding of project requirements, implementation of strategy and follow-up.
- 5.4. Identification of project risks, management and mitigation.
- 5.5. Change Management; changing priorities of Client and stakeholders, decision making protocols.
- 5.6. Construction risk management; adherence to scope, schedule and budget in the face of unknown conditions or external factors.

6. Health & Safety

- 6.1. Confirm your company has a safety plan policies and procedures, will follow worksite safety practises, has knowledge of WorksafeBC guidelines and requirements;
- 6.2. Confirm if your company is COR (certificate of recognitions) certified and if so, please attach certificate.

7. Support

- 7.1. Confirm the location of work, whether the Proponent would be working out of their company office or expect to have a workstation at the City, including recommendation and rationale;
- 7.2. Describe how the price structure might change or what addition/deduction of charges would apply by choice of options (if any);
- 7.3. Describe the level of support expected to be provided by the City including software and systems required to perform the services.
- 7.4. Describe administration for creating meeting minutes, documenting contemplated change orders, change orders, change directives and documenting site instructions.

8. Sustainable Benefits

Provide information on service delivery that would be a **benefit to the City**.

9. Value Added Benefits

The City encourages innovation and creative solutions. Describe any additional opportunities or added value services that would assist or **benefit the City**.

10. Experience And References

Consultants shall be qualified in performing the services requested. Contracts indicated below should evidence experience in project planning and construction management of public sector projects similar in size and scope for both parks and facilities.

Proponents agree that by providing information below, the City has permission to contact references provided. Information obtained from references will not be disclosed or discussed with any proponents.

10. Experience And References (cont'd)

| | |
|--|--|
| PROJECT 1 | |
| Project Title and Year | |
| Project Budget | |
| Final Contract Value | |
| Client Company Name | |
| Consulting services budget | |
| Brief description of the Project including methodology | |
| Initial Schedule (Duration) | |
| Actual Schedule | |
| Describe why you believe the project was successful and the role your firm had in the success (scope schedule, budget and customer satisfaction) | |
| Client contact person and Title | |
| Telephone and email | |

10. Experience And References (cont'd)

| | |
|--|--|
| PROJECT 2 | |
| Project Title and Year | |
| Project Budget | |
| Final Contract Value | |
| Client Company Name | |
| Consulting services budget | |
| Brief description of the Project including methodology | |
| Initial Schedule (Duration) | |
| Actual Schedule | |
| Describe why you believe the project was successful and the role your firm had in the success (scope schedule, budget and customer satisfaction) | |
| Client contact person and Title | |
| Telephone and email | |

10. Experience And References (cont'd)

| | |
|--|--|
| PROJECT 3 | |
| Project Title and Year | |
| Project Budget | |
| Final Contract Value | |
| Client Company Name | |
| Consulting services budget | |
| Brief description of the Project including methodology | |
| Initial Schedule (Duration) | |
| Actual Schedule | |
| Describe why you believe the project was successful and the role your firm had in the success (scope schedule, budget and customer satisfaction) | |
| Client contact person and Title | |
| Telephone and email | |

11. Demonstrated Ability to Complete Assignments on time and within budget:

| | |
|----|---|
| 1. | Briefly describe how your company will complete assignments on time and within budget and ability to anticipate issues: |
| 2. | Timeline - In the past 5 years, has your firm been late in delivering an assignment to the City, or for a client referenced? |
| 3. | What were the reasons for the delay? |
| 4. | Did your firm make attempts to mitigate the issue? |
| 5. | Budget and Cost Control - In the past 5 years, has your firm been over budget in delivering an assignment to the City, or a client referenced? |
| 6. | What were the reasons for being over budget? |
| 7. | Did your firm attempt to mitigate the issue? |

12. Compliance

Proponents shall describe any deviations to the RFP they would be unwilling to comply with and propose conditions to be added.

13. Acceptance

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

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

14. Conflict of Interest

Proponents must disclose information regarding relationships that may be perceived to be a conflict of interest in doing business with the City.

15. Addenda

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

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

16. 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.