



Request for Proposals

Engineering Services for Hampshire Road Water Main Replacement

RFP No. OBMH 06-2021

**CLOSING DATE: May 14th, 2021
CLOSING TIME: 2:00 PM**

THE CORPORATION OF THE DISTRICT OF OAK BAY
2167 OAK BAY AVENUE
VICTORIA, BC V8R 1G2

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Attached Maps:

Hampshire Road Site Maps from Oak Bay Ave. to Lafayette Street.

Additional Information:

Kerr Wood Leidal (KWL) Water Supply Master Plan 2019 – attached separately.

1. Instructions to Proponents

1.1 Invitation

The District of Oak Bay (District) invites detailed proposals from qualified engineering consultants (the "Proponents") in accordance with these Proposal Documents (RFP No. OBMH 06-2021) for services to design for the replacement of approximately 1,400 metres of 300 mm diameter cast iron (CI) water main on Hampshire Road. This project is planned to be designed in 2021 with phases of construction between 2022 and 2024. The proposals will be evaluated for the selection of consultants with the desire to enter into a contract (the "Contract") to provide the services described in Appendix A - Scope of Work.

1.2 Closing Time and Date for Submission of Proposals

NOTE: Proposals will be accepted in electronic format only.

The proponent will submit a PDF copy a proposal, in accordance with the instructions contained herein, to the following email address:

purchasing@oakbay.ca

On or before the following date and time (the "Closing Time"):

Time: 2:00:00 pm (Local time)
Date: May 14th, 2021

The District reserves the right to extend the closing time at its sole discretion. Proposals must only be sent electronically. Hard copy proposals will not be accepted.

1.3 Not a Tender

This is a Request for Proposal and not a tender call.

1.4 Proposal Documents

Each Proponent will ensure it provides its correct name, address, email address, telephone number and facsimile number (if applicable) to the District.

Please use and reference the above RFP number on all correspondence. Proponents are advised to read and respond appropriately to all sections of the RFP. Incomplete proposals may be rejected at the sole discretion of the District.

1.5 Inquiries

All inquiries related to this RFP, including whether or not the Contract has been awarded, must be directed in writing to the contact person named below (the "District Representative"). Information obtained from any person or source other than the District Representative may not be relied upon.

Name: James Davison, ASCT.
Telephone: (250) 598-3311 Ext. 7422
E-mail: jdavison@oakbay.ca

Inquiries should be made no less than seven (7) days prior to Closing Time. The District reserves the right not to respond to inquiries made less than seven (7) days prior to Closing Time. Inquiries and responses will be recorded and may be distributed to all Proponents at the discretion of the District.

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 District Representative. If the District determines that an amendment is required to this RFP, the District Representative will issue a written addendum to the Proponents and post the addendum on BC Bid website. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.

1.6 Information Meeting

The District will **NOT** hold an information meeting regarding this Request for Proposal.

1.7 Addenda

If the District determines that an amendment is required to this RFP, the District will issue a written addendum to all Proponents of record that will be incorporated into and become a part of this RFP. The addenda will also be posted on BC Bid under the RFP. Failure to acknowledge and address all addenda in a Proposal may render the Proposal invalid.

1.8 Late Proposals

Proposals received after the Closing Time will not be accepted or considered. Delays caused by any delivery, courier or mail service(s) will not be grounds for an extension of the Closing Time. Proposals received after the Closing Time will be returned unopened to the Proponent.

1.9 Amendments to Proposals

Proposals may be revised by written amendment, provided they are delivered to the location set out in section 1.2 on or before the closing date and time. An amendment must be signed by an authorized signatory of the Proponent in the same manner as provided by section 2.3. Fax amendments are permitted provided they are received by the District's fax machine prior to the Closing Time, but such fax amendments may show only the change to the proposal price(s) and in no event disclose the actual proposal price(s). A Proponent bears all risk that the District's fax equipment functions properly so as to facilitate timely delivery of any fax amendment. All faxed amendments should be sent to the District fax number listed in section 1.2.

1.10 District's Right to Modify Terms and Negotiate

The District, at its sole discretion, reserves the right to modify the terms of the RFP at any time before the Closing Time. The District also reserves the right following the Closing Time, and in accordance with the terms of this RFP, to negotiate with one or more Preferred Proponents any modification or variation of the terms of the RFP, including any of the documents referred to in the definition of "Contract" herein or any modification or variation of the terms of any Proposal, including price, that the District considers to be in its best interests. For certainty and without limiting the foregoing, the District may, for the purpose of entering into a Contract with any Proponent, amend the description of the required work included in this RFP so that it accurately reflects the services to be provided by the Proponent.

1.11 Examination of Contract Documents and Site

Each Proponent will be deemed to have carefully examined and understood the requirements and limitations of the RFP, including all attached Appendices, the Contract and the Site (as applicable) prior to preparing and submitting a Proposal, with respect to any and all facts which may influence the decision to prepare and submit a Proposal.

2. Proposal Submission Form and Contents

2.1 Electronic submission only

Submit a PDF copy of your Technical Proposal and Financial Proposal (in two separate files), in accordance with the instructions contained herein, to the following specific email address:

purchasing@oakbay.ca

The Technical Proposal file must include any submittal forms that are required as part of the submission. i.e.: references.

The Financial Proposal file must include only the financial proposal and any insurance or bonding documents required.

The maximum file size accepted will be 20MB. It is the responsibility of the proponent to ensure the email submitted is within the maximum file size limit. Zip files will be accepted.

Delays caused by any computer related issues will not be grounds for an extension of the Closing Time. The District cannot be held responsible in any way for lost, misdirected, illegible or obscured emails. It is the sole responsibility of the submitting party to confirm a clear receipt of the transmission to the correct email address.

Proposals received electronically at the email address above with a time stamp after the Closing Time will be returned unopened to the Proponent.

It is recommended that the Proponent request an email from **purchasing@oakbay.ca** to verify that their proposal has been received.

2.2 Form of Proposal

Proponents must submit their Proposal in accordance with the instructions set out in Appendix "B" - Form of Proposal.

2.3 Signature

The Proposal must be signed by a person authorized to sign on behalf of the Proponent.

3. Evaluation and Selection

3.1 Evaluation Team

The evaluation of Proposals will be undertaken on behalf of the District by the Evaluation Team. The Evaluation Team may consult with others including District staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required.

3.2 Evaluation Criteria

The Evaluation Team will compare and evaluate each Proposal to determine the Proponent's strength and ability to provide the Services in order to determine the Proposal which is most advantageous to the District, using the following general criteria:

- (a) Understanding of issues specific to this assignment including proposed work.

- methodology, proposed level of effort, proposed work schedule and sequence of work.
- (b) Experience and capability of firms and staff in similar assignments.
 - (c) Past performance of firm and staff as determined from the District and references and demonstrated ability to work cooperatively and collaboratively with the District (or similar municipal client).
 - (d) Availability and commitment of resources including staff, office and technical support.
 - (e) Past performance of cost and scheduling control practice.
 - (f) Fee schedule and total cost of services (upset fee) to the District.

Specific criteria and their importance are outlined in Appendix "C".

3.3 Litigation

In addition to any other provision of this RFP, the District may, in its absolute discretion, reject a Proposal if the Proponent, or any officer or director of the Proponent submitting the Proposal, is or has been engaged directly or indirectly in a legal action against the District, its elected or appointed officers, representatives or employees in relation to any matter.

In determining whether or not to reject a Proposal under this section, the District will consider whether the litigation is likely to affect the Proponent's ability to work with the District, its contractors and representatives and whether the District's experience with the Proponent indicates that there is a risk the District will incur increased staff and legal costs in the administration of the Contract if it is awarded to the Proponent.

3.4 Additional Information

The Evaluation Team may, at its discretion, request clarifications or additional information from any Proponent with respect to any Proposal. The Evaluation Team may consider such clarifications or additional information in evaluating a Proposal.

3.5 Interviews

The Evaluation Team may, at its discretion, invite some or all of the Proponents to appear before the Evaluation Team to provide clarifications of their Proposals. In such event, the Evaluation Team will be entitled to consider the answers received in evaluating Proposals.

3.6 Multiple Preferred Proposals

The District reserves the right and discretion to divide up the Services, either by scope, geographic area, or on any other basis as the District may decide, and to select one or more Preferred Proponents to enter into discussions and / or negotiations with the District for one or more Contracts to perform all or a portion or portions of the Services. In addition to any other provision of this RFP, Proposals may be evaluated on the basis of advantages and disadvantages to the District that might result or be achieved from the District dividing up the Services and entering into one or more Contracts with one or more Proponents.

3.7 Negotiation of Contract and Award

If the District selects one or more Preferred Proponents, then it may enter into a Contract with the

Preferred Proponent(s), or enter into discussions with the Preferred Proponent(s) to attempt to negotiate the terms of the Contract(s), and such discussions may include but are not limited to negotiating amendments to the scope of Services and the Preferred Proponent's price(s).

If at any time the District reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached within thirty days, the District may, at its discretion at any time thereafter, terminate negotiations with the preferred proponent and either enter into negotiations with any qualified Proponent or cancel the RFP process in its entirety.

3.8 Acceptance of Proposals

Proposals submitted must remain open for acceptance by the district for a minimum of sixty (60) calendar days after the submission after the Submission Closing Time and Date.

Proponents will be notified in writing when a Contract has been awarded.

4. General Conditions Of Request for Proposal

4.1 No District Obligation

This RFP does not commit the District in any way to select a Preferred Proponent, or to proceed to discussions or negotiations for a Contract, or to award any Contract, and the District reserves the complete right to at any time reject all Proposals, and to terminate this RFP process for any reason.

4.2 Proponents Expenses

Proponents are solely responsible for their own expenses in preparing, submitting Proposals, and for any meetings, negotiations or discussions with the District or its representatives and contractors relating to or arising from this RFP.

4.3 No Contract

By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFP, prior to the signing of a formal written Contract.

4.4 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 District, its elected or appointed officials or employees. The District may rely upon such disclosure.

4.5 Solicitation of District Staff, Council Members, Contractors

Proponents and their agents will not contact any member of the District Council, District staff or District contractors with respect to this RFP, other than the District Representative named in section 1.5, at any time prior to entering into a Contract or the cancellation of this RFP.

4.6 Disclaimers/Limitations of Liability

Neither acceptance of a Proposal nor execution of a Contract constitute approval of any activity or development contemplated in any Proposal that requires any approval, permit or license pursuant to any federal, provincial, regional or municipal statute, regulation or bylaw. It is the responsibility of the Proponent to obtain such approval, permit or license prior to commencement of the work under the anticipated Contract.

The District, its elected officials, appointed officers, employees, agents, contractors and volunteers expressly disclaim any and all liability for representations or warranties expressed, implied or contained in, or for omissions from this RFP package or any written or oral information transmitted or made available at any time to a Proponent by or on behalf of the District. Nothing in this RFP is intended to relieve a Proponent from forming its own opinions and conclusions in respect of this RFP.

The District, its elected officials, appointed officers, employees, agents, contractors and volunteers will not be liable to any Proponent for any claims, whether for costs, expenses, losses, damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by a Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP. By submitting a Proposal, each Proponent shall be deemed to have agreed that it has no right to make such claims.

4.7 Confidentiality

The RFP documents, or any portion thereof and any other confidential information to which a Proponent may have access as a result of this RFP process, may not be used by a Proponent for any purpose other than submission of Proposals.

By submitting a Proposal, every Proponent agrees not to divulge, release or otherwise use any information that has been given to it or acquired by it from the District on a confidential basis as a result of or during the course of the RFP process.

4.8 Ownership of Proposals and Freedom of Information

Each Proposal submitted, as well as any other documents received from a Proponent, become the property of the District, and as such are subject to the *Freedom of Information and Protection of Privacy Act* ("FOIPPA"). FOIPPA grants a general right of access to such records, but also includes grounds for refusing the disclosure of certain information.

Proponents are asked to specifically identify information contained in their Proposal that is submitted on a confidential basis. Subject to any requirement for access under FOIPPA, the District will hold in confidence any such information received from a Proponent. However, the District specifically reserves the right to distribute information about any Proposal internally to its own directors, officers and employees, to its consultants and contractors where the distribution of that information is considered by the District to be necessary to its internal consultation process.

4.9 Local Time

The timing for the submission and receipt of Proposals and any amendments thereto shall be determined by reference to the District local area network time.

4.10 Acceptance of Terms

The submission of a Proposal constitutes the agreement of the Proponent that all the terms and conditions of this RFP are accepted by the Proponent and incorporated in its Proposal.

APPENDIX A - SCOPE OF WORK

The District of Oak Bay (the District) is seeking the services of a qualified engineering consultant for the design of approximately 1,400 metres of 300 mm CI water main. This project is to be designed in 2021 and constructed in phases between 2022 and 2024 by the District's Public Works forces. The project will also include the review of background data, water models, and reports to confirm the main is sized appropriately. A topographical survey of the site will be supplied by the District. The consultant will prepare a base plan and ultimately produce a stand-alone set of issued for construction drawings for each phase of work. The consultant will also perform site inspections during construction compete with observation reports and photos, and will produce sealed record drawings for the District's files.

The project description and scope of services for each phase of the project are outlined below. A site map is attached, outlining the site locations.

Phase 1 - Central Avenue to Lafayette Street

The existing 300 mm Cast Iron (CI) water main on Hampshire Road between Central Avenue and Lafayette Street was constructed in 1948. The main is located along the west side of the road behind the curb line in the grass boulevard. Parallel to the 300 mm water main in the Southbound lane of the road is an older 100 mm CI water main. Records indicate the 100 mm main is connected to the 300 mm main at Lafayette Street with a 25 mm pipe for circulation purposes. Due to a history of breaks in the 300 mm main and the redundancy of the 100 mm main, the District plans to replace both mains with a single pipe system complete with new services, hydrants, and other appurtenances that will improve the system for domestic use and fire flow purposes.

In addition, in 2019 the District competed a Water Master Plan with Kerr Wood Leidal. The plan recommended a project (ID 27) to loop the 300 mm water main on Lafayette Street from Hampshire Road to Monterey Avenue. This project was recommended to improve fire flows in the area.

Phase 2 & 3 - Central Avenue to Oak Bay Avenue

The existing 300 mm CI main continues from Central Avenue to Oak Bay Avenue in the south-bound lane of Hampshire Road. Parallel to the 300 mm main is a 150 mm CI main. As is the case with Phase 1, the District plans to replace both mains with a single pipe system complete with new services, hydrants, and other appurtenances that will improve the system for domestic use and fire flow purposes. Limits of phasing will be determined later by the District during the design process.

Scope of Services

The District is looking for an engineering consulting team with suitable, relevant, and recent experience in utility capital projects replacing water main systems. The scope for this project consists of the following work:

General Design Requirements

- Conduct a project start-up meeting, design milestone meetings (50%,90%,100%), and any other necessary meetings to ensure effective communication between the project team and stakeholders. The consultant is responsible for preparing meeting agendas and taking and distributing minutes.
- All water mains and their appurtenances shall be designed per the Master Municipal Construction Documents (MMCD) Association's standards and guidelines and sound engineering knowledge.
- All plan/profile engineering design drawings shall be prepared using AutoCAD Civil 3D. All electronic submissions (50%, 90%, and Issued for Construction/100%) should be provided in

PDF and DWG formats. The DWG should be a single, fully useable drawing, retaining all civil 3D objects, including points, surfaces, alignments, and pipe networks (not exploded or blocked), with all references included and bound to the drawing.

- The consultant must deliver all digital files through a secure file transfer system that conforms to BC privacy laws. File accessibility should not have additional software, plugins, or windows administrative requirements.

Pre-Engineering Design

- Contact BC One-Call for reference drawings identifying existing infrastructure locations such as gas lines, overhead power poles, sewer laterals, and other public or private infrastructure.
- The designs shall be per the Master Municipal Construction Documents (MMCD) Association's standards and guidelines and sound engineering judgement.
- Review record drawings, right-of-way-documentation, and any other background data or reports provided by the District.
- Incorporate the topographical survey within the project area supplied by the District to complete the design. Additional survey or utility locates will be provided by the District, if required.
- Conduct site visits to identify any gaps in the available information required to complete the design.
- All water services are to be replaced to the meters.
- Provide the District with options to reduce project costs, provide the best value for dollars spent, and identify any concerns or issues that should be addressed.

Preliminary Design

- Determine any potential conflicts between the proposed pipe alignment and existing utilities that require further field investigations before completion of the preliminary design. Provide the District with proposed test-pit locations. The District crews will provide test pitting and necessary survey pick-up data.
- Prepare preliminary engineering designs for the proposed water main replacement to the 50% design phase. Provide plan/profile of proposed pipe connections to existing mains at intersections or other lateral locations. Show the proposed connections.
- Submit three (3) sets of printed, sealed full-size preliminary engineering design (50% design) drawings along with all electronic submissions.
- Submit Class C cost estimate.

Detailed Design

- Prepare detailed engineering designs for the proposed water main replacement to the 90% design phase. The 90% submission shall show all proposed works' final locations, with all notes and details as required, showing a full understanding of the entire design. The 90% design drawings should be to a level such that the project would only require minor adjustments and revisions before issuing for construction or tender.
- Submit three (3) sets of printed, sealed full-size engineering design (90% design) drawings along with all electronic submissions.
- Coordinate relevant permits and approvals for each project as required from utility companies, provincial agencies and any other organizations having jurisdiction, such as the Vancouver Island Health Authority (VIHA).
- Submit Class B cost estimate.
- Upon final review of 90% sets, submit three (3) sets of the independent Issued for Construction (IFC) drawings with complete technical specifications.

- Prepare and provide AutoCAD survey control data suitable for construction layout.

Construction Services – Optional Work

This work will not form part of the contract for design services, however it will form part of the technical evaluation. Bidders are to include details of the personnel who will be nominated as site inspector during construction and their hourly rate for 2022, 2023, and 2024. Where these rates are not known, an anticipated percentage increase over 2021 fee rates is acceptable.

The evaluation committee will consider the completeness of the submission relative to the proposed team described in the proposal and the Proponent's hourly rates in comparison to all the submissions in the competition.

- Perform site inspections and provide observation reports during construction.
- The personnel assigned is expected to be on-site an average of 15 hours per week. Inspection services include but are not limited to:
 - Attend the pre-construction meeting and ongoing construction meetings where the quality of work will be discussed or changes to the work will be discussed.
 - Complete field reviews and periodic site inspections to assure that the works constructed substantially comply in all material respects with the design and construction standards and whether the design itself is in conformance with the project standards.
 - Provide a weekly written report of observations and deficiencies and the standards which apply to the rectification of the deficiencies.
 - Review proposed design changes required from unexpected or changed conditions on-site.
 - Maintain a mark-up set of drawings recording changes to the design.

Closeout – Optional Work

This work will not form part of the contract for design services, however it will form part of the technical evaluation.

- Review mark-up drawings to ensure accuracy.
- Complete a record drawing package.
- Prepare and submit three (3) sets of printed, sealed full-size record drawings to the District in PDF and DWG formats.

Materials / Services Provided by The District

All available record drawings showing District-owned utilities within the project areas.

Topographic Survey prepared by GeoVerra Inc. (2021) of Hampshire Road. Information will include an AutoCAD drawing and points file. Survey information prepared in NAD83 UTM coordinates.

Water Supply Master Plan (2019), prepared by Kerr Wood Leidal (KWL). Attached separately.

All information is provided as reference material only. The Consultant's responsibility is to confirm the completeness and accuracy of all required information through site investigation, testing, calculation, etc.

Project Timelines

The following is the project's anticipated timeline to be ready for construction in 2022.

- | | |
|------------------------------------|-----------------|
| ▪ RFP Deadline | May 14th, 2021 |
| ▪ Anticipated Contract Award | May 21st, 2021 |
| ▪ Kick Off Meeting | May 27th, 2021 |
| ▪ 50% Submission with Class C Est. | June 28th, 2021 |
| ▪ 90% Submission with Class B Est. | July 26th, 2021 |
| ▪ IFC Submissions | August 9, 2021 |
| ▪ Construction Services | TBD |

Please allow 2 weeks between each submission for District comments.

It is anticipated, that at a minimum, meetings will occur between the selected Consultant and District staff at the following milestone dates.

- Project Start-Up
- 50% Design Submission
- 90% Design Submission
- 100% Design, or 'Issued for Construction' Submission

Other meetings may include coordination meetings between third-party utilities, regulatory authorities, Land Owners and other stakeholders. The Consultant will be expected to take and distribute minutes of all meetings.

Proponents shall submit a schedule of key tasks and milestones with dates and sufficient detail for the Evaluation Team to assess the Proponent's reasonable ability to achieve the results in the time stated.

Deliverables

Deliverables required at milestones of the project include, but are not limited to:

- Kick-off meeting agenda, minutes, and site visit.
- Submission of 50% drawings (PDF format) and Class C estimate.
- 50% review meeting.
- Submission of 90% drawings (PDF format) and Class B estimate.
- 90% review meeting.
- Submission of sealed IFC drawings for final review.
- Schedule of Quantities for each project/phase.
- Record Drawings certified by the Engineer of Record.
- All construction reports, inspections, and construction photos.

APPENDIX B – FORM OF PROPOSAL

Evaluation of Proposals will be by a committee formed by the District and will include employees of the District. All evaluators will be bound by the same standards of confidentiality. The District's intent is to enter into a Contract with the Proponent who has submitted the best offer.

Proponents should ensure that they fully respond to all criteria in their submission in order to receive full consideration during the evaluation process.

Stage One – Mandatory Criteria

Item #	Mandatory Criteria
1	The Proposal must be received by e-mail to Purchasing before the Closing Date and Time specified in Section 1.1- Invitation. Late Proposals will not be considered and will be returned unopened to the Proponent. Emailed and/or faxed Proposals will not be accepted.

Proposals not meeting all the mandatory criteria will be excluded from further consideration during the evaluation process.

Stage Two – Technical and Financial Evaluation

After passing the mandatory criteria screening, proposals will enter Stage Two, which includes the review of the Technical and Financial submissions. Proposals will be evaluated for completeness, team experience, project history, project fee, and confirmation of the deliverable schedule. Information that should be included by proponents in their submission is discussed below.

No assumptions should be made that information regarding the proponent or its participants, their experience, and performance on other projects is known, other than the documentation and information contained in the proposal.

Company Profile and Relevant Experience (2 pages max)

Proponents should provide a brief company profile as background and context for their capacity to provide the services described in this RFP. The company profile should include:

- Year and jurisdiction of incorporation;
- Office location servicing this contract and the number of employees.
- Experience providing the required services (to Oak Bay and other Local Governments).
- The name and company information of any subcontractors that will be used in the fulfillment of the contract

Project Team Experience and Qualifications (4 pages max – excluding resumes)

Proponents are to describe their proposed team's ability to provide the services and scope of work defined in Appendix A – Scope of Work.

- Identify project team, years of experience, certifications & qualifications.
- Identify the primary contact person who will be responsible for managing the contract.
- Clearly outline the role of each team member, their availability and level of utilization on this project, and discuss their previous working relationships with each other.
- Provide resumes of the individuals noted (two-page max for each key person)

Project Understanding, Approach and Methodology (4 pages max)

- Outline the understanding for each project and how the design will be approached.
- Identify ways to reduce project costs, simplify construction, or employ sustainability principles where appropriate.
- Provide a timeline or Work-plan showing key deliverable dates and when quality checks will be completed.

Project Management and Quality Management (2 pages max)

- Describe how the project and the consultant team will be managed.
- Describe any change management protocols in place with the proponent.
- Outline the quality management and peer review process and procedures that will be followed and who will be responsible for quality assurance.

Fee Proposal

- Proponents should provide a fixed fee proposal, preferably in an Excel styled spreadsheet that includes a detailed explanation of the makeup of the total cost for each project in each proposed phase as outlined below.
- This should include a breakdown of project tasks, personnel responsible, number of hours, the total number of staff hours, hourly rates, and total costs for each phase and each project. As applicable, list any expected expenses, disbursements or other probable costs that will be included in the fixed fee.

Fee Structure

- Phase 1 – Design Services (Drawing packages for each phase – one design)
- Phase 2 – Construction Services (Optional Work).
- Phase 3 – Close-Out, Record Drawings (Optional Work).

Also, submit a list of hourly rates should additional services be required.

Proposals will be assigned points based on their relationship to the lowest price proposed, as per the Evaluation Procedures. Proponents should provide their pricing as per Pricing Submittal Form "A" and return with the response in a separate sealed envelope clearly marked "Financial Proposal."

References & Experience

- Using the References Form, Submittal Form B, provide a minimum of three client (3) references for similar projects, including the start and end dates of when the services were provided.
- Reference must be for projects completed by the team named on the proposal.

The District will be checking references to better understand the approach to design services and how the design team collaborated with the Owner to reduce costs and project risks where possible, to confirm the experience of listed team members, and how the project team contributed to a successful outcome with limited changes during construction.

Value-Added Services

Proponents are to provide information on what makes your firm innovative, what is your competitive advantage and what other services and value-added your firm provides that would assist or be of benefit to the District for these specific projects.

Proponents should submit all relevant documentation as it relates to any product(s) proposed in order to facilitate a complete and comprehensive evaluation by the District.

Stage Three - Reference Checks

The references of the preferred Proponent may be contacted to validate any part of the Proposal. The District reserves the right to conduct reference checks to verify the information contained in the Proposal and confirm suitability of the Proponent. Past working history with the District will be considered in the evaluation of any proponent.

The District will not enter into a Contract with any Proponent whose references, in the District's sole opinion, are found to be unsatisfactory.

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 internet or from other public sources cannot be considered during the evaluation process.

APPENDIX C – EVALUATION PROCEDURES

Evaluation will be based upon the following:

<i>Item</i>	<i>Evaluation Criteria</i>	<i>Point Value</i>
1.	<i>Company Profile and Relevant Experience</i>	10
2.	<i>Project Team Experience and Qualifications</i>	20
3.	<i>Project Understanding, Approach and Methodology</i>	20
4.	<i>Project Management and Quality Assurance</i>	15
5.	<i>Proposed Fee</i>	35
	TOTAL	100

Evaluation and Scoring Procedure

Technical merit is awarded a maximum score of 65 points and cost is awarded a maximum of 35 points each, for a total potential of 100 evaluation points. Technical proposals will be opened and marked out of a total score of 65 points against the evaluation grid before any financial proposals are opened. Each technical presentation will be evaluated on the basis of the model proposed, the firm's experience, competence of its personnel and acceptability of the method proposed.

A firm's technical proposal shall be deemed qualified only if it complies with all requirements contained in the Request for Proposal.

Only proposals whose technical scores are within 15% of the proposal awarded the highest technical score will have their financial proposals opened and evaluated. All other financial proposals will be returned unopened upon appointment of the selected firm. The only exception to this policy is when the proposal of the second-ranked firm is more than 15% below the highest technical score and still technically qualified. In such a case, the second-ranked firm would have its financial proposal opened to avoid a non-competitive situation.

In all cases, the District reserves the right to cancel the competition and call for new proposals.

Financial proposals can be awarded a maximum of 35 points. The financial proposal with the lowest cost of fees will be awarded 35 points, which will be added to the technical score, resulting in the firm's total score. The percentage by which each of the remaining firms' proposed costs exceeds the cost of the lowest qualified proposal will be the percentage by which the 35 points is reduced, prior to adding it to the technical score resulting in each firm's total score.

For example, if the proposed cost of Firm A exceeds the lowest proposed cost (Firm B) by 10%, Firm A will add 35 minus 3.5 (10% of 35), or 31.5 points to its technical score. The firm receiving the highest total score will be judged to have the best value to the District.

COSTS INCLUDED IN PROPOSAL EVALUATION

All personnel fees, salaries, wages and reimbursable expenses will be taken into account in the proposal evaluation.

DEBRIEFING

Subsequent to final selection of a firm for contract award, all other proposing firms have the right to receive a debriefing on the strengths and weaknesses of their proposal. Points awarded by evaluation teams for both technical and financial proposals will remain confidential and may not be divulged to any proposing firm.

Minimum Technical Score

Technical proposals must achieve a score of at least 45.5 points (70%) to be considered "technically qualified". Financial proposals for firms failing to achieve the minimum technical score will not be opened.

APPENDIX D – PRO FORMA CONTRACT FOR SERVICES

This AGREEMENT dated for reference and made as of the (date)

BETWEEN:

THE DISTRICT OF OAK BAY

2167 Oak Bay Avenue

Victoria, BC V8R 1G2

Fax No. 250-598-9108

(‘The District’, ‘we’, ‘us’ or ‘our’ as applicable)

OF THE FIRST PART

AND:

CONSULTANT’S NAME

ADDRESS

EMAIL

(‘Contractor’, ‘you’ or ‘your’ as applicable)

OF THE SECOND PART

WHEREAS:

- A. The District called for proposals for the provision of consulting services for (Contract No.) (the "Project"), and the Contractor in reply submitted a proposal dated (Date). A copy of the call for proposals is attached as Schedule "C" to this Agreement, and a copy of the Contractor's proposal is attached as Schedules "D" and "E" to this Agreement.
- B. The District has agreed to engage the Contractor and the Contractor has agreed to provide the services described in Schedule 'A' to this Agreement (the "Services") to the District in respect of the Project on the terms and conditions set out in this Agreement.

NOW THEREFORE the District and the Contractor, in consideration of their mutual duties and responsibilities to one another under this agreement (the "Agreement"), agree as follows:

CONTRACTOR’S OBLIGATIONS:

1. **Standard of Care** You must provide the Services with the degree of care, skill and diligence normally provided by consultants having similar qualifications in the performance of duties of a nature similar to the Services, and you must provide the Services within the time limits specified in Schedule "A" or, if no time limit is specified in Schedule "A", you must provide the Services promptly.
2. **Billable Charges** You must charge only those fees and disbursements specifically authorized for the Services in Schedule "A" to this Agreement. All other costs and expenses incurred by you to provide the Services, including labour, materials, permits, and licenses, must be paid by you.
3. **Confidentiality** You must not disclose any information, data or secret of the District to any person other than representatives of the District duly designated for that purpose in writing by us and you must not use for your own purposes or for any purpose other than those of the District any information, data or secret you may acquire as a result of being engaged pursuant to this Agreement.

4. **Conflict of Interest** You must not, during the term of this Agreement, perform a service for, or provide advice to any person, firm or corporation, which in our reasonable opinion gives rise to a conflict of interest between your obligations under this Agreement and your obligations to such other person, firm or corporation.
5. **Ownership of Materials** All plans, specifications, manuals, preliminary drafts, sketches, copies, designs, computer modules, software programs, technology, data and information and all other materials produced by you under this Agreement (collectively, the "**Intellectual Property**") are and will remain our property even though you or another party has physical possession of them. You hereby waive in our favour any moral rights you, your employees, sub-consultants or sub-contractors may have in the Intellectual Property. Until the expiry or earlier termination of this Agreement, you may retain copies, including reproducible copies of the Intellectual Property. You must not use the Intellectual Property on other projects or for other clients except with written consent from us. You must obtain our consent before you publish or make public any of the Intellectual Property in book, periodical, electronic or any other form.
6. **Retention of Intellectual Property on Termination** Upon expiry or earlier termination of this Agreement, you must turn over to us all Intellectual Property, keeping a single copy for your own archival purposes.
7. **Severability** It is understood and agreed that the covenants and agreements contained in paragraphs 3, 4, 5, 6 and 8 shall survive the expiry or earlier termination of this Agreement and that those paragraphs are severable for such purpose.
8. **Indemnification** You must indemnify and save harmless us and our elected officials, appointed officers, employees, agents and contractors from and against any claims, costs, losses, damages, actions, causes of action and expenses arising, from an error, omission or negligent or willful act of you or your agents, employees, sub-consultants or sub-contractors, or from your breach of this Agreement.
9. **Insurance** You must provide and maintain at your expense any insurance that you are required to provide by law, or that is reasonably necessary to insure against any risks you may assume as a result of entering into this Agreement, including coverage for your employees as required by the *Workers Compensation Act*. Without limiting the foregoing, you must provide and maintain at your expense any insurance specifically required in Schedule "B" to this Agreement. You must provide satisfactory proof of insurance coverage to us upon request.
10. **Compliance with Laws** You must comply with all laws applicable to the provision of the Services.
11. **Assignment** You must not assign, subcontract, or transfer any interest in your rights under this Agreement without our prior written consent.
12. **Legal Relationship** The legal relationship between you and the District arising pursuant to this Agreement is that of an independent contractor and a purchaser of services. Nothing in this Agreement shall be interpreted so as to render us your employer or partner, or the employer of anyone working for you, and you must not do anything that would result in anyone working for you being considered our employee.
13. **Agent** You are not, and must not claim to be our agent for any purpose unless we give you authorization in writing to act as our agent for specific purposes that are reasonably necessary to your rendering of Services pursuant to this Agreement.

PAYMENT

14. **Payment for Services** We must pay you the fees for your Services at the times set out in Schedule "A". Where you are specifically authorized in Schedule "A" to charge us for

disbursements, we must pay such disbursements to you in accordance with Schedule "A" as long as they are reasonably necessary for the performance of the Services and supported by conclusive documentation, including receipts. Payment will be issued no more than 30 days after receipt of your invoice, in accordance with our accounts payable policies.

15. Currency Unless stated otherwise in this Agreement, all sums of money are in Canadian dollars.

TERMINATION AND SUSPENSION

16. For Default If you are in default of your obligations under this Agreement, and you have not corrected the default within thirty (30) days following written notice from us, or if the default reasonably requires more time to correct, and you are not taking active steps to correct the default within thirty (30) days following written notice from us, or if you become insolvent or are assigned into bankruptcy, we may immediately terminate this Agreement. Termination will be without prejudice to any other rights or remedies we may have.

17. For Absence If for any reason you are unable to provide the Services using the individuals or subcontractors named in your proposal and set forth in this Agreement for reasons other than reasonable annual vacation time or short term temporary absence because of illness, we may, following written notice and without limiting any other right we may have, immediately terminate this Agreement and shall pay you for the Services performed and disbursements incurred by you to the date of termination, less any amounts necessary to compensate us for damages or costs incurred by us arising from your default.

18. Suspension If your Services are suspended by the District at any time for more than thirty (30) days through no fault of yours, then you shall have the right at any time until such suspension is lifted by the District to terminate this Agreement upon giving written notice thereof to the District. In such an event, you shall be paid by the District for all Services performed and disbursements incurred pursuant to this agreement and remaining unpaid as of the effective date of such suspension unless the parties otherwise agree in writing.

19. With Notice If we are unwilling or unable to proceed with the Project we may terminate this Agreement by giving you fifteen (15) days written notice. If you receive such notice, you must perform no further Services other than those reasonably necessary to close out the Services, and we will pay you the fees and authorized disbursements properly owing as of the effective date of termination.

GENERAL

20. Client to Provide Information We will make available to you all information in our possession which we consider pertinent to your performance of the Services. You may rely upon the accuracy and completeness of such information except where it is unreasonable to do so. However, you acknowledge that the District, in the preparation of the call for proposals and this Agreement, the supply of oral or written information to you, the review of proposals or the carrying out of the District's responsibilities under this Agreement, does not owe a duty of care to you and you hereby waive for yourself, your successors and assigns, the right to sue the District in tort for any loss, including economic loss, damage, cost or expense, arising from or connected with any error, omission or misrepresentation occurring in the preparation of this Agreement, the call for proposals, the supply of oral or written information to proponents, the review of proposals, or the carrying out of the District's responsibilities under this Agreement.

21. Client to Respond We will give prompt consideration to all draft reports, drawings, proposals and other documents relating to the Project provided to us by you, and, whenever prompt action is necessary, where possible inform you of a decision in such reasonable time so as not to delay your Services.

22. Site Access We will arrange and make provision for your entry and ready access to property (public and private) as well as to the Project site, as necessary, to enable you to perform the

Services. We will arrange a safety orientation for you and your employees, to identify the hazards of the site. Once we have provided such a safety orientation, you will be responsible for arranging any additional safety orientations necessary as a result of a change in your personnel or otherwise.

- 23. Jurisdiction** This Agreement is governed by and shall be construed in accordance with the laws in force from time to time in the Province of British Columbia.
- 24. Waiver** Except as may be specifically agreed in writing, no action or failure to act by the District or the Contractor shall constitute a waiver of any right or duty afforded either of them under this Agreement nor shall any such action or failure to act constitute an approval of or acquiescence in any breach of this Agreement.
- 25. Entire Agreement** This Agreement, including the schedules attached to it, constitutes the entire Agreement between the District and the Contractor and supersedes all previous expectations, understanding, communications, representations and agreements whether verbal or written between the District and the Consultant with respect to the subject matters hereof and may not be modified except by subsequent agreement in writing executed by the District and the Contractor.
- 26. Conflict** In the event of a conflict between a provision in this Agreement and a provision in a schedule attached to this Agreement, the provision in this Agreement shall prevail.
- 27. Invalidity** If any part of this Agreement is or is declared invalid by a court of competent jurisdiction, the remainder shall continue in full force and effect and be construed as if the Agreement had been executed without the invalid portion.
- 28. Designation of Parties** In this Agreement, "we", "us" and "our" refer to the District alone and never refer to the combination of the Contractor and District. The combination of the District and the Consultant is referred to as "the parties".
- 29. Headings** The captions or headings appearing in this Agreement are inserted for convenience of reference only and shall not affect the interpretation of it.
- 30. Interpretation** Whenever the singular or masculine is used in this Agreement, the same shall be deemed to include the plural or the feminine or the body politic or corporate where the context or the parties so require.
- 31. Time** is of the essence in this Agreement.
- 32. Enurement** This Agreement shall enure to the benefit of and be binding upon the parties hereto and their respective heirs, executors, administrators, personal representatives, successors and permitted assigns. Neither party may assign, subcontract or transfer an interest in the Agreement without the prior written consent of the other.

DISPUTE RESOLUTION

- 33. Arbitration** All matters in dispute under this Agreement which are not first resolved between the parties acting reasonably may, with the concurrence of both the District and the Contractor, be submitted to arbitration pursuant to the *Commercial Arbitration Act* (British Columbia) to a single arbitrator appointed jointly by them.
- 34. No Conflict of Interest** No one shall be nominated to act as an arbitrator who is in any way financially interested in the conduct of the Project or in the business affairs of either the District or the Contractor.
- 35. Nominees** If the parties cannot agree on the choice of an arbitrator, each party shall select a nominee and the nominees shall jointly appoint an arbitrator.

DESIGNATED REPRESENTATIVES

- 36. District Representative** We shall by notice in writing to you designate a representative to act on our behalf with respect to the performance of this Agreement (the "District Representative") and we may at any time or from time to time thereafter, by notice in writing to you, designate another person to act as the District Representative in the place and stead of any person previously designated.
- 37. Project Manager** You shall, by notice in writing to us, designate a representative to act on your behalf with respect to the performance of this Agreement (the "Project Manager") and you may at any time or from time to time thereafter, upon written approval from us, designate another person to act as the Project Manager in the place and stead of any person previously so designated.

NOTICE

- 38. Notice** Unless otherwise specified in this Agreement, any notice required to be given by either party shall be deemed to have been given if delivered by hand, mailed by prepaid registered mail or faxed to the address of the other party set forth on the first page of this Agreement or at such other address as the other party may from time to time direct in writing, and any such notice shall be deemed to have been received if mailed or faxed, 72 hours after the time of mailing or faxing and, if delivered by hand, upon the date of delivery. If normal mail service or facsimile service is interrupted by strike, force majeure or other cause beyond the control of the parties, then a notice sent by the impaired means of communication will not be deemed to be received until actually received, and the party sending the notice shall utilize any other means of communication which have not been so interrupted or shall deliver such notice by hand in order to ensure its prompt receipt.

IN WITNESS WHEREOF the parties have duly executed this Agreement as of the date first written above.

The District of Oak Bay by its authorized signatories:

(Name) by its authorized signatories:

SUBMITTAL FORM "A"

OBMH 06-2021

FINANCIAL PROPOSAL

Project / Phase	Total Hours	Total Fee	Expenses or Disbursements	Total Cost
Hampshire Water Main Replacement				
<i>Phase 1 Design Services</i>		\$	\$	\$
<i>Phase 2 Construction Services (Optional)</i>		\$	\$	\$
<i>Phase 3 Close-Out, Record Drawings (Optional)</i>		\$	\$	\$
		SUBTOTAL FEE		\$
			GST	\$
		TOTAL FEE		\$

Authorized Signatory for the Proponent

Legal Name of Company

Address

Phone

Dated this _____ day of _____, 2021

SUBMITTAL FORM "B"- REFERENCES

OBMH 06-2021

Hampshire Water Main Project

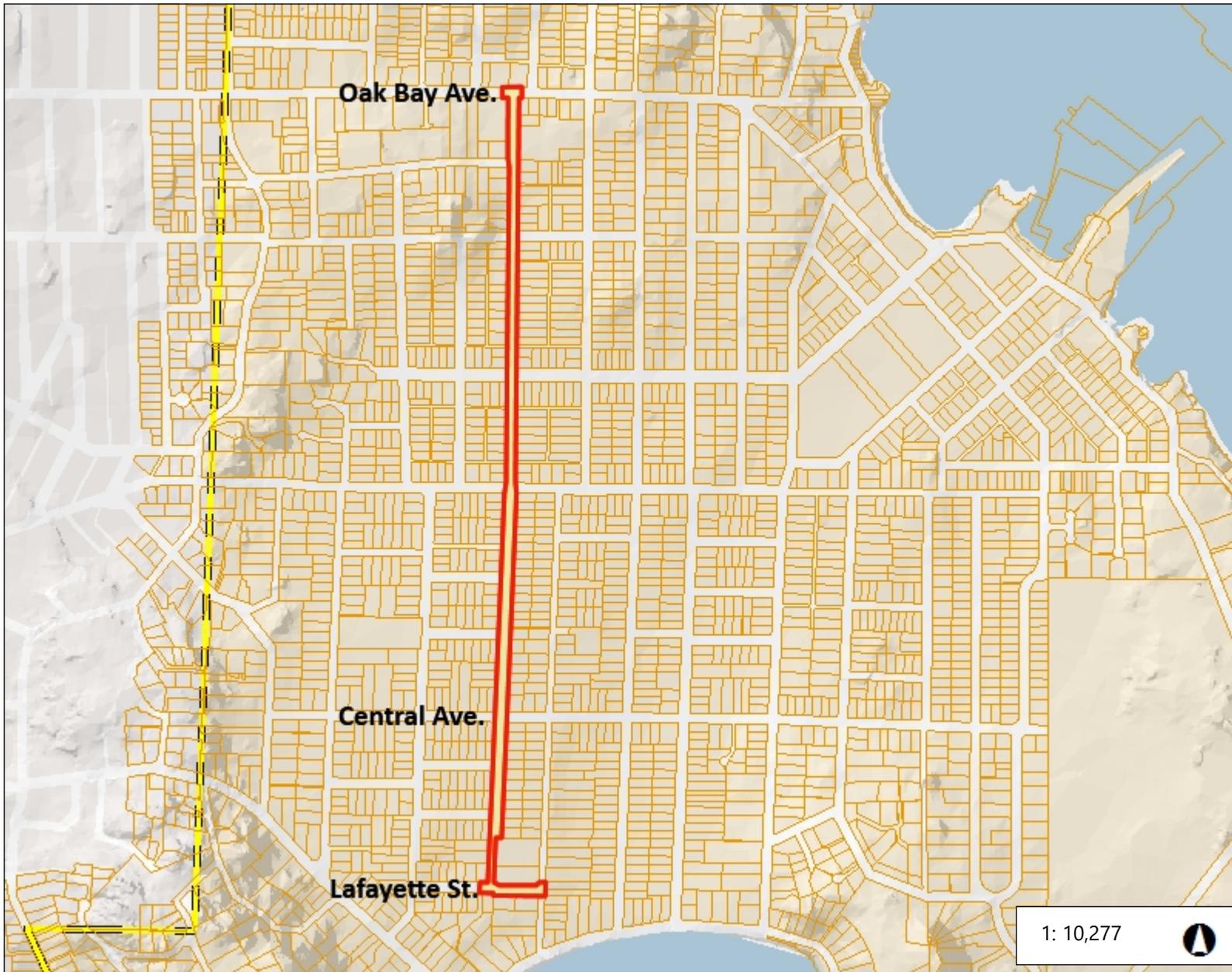
Provide at least three recent (within the last 5 years) references that show specific relevance to this project. Provide project name, project date/duration, project location, contract name, contact title/position, phone number and fax number. Indicate names of key personnel used on the referenced projects that will be involved on this project.

Reference 1	
Name of Organization	
Address of Organization	
Contact Person	
Contact Person's Title	
Contact Person's Tel and Email	
Contract Start and End Dates	
Description of similar project:	
Reference 2	
Name of Organization	
Address of Organization	
Contact Person	
Contact Person's Title	
Contact Person's Tel and Email	
Contract Start and End Dates	

Description of similar project:

Reference 3

Name of Organization	
Address of Organization	
Contact Person	
Contact Person's Title	
Contact Person's Tel and Email	
Contract Start and End Dates	



Legend

- Parcels
- Parcel
- Municipal Boundary
- Water
- Hillshade
 - High : 254
 - Low : 0
- Oak Bay
- Victoria
- Saanich

1: 10,277



Notes

0.5 0 0.26 0.5 Kilometers

NAD_1983_UTM_Zone_10N
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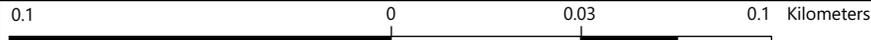
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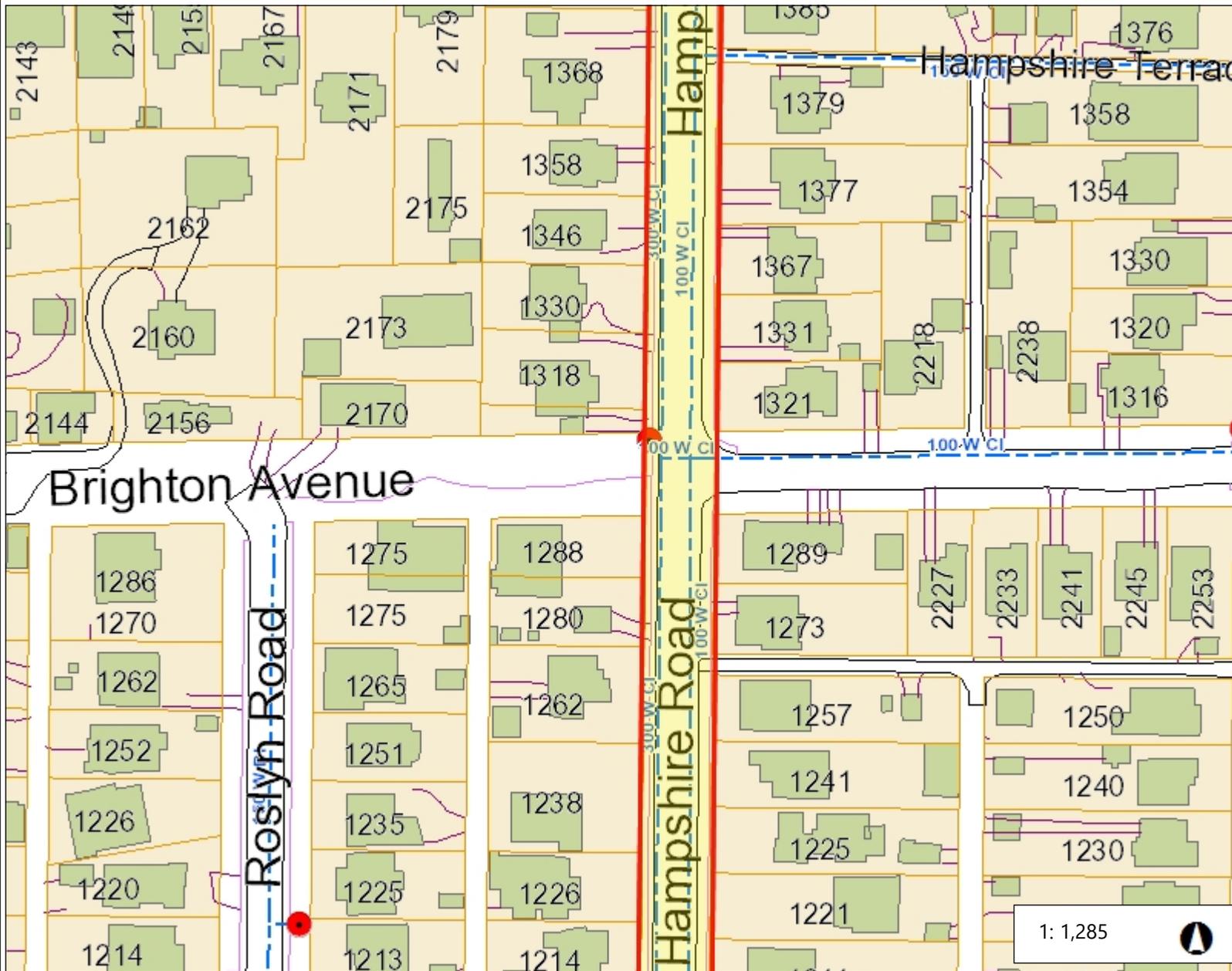
Legend

- Water Hydrant**
 - Municipal
 - Private
- Water Main**
 - Active
 - Abandoned
- Parcels
- Sidewalk
- Driveway
- Curb Line
- Building Footprint
- Parcel
- Municipal Boundary
- Water
- Oak Bay
- Victoria
- Saanich

1: 1,285



Notes



Legend

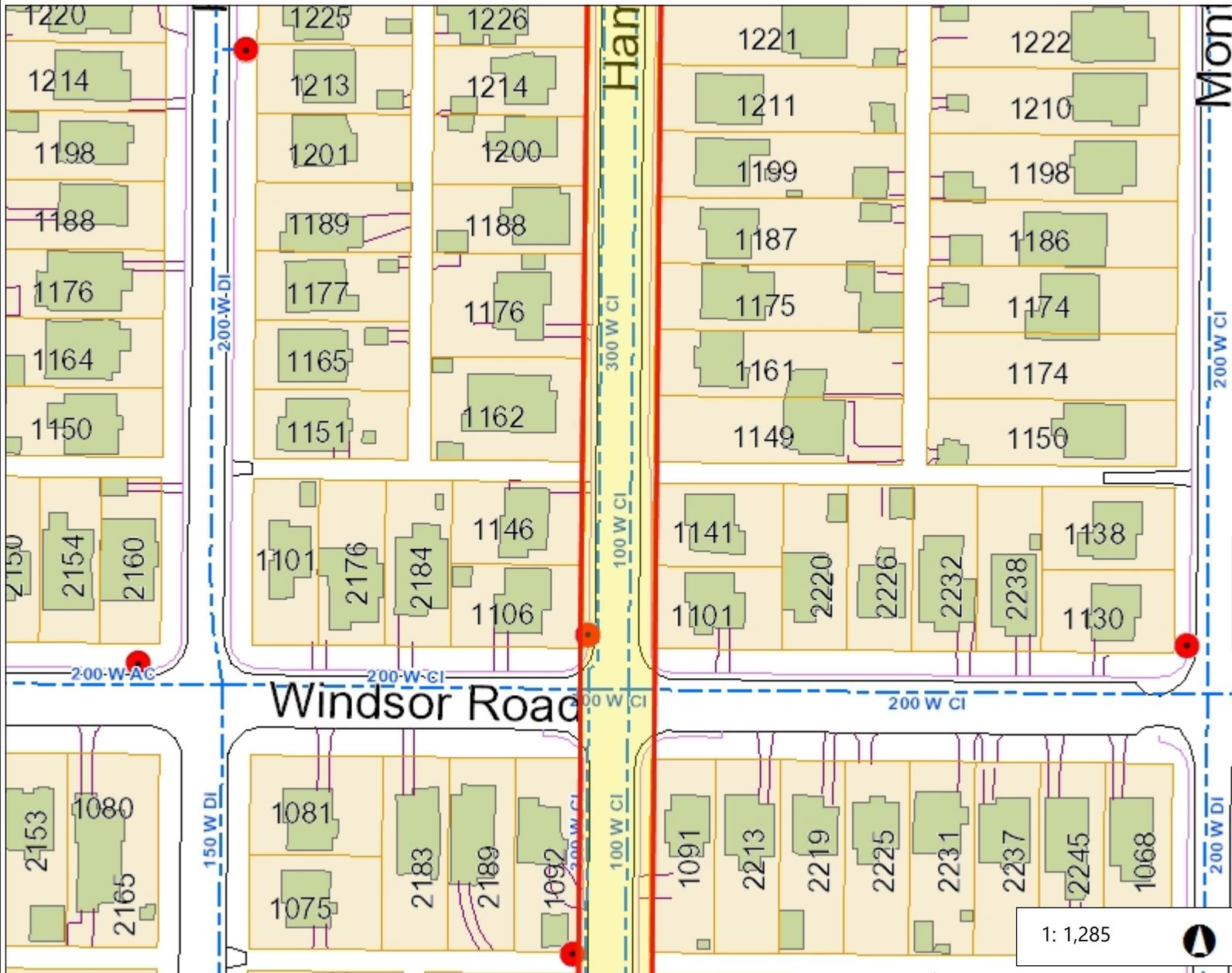
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1: 1,285



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Notes



Legend

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1: 1,285



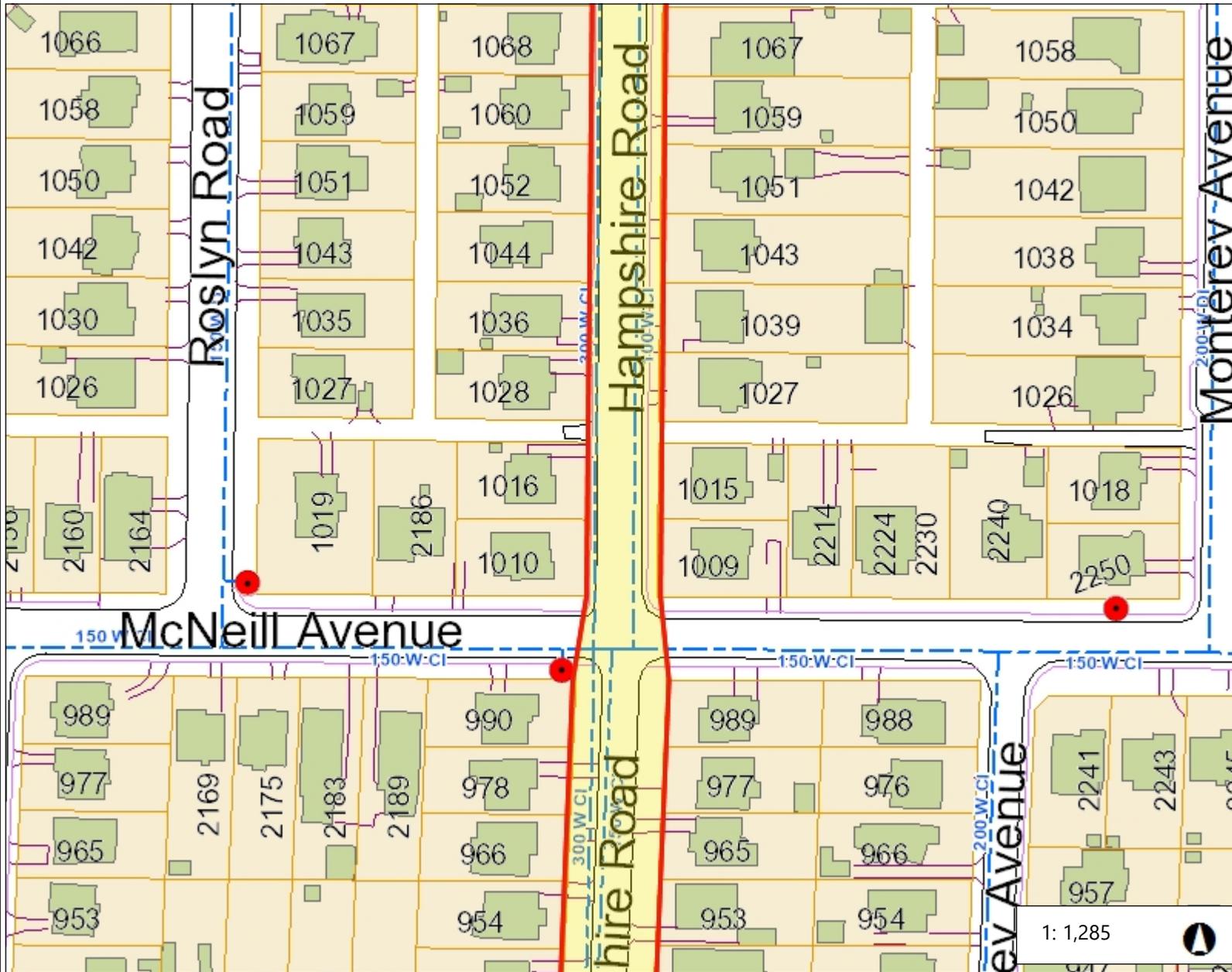
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Legend

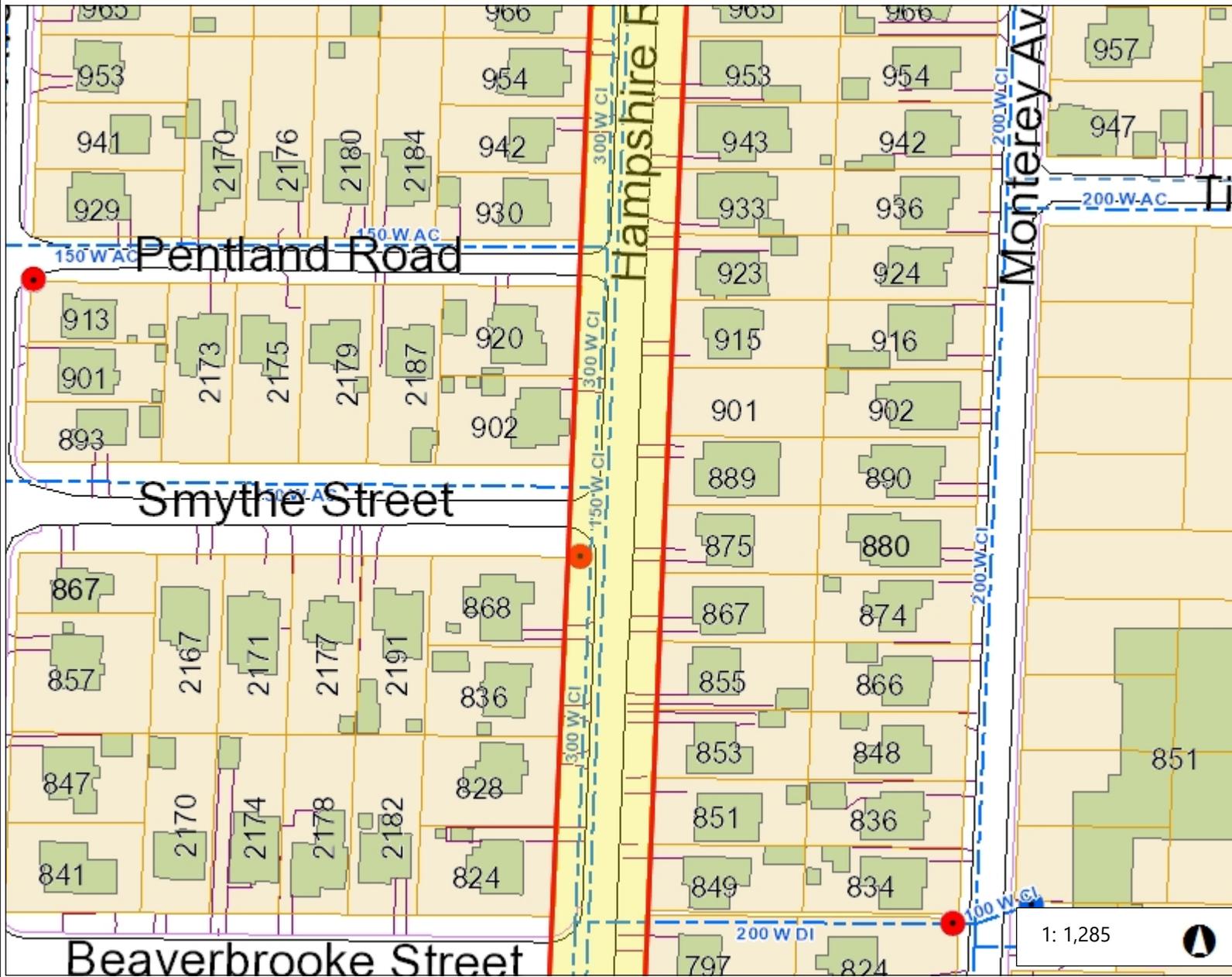
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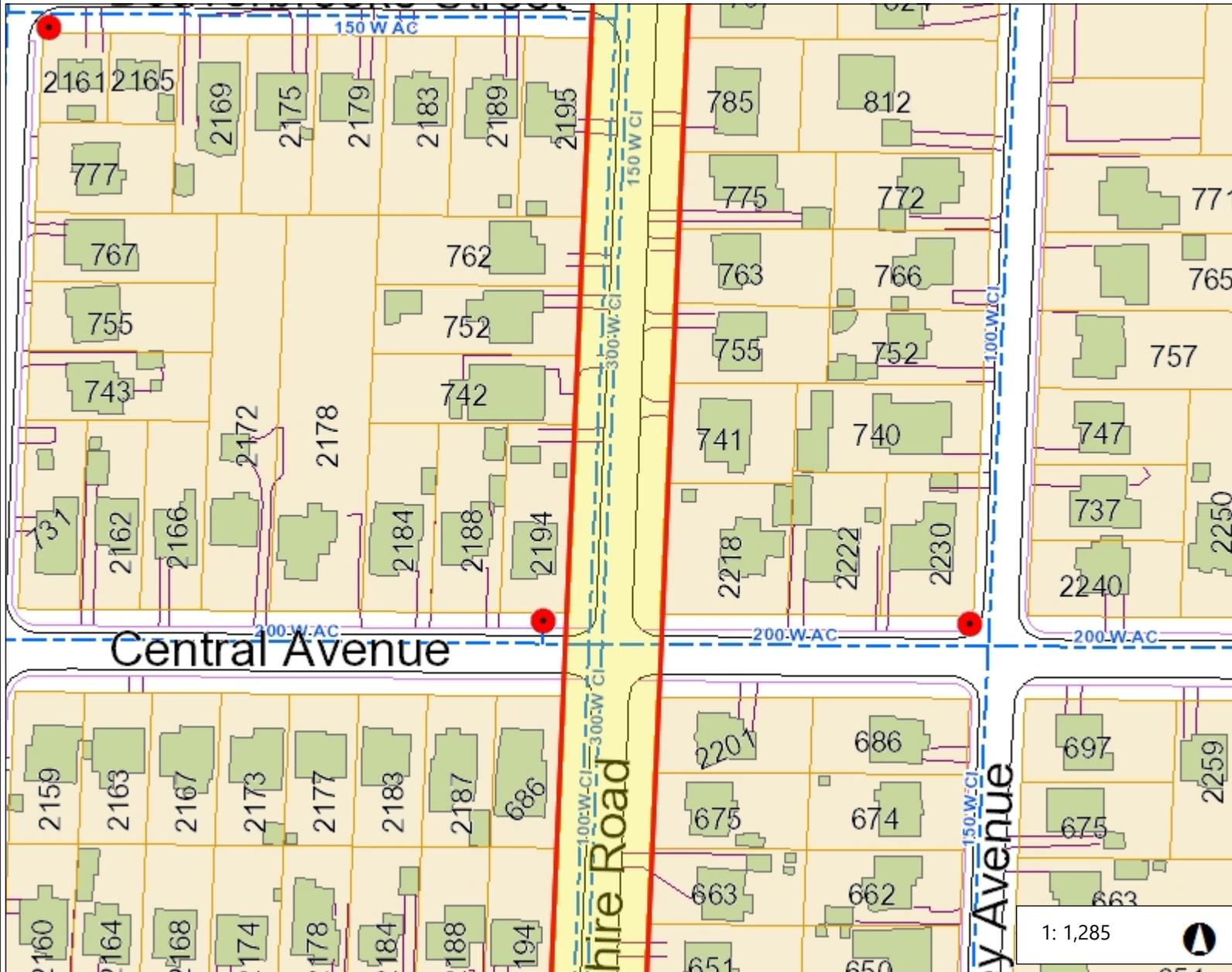
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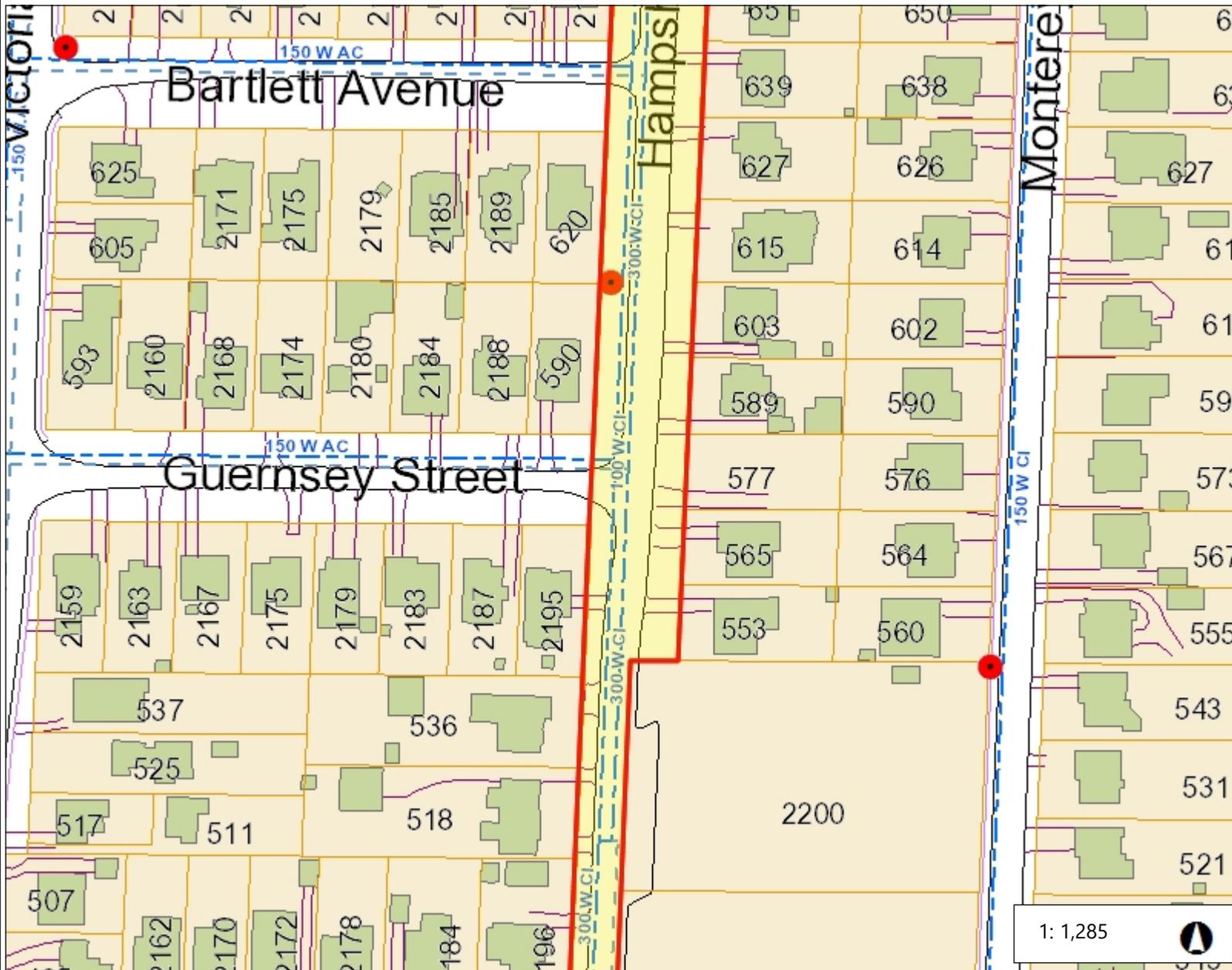
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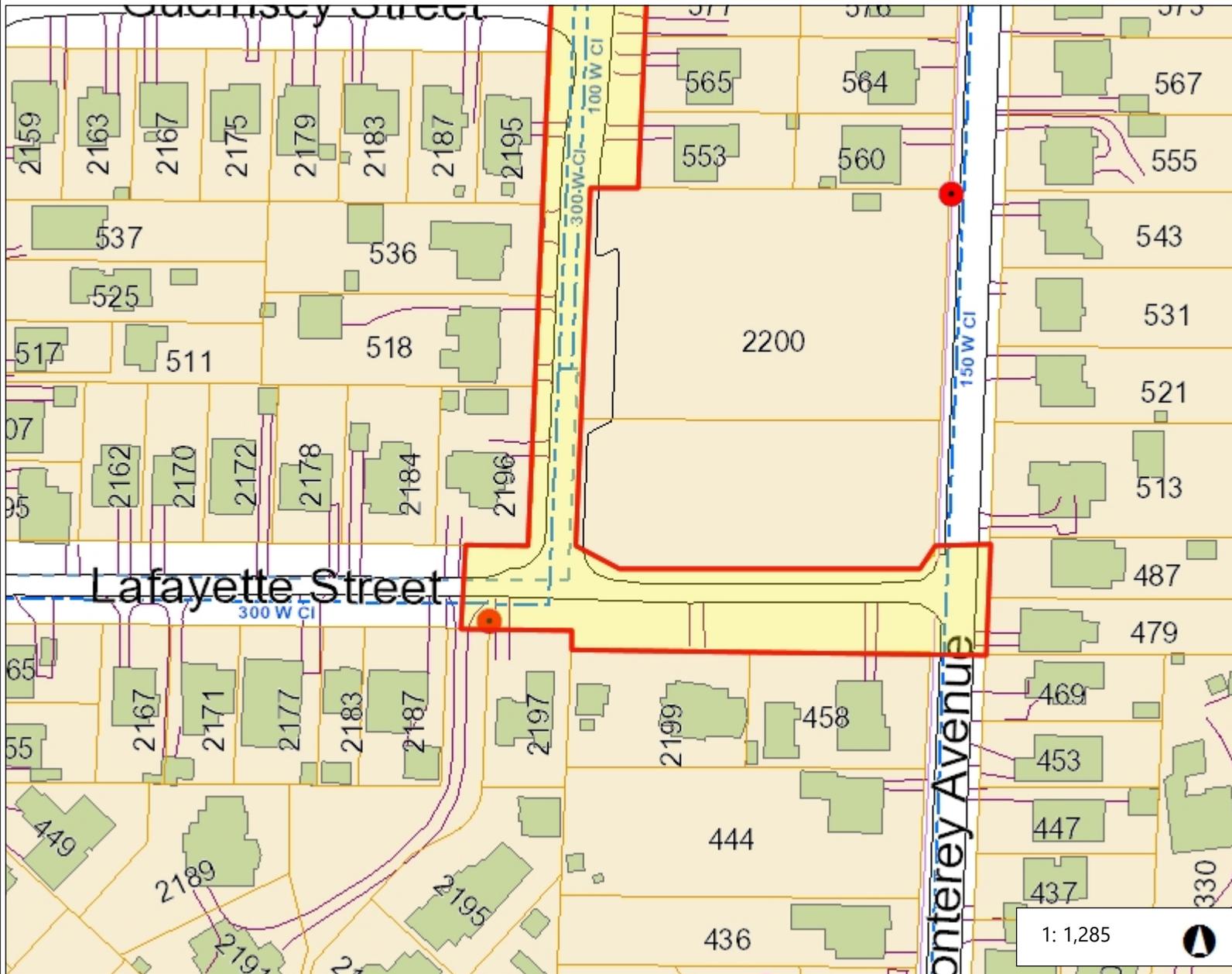
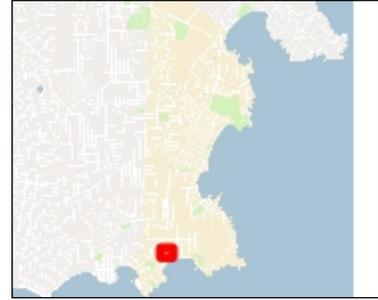
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