



**VILLAGE OF TELKWA**

**REQUEST FOR PROPOSALS**

**for the**

**VILLAGE OF TELKWA ASSET MANAGEMENT**

**POLICY, RISK ASSESSMENT &**

**LIFECYCLE PLANNING PROJECT**

**RFP # 6955-01**

**Request Issued: September 26, 2022**

**Closing Date: November 15, 2022**



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## 1. INTRODUCTION

### 1.1 PURPOSE

The Village of Telkwa (the “Village”) is requesting submission of Proposals from qualified Consultants to improve the Village’s Asset Management practices and financial strategy to meet capital lifecycle requirements. It is also significant that a feasible approach is developed in consideration of the financial implications to the tax payers and the current financial position of the Village. This project will provide the Village with increased opportunities for the Village’s ongoing goal of good stewardship of assets, resources and funds of the community.

### 1.2 BACKGROUND

The Village started developing the components of an Asset Management (AM) Plan over the last few years, including AM for water, sewer and the municipal building. The expertise of a consultant is sought to develop and implement a comprehensive AM policy and plan for all Village municipal infrastructure assets. This will enable the Village to plan and replace assets accordingly, maintain infrastructure, forecast infrastructure replacement and enhance needs, providing assurance that the community will have access to safe water, road networks, bridges, wastewater systems, facilities, and other assets, while allowing for economic growth through better AM practises. Developing a system-wide approach is significant in order to improve operations and to forecast tangible and feasible investments on the Village’s capital infrastructure.

## 2. INSTRUCTIONS TO PROPONENTS

### 2.1 SUBMISSION FOR PROPOSALS

All contract documents are available through the BC Bid website. The Proponent is solely responsible for ensuring any addenda are downloaded, reviewed and included in their bid.

Proposals will be accepted up to **November 15, 2022 @ 2:00 pm**. Proposals must be sealed in an opaque envelope, clearly marked with the name and the project name/number, and will be received by Rowena Atienza-Paquette, Director of Finance at: Box 220, Telkwa, BC V0J 2X0 or 1415 Hankin Avenue, Telkwa, BC. Proposals will also be accepted by email, if received by the deadline at [directoroffinance@telkwa.ca](mailto:directoroffinance@telkwa.ca) and [admin@telkwa.ca](mailto:admin@telkwa.ca).

It is the sole responsibility of the Proponent to ensure that its Proposal is received at the above location and by the time stipulated. Proposals received after the stipulated time will be rejected and returned to the Proponent unopened. The Village of Telkwa reserves the right to accept or reject all or any Proposal and to waive any informality, incompleteness or error in any Proposal.

Proponents must refer to the RFP documents for the terms governing the bid process. All Proposals received by the Village of Telkwa Director of Finance become the property of the Corporation of the Village of Telkwa and, as such, are subject to the *Freedom of Information and Protection of Privacy Act*. Once a Contract has been awarded, the name(s) of the successful Proponent(s) will be available to the public upon request.

Proposals must be received prior to the closing time and in the manner noted above. The Proponent must sign the documents or the Proposal cannot be accepted. The Proponent, by signing, confirms that he or she is authorized to legally bind the Proponent. The legal name and address of the Proponent is to be used on the Proposal documents. Pricing is to be in Canadian dollars. Three copies of submissions are to be provided.



## 2.2 ENQUIRIES

All enquiries related to this RFP are to be directed, in writing, to the following person:

**Contact:** Rowena Atienza-Paquette  
Director of Finance  
**Phone:** (250) 846-5212  
**Email:** [directoroffinance@telkwa.ca](mailto:directoroffinance@telkwa.ca)

Information obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be distributed through an addendum at the Village of Telkwa's option.

Any questions regarding this RFP must be submitted at least five (5) working days prior to the Closing Date. Any questions submitted after this date may not be answered.

Proponents shall carefully examine the RFP documents and shall fully inform themselves as to the intent, existing conditions and limitations, which may affect their Proposal submission. No consideration will be given after submission of a Proposal to any claim that there was any misunderstanding with respect to the conditions imposed.

Proponents finding discrepancies or omissions in the Contract or RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the above-listed project contact. If there are any changes, additions, or deletions to the Proposal scope, conditions, or closing date, Proponents will be advised by means of an Addendum on the B.C. Bid website issued by the Village of Telkwa. All Addenda are to become part of the Proposal documents and receipt of Addenda should be acknowledged by the Proponent in the submission.

Verbal discussion between the Village of Telkwa Mayor, Deputy Mayor, Councillors or staff and a Proponent shall not become a part of the RFP or modify the RFP unless confirmed by written Addendum. The Village of Telkwa shall not be responsible for Proponents adjusting their Proposals based only on oral instructions by any representative of the Village of Telkwa.

## 3. GENERAL TERMS OF PROPOSAL PROCESS

### 3.1 DEFINITIONS

**"Addenda"** means all additional information regarding this RFP including amendments to the RFP;

**"Agreement"** or **"Contract"** means a contract that is issued to formalize the Work with the successful Proponent based on the Proposal submitted and incorporate by reference the Request for Proposal, any addenda issued, the Proponent's response and acceptance by the Village of Telkwa;

**"Consultant"** means the person(s), firm(s) or corporation(s) appointed by the Village of Telkwa to carry out all duties, obligations, work and services first contemplated in the Request for Proposal and all associated documentation, which may also include mutually agreed revisions subsequent to submission of a Proposal;

**"must"** or **"mandatory"** or **"shall"** means a requirement that must be met in order for the Proposal to receive consideration;

**"Proponent"** means the responder to this RFP with the legal capacity to contract;

**"Proposal"** means a written response to the RFP that is submitted by a Proponent;



**“Qualified Professional”** means a person with experience and training in the pertinent discipline, and who is a qualified expert with expertise appropriate for the relevant critical area;

**“Request for Proposals”** or **“RFP”** means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by the Village of Telkwa;

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

**“should”** or **“may”** means a requirement having a significant degree of importance to the objectives of the RFP but is not a mandatory requirement;

**“Work”** means and includes anything and everything required to accomplish the project in accordance with this RFP and Proposal.

### 3.2 ACCEPTANCE OF TERMS AND CONDITIONS

Submitting a Proposal indicates acceptance of all the Terms and Conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A person authorized to sign on behalf of the Proponent must sign the Proposal.

### 3.3 PROPOSAL PREPARATION COSTS

All expenses incurred by the Proponent in preparation and submission of this Proposal are to be borne by the Proponent, with the express understanding that no claims for reimbursements against the Village, will be accepted. The Village shall not be responsible for any costs involved in or associated with any meetings, discussion or negotiation following submission that could lead to acceptance of the Proposal and award of a Contract.

### 3.4 PROPOSAL EVALUATION

The Village recognizes that “Best Value” is the essential part of purchasing a product and/or service and, therefore, the Village may prefer a Proposal with a higher price if it offers greater value and better serves the Village’s interests, as determined by the Village, over a Proposal with a lower price.

Appendix A contains the information regarding how Proposals will be evaluated.

The Village of Telkwa, at its sole discretion, reserves the right to:

- reject any or all Proposals whether complete or not;
- reject any Proposal it considers not in its best interests;
- waive any minor irregularity or insufficiency in the Proposal submitted;
- not be liable for misunderstandings or errors in the Request for Proposals;
- issue addenda to the Request for Proposals;
- contact references provided by the Proponents;
- retain independent persons or contractors for assistance in evaluating Proposals;
- request points of clarification to assist the Village of Telkwa in evaluating Proposals;
- negotiate changes with the successful Proponent; and
- award separate contracts for separate work components, and withdraw the Request for Proposals.



### **3.5 PROPOSAL PRESENTATION**

The Village reserves the right to request one or more of the Proponents whose submissions are of particular interest to the Village, to make an oral presentation to the Village.

### **3.6 NO CONTRACT**

This RFP is not a tender and does not commit the Village in any way to select a preferred Proponent. By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on the Village by this RFP or submissions prior to the completed execution of a formal written Contract.

### **3.7 NO OBLIGATION TO PROCEED**

The Village fully intends at this time to proceed with the proposed project; however, the Village is under no obligation to proceed to award of the Contract. The receipt by the Village of any information (including any submissions, ideas, plans, drawings, models or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the Village.

There is no guarantee by the Village that the process initiated by the issuance of this RFP will continue, or that this RFP process or any RFP process will result in a Contract with the Village for the purchase of the equipment, service, or project.

### **3.8 NEGOTIATION WITH PREFERRED PROPONENT**

The Proponent that submits the most advantageous Proposal may be awarded the Contract. The Village reserves the right to accept or reject all or parts of the Proposal; however, the Village is not precluded from negotiating with the preferred Proponent to modify its Proposal to best suit the needs of the Village.

The Village will enter into negotiations with a preferred Proponent to finalize any scope changes necessary to implement the project, as generally described in this RFP. If the Village considers that it is unlikely to settle such agreements with the preferred Proponent despite having negotiated with the preferred Proponent, the Village is entitled to cease negotiations with the preferred Proponent and to begin negotiations with another Proponent.

### **3.9 ACCEPTANCE OF PROPOSAL**

Following acceptance of the Proposal, the successful Proponent will be expected to execute an Agreement with the Village outlining terms of the Agreement.

The expected attachments to the Agreement will include the Request for Proposal, the Proponent's Proposal submission and any mutually agreed upon modifications, changes or negotiated adjustments.

### **3.10 LIABILITY FOR ERRORS**

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

Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the Scope of Work.



### 3.11 PROPOSAL CONFIDENTIALITY AND PROPRIETARY INFORMATION

All submissions become the property of the Village and will not be returned to the Proponent. The Village will consider all Proposals submitted as confidential but reserves the right to make copies of all Proposals received for its internal review and for review by its financial, accounting, legal, and technical consultants.

Proponents should be aware that the Village is a “public body” as defined in and subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

If the Proponent believes any of the information requested in this RFP and provided by them is confidential, then they should identify it as such and provide a rationale as to why it should not be released under “Freedom of Information” legislation.

### 3.12 CONFLICT OF INTEREST

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the Village, its elected or appointed officials or employees, any property ownership direct or indirect in the project area. The Village may rely on such disclosure.

### 3.13 NO COLLUSION

Except as otherwise specified or as arising by reason of the provision of the Contract documents, no person whether natural, or body corporate, other than the Proponent has or will have any interest or share in this Proposal or in the proposed Contract which may be completed in respect thereof.

There is no collusion or arrangement between the Proponent and any other actual or prospective Proponents in connection with Proposals submitted for this project and the Proponent has no knowledge of the contents of other Proposals and has made no comparison of figures or Agreement or arrangement, express or implied, with any other party in connection with the making of the Proposal.

### 3.14 NOT AN EMPLOYEE

The successful Proponent will acknowledge and agree that neither the Proponent nor any person employed by or associated with the successful Proponent in the performance of the services or otherwise, is an employee of, or has an employment relationship of any kind with the Village or is in any way entitled to terms or conditions of employment or employment benefits of any kind whatsoever from the Village under any Collective Agreement or otherwise including but not limited to private programs or coverages and statutory programs and coverages, whether under the *Employment Standards Act* of British Columbia (as amended from time to time), the *Workers Compensation Act* of British Columbia (as amended from time to time), the *Employment Insurance Act* of Canada (as amended from time to time), health pay contributions or otherwise.

### 3.15 LITIGATION

Proponents who, either directly or indirectly through another corporation or entity, have been or are in litigation, or who have served notice with intent to proceed with court action against the Village in connection with any contract for works or services, may be considered ineligible Proponents. Receipt of Proposals from such Proponents may be disqualified from the evaluation process.



#### 4. GENERAL PROPOSAL CONTENT

##### 4.1 CONSULTANT INFORMATION

- COMPANY INFO: Full name, address and telephone number of the submitting office of the Proponent and where applicable, the name, address and telephone number of any branch office, affiliate or sub-consultant(s) that will be involved in the project.
- PROJECT MANAGER: The Proposal shall confirm the proposed Project Manager who will be the single point of contact, and responsible for direct interaction with the Village. Describe the work to be performed by the Project Manager and his/ her qualifications and substantive experience directly related to the proposed Work.
- PROPOSED PROJECT TEAM: The Proposal shall list key individuals including the Project Manager and sub-consultant(s) who will have major responsibilities for the performance of the Work. Describe the Work to be performed by each listed individual and their qualifications, in terms of education and substantive experience directly related to the proposed Work. Capacity and ability of the Project Manager and Project Team to deliver the services within the defined timeframe must be discussed.

The Proposal shall include the following endorsement:

“Identified Key Project Team members shall only be replaced with written approval of the Village of Telkwa.”

- REFERENCES: The Proposal shall provide no less than two (2) references that are relevant to the proposed Work. The references should be from a third party who can provide information about the performance of the Proponent in delivering the works or services for the experience cited.
- EXPERIENCE: The Proposal should include details on only the most recent three (3) or four (4) projects of related work for the Consultant and project team. It is the Proponent’s responsibility to demonstrate that they possess the required knowledge, understanding and capacity to carry out the Work as outlined in this RFP within the project schedule and budget.

##### 4.2 SUBCONTRACTORS AND SUBCONSULTANTS

The Proposal shall include the company name of all subcontractors and subconsultants proposed to be used in the performance of the Work with a description of the work they would be performing.

The subcontractors and subconsultants listed in the Proposal may not be changed without the written consent of the Village. If the Village so requires, the Proponent shall be prepared to confirm to the Village the competence of subcontractors and subconsultants prior to acceptance of the Proposal.

##### 4.3 METHODOLOGY

The Proposal shall contain an outline of strategies and skills that will be used to manage the project’s expectations, resources, budget and to ensure quality control. The methodology must discuss how the Work will be completed that is listed in Scope of Work. Include other items identified and what services or interaction is required from/with the Village of Telkwa.

In their own words, the Proponent must show that they have an understanding of what the Work involves and what is required to complete the project, specifically an understanding of the project’s critical issues and fixed budget.





#### 4.4 FEES AND DISBURSEMENTS

The Proposal shall contain a breakdown of fees by task.

The Proposal shall specify a maximum or upset fee up to and including the completion of the deliverables outlined in this RFP. The maximum costs or upset fees will include all labour, equipment, sub-consultant expenses, permits, approvals and disbursement costs.

A schedule of hourly rates for all personnel, equipment and disbursement rates (includes transportation expenses) for the project shall be included in the Proposal. The rates provided in the Proposal shall remain at these set rates through the entire project.

All prices quoted to be in Canadian dollars.

#### 4.5 PROPOSAL CONTENT & INNOVATION

The Proponent shall address in the Proposal submission, all the information as requested in the RFP documentation. The Proponent is also encouraged to include innovative, alternative or unique solutions to the Proposal subject.

#### 4.6 SAFETY REQUIREMENTS

During completion of the Work, the Consultant is required to meet or exceed at all times, any requirements as detailed at the place of Work, which includes but not limited to all OH&S regulations or standards.

#### 4.7 WORKERS COMPENSATION ACT

The Proponent, and any proposed subcontractors and subconsultants, should provide a Work Safe BC (Workers Compensation Board) Registration Number in the Proposal and shall at the time of signing a Contract Agreement, provide proof of payment of claims in good standing with Work Safe BC.

### 5. TERMS OF REFERENCE

#### 5.1 SCOPE OF WORK

A general scope of the work expected to be completed by the successful Proponent is outlined below. The Proposal is required to describe the methodology to address the identified tasks and team members who will be responsible for completing those tasks. The Scope of Work is not an exhaustive list of the work to be undertaken and proponents are encouraged to supplement and build upon the Scope of Work in their proposal as necessary and appropriate to benefit the project.

- Provide a high-level project plan for the purpose of supporting the development of an Asset Management (AM) policy and AM plan.
- Review existing inventory and develop an analysis of the existing state of infrastructure (baseline assessment), including data gap analysis across all asset categories. The analysis must include information on each asset, including replacement cost, condition, service-life remaining and capital needs forecast.
- Create an AM Plan to proactively manage asset deterioration and lifecycle management strategies, as well as planning for new infrastructure, upgrade or disposal of existing infrastructure.
- Develop a phased-in financial and risk strategy, including recommendations to eliminate the infrastructure deficiency and reach a sustainable level of infrastructure investment to maintain current levels of service and capital operational costs.



- Supply asset management software and training thereof to provide the Village with a complete asset registry for: all asset types; asset management reporting; financial reporting; and AM functions, including lifecycle planning, risk management, levels of service and decision optimization.
- Software training and support to be provided to all relevant users regarding the system's functionality.
- Develop a comprehensive AM policy for approval by the Village staff and Council. The policy will be used as a reference, committing the Village to improved management of municipal infrastructure assets, improved accountability and transparency to the community through the adoption of best practices.
- Provide AM training to Village staff on the importance of AM and how to implement key factors of municipal AM, including: risk modeling, lifecycle modeling, asset capturing, condition protocols, policy and how to communicate AM.

## 5.2 SCHEDULING

The intent of the Village is to have this project started in winter 2022 and completed by October 2023.

The Proposal shall contain a work schedule showing the major activities or tasks, order and interdependence of the various milestones, sub-tasks and deliverables for each of the required tasks, including any proposed meetings.

## 5.3 PROJECT MANAGEMENT

Provide Project Management services throughout all project phases in cooperation with the Village of Telkwa Director of Finance. Items required during the performance of the Work include the following, at a minimum:

- The Consultant shall manage the project schedule, resources and budget very closely through all phases of this Work. To facilitate Project Management, the Consultant shall identify specific milestones, generate action plans, set completion dates of the various milestones, track the progress of each task and indicate how budget control is to be exercised.
- Deliverable: The Consultant shall provide written reports to the Village monthly summarizing the progress to date in comparison to the baseline schedule, project constraints, delivery dates, outstanding items, project budget, and any corrective actions that will be implemented to maintain the approved schedule.

## 5.4 COMMUNICATIONS

Project communications will be a key component in the success of the complete project and will carry through all project phases. At minimum, the Village expects the following:

- Meet with the Village Director of Finance and other staff as required in a timely manner to review project objectives and to gather information at project milestones.
- Meet with Village of Telkwa staff at key milestones in all stages of the project.
- Keep detailed records of all communications, meet with the stakeholders to discuss project updates and technical information.
- Deliverable: The Consultant shall provide written notes of all progress meetings and distribute to all in attendance within 48 hours of the meeting. These notes shall clearly show the actions that are assigned for all individuals.
- All teleconference calls or virtual meetings, if required, shall be hosted by the Consultant.



Other communication activity details anticipated for a successful project outcome are to be included in the Proposal.

## 6. REPORTING REQUIREMENTS

Before the conclusion of the project all documents, including but not limited to memos, reports, photographs, video, manuals, spreadsheets, Project Management information and tracking, assessments and other documents created for the purpose of this project, will be provided on a memory stick to the Village. Some specific reporting requirements are detailed in the following sections.

### 6.1 DOCUMENTS

Monthly written status updates to the Village Director of Finance will be required throughout the entire project through email or memo. At critical points in the project, the updates may be required weekly.

All finalized reports must be submitted in two hard copies as well as provided electronically. Draft reports can be reviewed electronically and do not require hard copies.

### 6.2 INVOICING

Detailed monthly invoices are required to itemize what work was completed on each phase of the project and by whom.

Any costs incurred by the Consultant above the specified maximum or upset fee will be the sole responsibility of the Consultant unless pre-approved by the Village.



## APPENDIX A - REQUEST FOR PROPOSALS EVALUATION FORM

| Proponent's Name: _____  |  |                  |        |
|--|--|------------------|--------|
| Project Title: Village of Telkwa Asset Management Policy, Risk Assessment & Lifecycle Planning Project |  |                  |        |
| Evaluation Date: _____   |  |                  |        |
| Evaluator: _____   |  |                  |        |
| Step 1:  |  | YES              | NO     |
| Mandatories  | Proposal received prior to closing                   |                  |        |
|  | Project Manager identified                           |                  |        |
|  | Proposed schedule included                           |                  |        |
|  | Subconsultant list submitted                         |                  |        |
|  | Reference list                                       |                  |        |
|  | Project costs provided                               |                  |        |
|  | Maximum or upset fee included                        |                  |        |
|  | Complete Proposal as requested                       |                  |        |
| Step 2:  |  | Available Points | Points |
| Proponent<br>(Max 40 points)   | Qualifications of firm and availability              | 10               |        |
|  | Relevant experience of firm and project team members | 10               |        |
|  | Past Performance / References                        | 10               |        |
|  | Resources  | 10               |        |
| Proposal<br>(Max 45 points)  | Scope  | 5                |        |
|  | Methodology  | 10               |        |
|  | Proximity  | 10               |        |
|  | Scheduling   | 10               |        |
|  | Project Team - Level of Effort                       | 5                |        |
|  | Clarity of Proposal                                  | 5                |        |
| Price<br>(Max 15 points)   | Total Price  | 15               |        |
| Total Score  | Proponent + Proposal + Price Scores                  | 100              |        |



### **Proponent Evaluation**

(i) Qualifications of Firm and Project Team Members

Are the firm and project team members specialized and qualified in the nature of the project work?

(ii) Experience of Firm and Project Team Members

Has the firm completed similar projects during the last three years? Do the assigned project team members have experience with similar projects?

(iii) Past Performance

Is the firm's record of past performance sound? Do reference checks reveal weaknesses? Was abnormal level of monitoring required? Does the firm consistently complete assignments on time and within budget?

(iv) Resources

Does the firm have ample resources (e.g. staff, equipment, etc.) to apply to this project?

### **Proposal Evaluation**

(i) Scope

Do the objectives, scope, work plan, and prediction of results comply with the Terms of Reference and project objectives?

(ii) Methodology

Is the methodology clear and in sufficient detail to cover all necessary aspects? Does the Proposal reflect the required understanding of the project? Is each task clearly outlined and in logical sequence?

(iii) Proximity

What is the Proponent's proximity to the project location? Are there qualified members of the project team that are able to visit Telkwa quickly in the event that an issue arises during the project? If additional travel restrictions are put in place due to the COVID-19 pandemic, will the project be affected?

(iv) Scheduling

Does the Proposal indicate that the achievement of objectives will be met according to an acceptable schedule? Are they within the timelines set by the Terms of Reference? Are problems or delays accounted for? Is timing realistic for the project?

(v) Project Team

Is the level of effort (total hours) adequate, low or high? Are the hours of professionals involved adequate, low or high? Is the proportion of professional vs. technical hours adequate or appropriate?

(vi) Clarity of Proposal

Is the Proposal clear, concise, and logical?

### **Price Evaluation**

The lowest cost Proposal will be awarded the maximum points, with others awarded points based on % difference from lowest cost Proposal.

Upon completion of Step 2, the Evaluation Team shall determine, by consensus, the score for each Proposal and will forward these scores to the Committee for its consideration to select the successful Proponent.