**SCHEDULE C – FORM OF PROPOSAL**

**RFP Project Title: ENDPOINT MANAGEMENT SOLUTION & EXISTING SOLUTION**

**DECOMMISSIONING SERVICE**

**RFP Reference No.: 1220-030-2021-014**

**Legal Name of Proponent:**

**Contact Person and Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Business E-Mail Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

TO:

City Representative: Richard D. Oppelt, Manager, Procurement Services

Address: Surrey City Hall

Finance Department – Procurement Services Section

Reception Counter, 5th Floor West

13450 – 104 Avenue, Surrey, B.C., V3T 1V8, Canada

E-mail for PDF Files: [purchasing@surrey.ca](mailto:purchasing@surrey.ca).

Dear Sir:

1. I/We, the undersigned duly authorized representative of the Proponent, having received and carefully reviewed all of the Proposal documents, including the RFP and any issued addenda posted on the City Website and BC Bid Website, and having full knowledge of the Site, and having fully informed ourselves as to the intent, difficulties, facilities and local conditions attendant to performing the Services, submit this Proposal in response to the RFP.
2. **I/We confirm** that the following schedules are attached to and form a part of this

Proposal:

Schedule C-1 – Statement of Departures;

Schedule C-2 – Proponent’s Experience, Reputation and Resources;

Schedule C-3 – Proponent’s Proposed Solution;

Schedule C-3-1 – Endpoint Management Solution & Existing Solution Decommissioning Services Requirements Response

Schedule C-4 – Proponent's Example Implementation Schedule; and

Schedule C-5 – Proponent’s Financial Proposal:

Schedule C-5-1 – Financial Worksheet (On-Premise).

**3.0 I/We confirm** that this Proposal is accurate and true to best of my/our knowledge.

**4.0** **I/We confirm** that, if I/we am/are awarded a contract, I/we will at all times be the “prime

contractor” as provided by the *Worker's Compensation Act (British Columbia)* with respect to the Solution. I/we further confirm that if I/we become aware that another consultant at the place(s) of the Solution has been designated as the “prime contractor”, I/we will notify the City immediately, and I/we will indemnify and hold the City harmless against any claims, demands, losses, damages, costs, liabilities or expenses suffered by the City in connection with any failure to so notify the City.

**This Proposal** is submitted this \_\_\_\_day of \_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_**.**

**I/We have the authority to bind the Proponent.**

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| --- | --- |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Legal Name of Proponent)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Signature of Authorized Signatory)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Print Name and Position of Authorized Signatory) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Signature of Authorized Signatory)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Print Name and Position of Authorized Signatory) |

***SCHEDULE C-1 - STATEMENT OF DEPARTURES***

**1.** I/We have reviewed the proposed Contract attached to the RFP as Schedule “B”. If requested by the City, I/we would be prepared to enter into that Contract, amended by the following departures (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**2.** The City of Surrey requires that the successful Proponent have the following in place **before commencing the Services**:

(a) Workers’ Compensation Board coverage in good standing and further, if an “Owner Operator” is involved, personal operator protection (P.O.P.) will be provided,

Workers' Compensation Registration Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(b) Prime Contractor qualified coordinator is Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

and Contact Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(c) Insurance coverage for the amounts required in the proposed Contract as a minimum, naming the City as additional insured and generally in compliance with the City’s sample insurance certificate form available on the City’s Website at [www.surrey.ca](http://www.surrey.ca) search [Consultants Certificate of Insurance](http://www.surrey.ca/files/DCT_Consultants_Form_Certificate_of_Insurance_2014.docx);

(d) City of Surrey or Intermunicipal Business License: Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(e) If the Consultant’s Solution is subject to GST, the Consultant’s GST Number is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; and

(f) If the Consultant is a company, the company name indicated above is registered with the Registrar of Companies in the Province of British Columbia, Canada, Incorporation Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

As of the date of this Proposal, we advise that we have the ability to meet all of the above requirements **except as follows** (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**3.** I/We offer the following alternates to improve the Services described in the RFP (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**4.** The Proponent acknowledges that the departures it has requested in Sections 1, 2 and 3 of this Schedule C‑1 will not form part of the Contract unless and until the City agrees to them in writing by initialling or otherwise specifically consenting in writing to be bound by any of them.

***SCHEDULE C-2 - PROPONENT’S EXPERIENCE, REPUTATION AND RESOURCES***

Proponents should provide responses to the following items, and if a particular item is inapplicable or cannot be answered, Proponents should clearly state why (use the spaces provided and/or attach additional pages, if necessary):

1. Provide a brief description of the Proponent’s current business;
2. Proponent’s relevant experience and qualifications in delivering Services similar to those required by the RFP;
3. Proponent’s demonstrated ability to provide the Services;
4. Proponent should describe their capability, capacity and plans for developing and supporting the deliverables, as well as describe contingency plans if the primary plan is not able to meet the project needs:
5. Using a format similar to the following, provide a summary of similar relevant contracts entered into by the Proponent in which the Proponent performed services comparable to the Services, including the jurisdiction the contract performed, the contract value, the date of performance. The City's preference is to have a minimum of three references.

|  |  |
| --- | --- |
| Name of client’s organization: |  |
| Reference Contact Information: | **Name:** |
| **Phone Number:** |
| **Email Address:** |
| How long has the organization been a client of the Proponent? |  |
| Provide the installation date of the comparative system, and any relevant comments. |  |
| Description of comparative system - Please be specific and detailed. |  |
| Information on any significant obstacles encountered and resolved for this type of Service. |  |

1. Proponent’s financial strength (with evidence such as financial statements, bank references);
2. Describe any difficulties or challenges you might anticipate in providing the Services to the City and how you would plan to manage these;
3. Proponents should identify key personnel and their roles and responsibilities for all phases of the project. The Proponent should submit resumes and also a short narrative description of relevant experience for all proposed key personnel, for example:

* Account Manager
* Project Manager
* Design, Development and Implementation Manager
* Testing Manager
* Technical Architect

Name:

Responsibility:

Experience:

1. Identify subcontractors, if any, the Proponent intends to use for the performance of the Services, describe the portion of the Services proposed to be subcontracted and a description of the relevant experience of the subcontractor, using a format similar to the following:

Subcontractor Name:

Subcontractor Services:

Experience:

***SCHEDULE C-3 - PROPONENT’S PROPOSED SOLUTION***

Proponents should provide responses to the following items, and if a particular item is inapplicable or cannot be answered, Proponents should clearly state why (use the spaces provided and/or attach additional pages, if necessary):

1. **Executive Summary**: Proponent should provide a brief narrative (preferably not to exceed 2 pages) that illustrates an understanding of the City’s requirements and Services and describing the proposed solution. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The executive summary should not include financial information;
2. A general description of the general approach and methodology that the Proponent would take in performing the Services including specifications and requirements;
3. **Transition from current state to target state:**

Describe the approach to transition from the existing solution to the proposed solution (define expectations around the decommissioning, such as co-existence during the transition (if not a big bang) or data / history transfer or archiving);

1. **Value Add**: The Proponent should provide a description of value-added, innovative ideas and unique services that the Proponent can offer to implement the City’s requirements relevant to the scope of services described in this RFP; and
2. Proponent should provide in detail how its proposed Solution meets the Endpoint Management Solution & Existing Solution Decommissioning Services Requirements. Please complete **Endpoint Management Solution & Existing Solution Decommissioning Services Requirements Response, Schedule C-3-1.**

**Schedule C-3-1 may be viewed and/or downloaded from the City of Surrey’s Managed File Transfer Service (MFT):**

Hostname: <https://mft.surrey.ca>

Logon ID surreybid

Password: Welcome

Locate Folder 1220-030-2021-014

***SCHEDULE C-4 - PROPONENT’S EXAMPLE IMPLEMENTATION SCHEDULE***

The City encourages responses that demonstrate a thorough understanding of the nature of the work and what the Contractor must do to get the work done properly. To this end, Proponents should provide an estimated project schedule, with major item descriptions and time indicating a commitment to provide the Endpoint Management Solution & Existing Solution Decommissioning Services and perform the Services within the time specified.

As a minimum, the Proponent’s Example Implementation Schedule should be in sufficient detail to specify the work breakdown structure for all tasks, deliverables as set out in Schedule A.

Proponent should indicate:

* Deliverable Work Product
* Service Start Date
* Work Product Delivery Date
* City Review Period (showing start and completion dates)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Deliverables** | **Service Start Date** | **Work Product Delivery Date** | **City Review Period** | |
| **Start Date** | **Completed Date** |
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***SCHEDULE C-5 - PROPONENT’S FINANCIAL PROPOSAL***

Indicate the Proponent’s proposed fee (excluding GST), using the following financial worksheet:

**1. Schedule C-5-1: Financial Worksheet (Example)**

**Schedule C-5-1 may be viewed and/or downloaded from the City of Surrey’s Managed File Transfer Service (MFT):**

Hostname: <https://mft.surrey.ca>

Logon ID surreybid

Password: Welcome

Locate Folder 1220-030-2021-014

**3. Additional Expenses:**

The proposed Contract attached as Schedule "B" to the RFP provides that expenses are to be included within the fee. Please indicate any expenses that would be payable in addition to the proposed fee set out above:

**4. Payment Terms:**

A cash discount of \_\_\_\_\_\_% will be allowed if account is paid within \_\_\_\_\_\_\_ days, or the \_\_\_\_\_\_\_\_\_ day of the month following, or net 30 days, on a best effort basis.

**Version Date: September 2018**

**RDO**