SCHEDULE C – FORM OF PROPOSAL

**RFP Project Title: Asset Appraisal Services**

**RFP Reference No.: 1220-030-2023-040**

**Legal Name of Proponent:**

**Contact Person and Title:**

**Business Address:**

**Business Telephone:**

**Business Fax:**

**Business E-Mail Address:**

TO:

City of Surrey

City Representative: Sunny Kaila, Manager, Procurement Services

E-mail for PDF Files: 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 Technical Proposal (Services);

Schedule C-4 – Proponent's Technical Proposal (Time Schedule); and

Schedule C-5 – Proponent’s Financial Proposal.

**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 Services. I/we further confirm that if I/we become aware that another consultant at the place(s) of the Services 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]** day of **[month],** **[year].**

**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 agreement 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 Services are 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 information on the following (use the spaces provided and/or attach additional pages, if necessary):

1. Location of primary business, branch locations, background, stability, structure of the Proponent and number of years business has been operational;
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’s equipment resources, capability and capacity, as relevant;
5. Proponent’s references (name and telephone number). The City's preference is to have a minimum of three references;

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| --- | --- |
| **Reference #1** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

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| **Reference #2** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

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| **Reference #3** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

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 provide information on the background and experience of all key personnel proposed to undertake the Services (use the spaces provided and/or attach additional pages, if necessary):

**Key Personnel**

Name:

Experience:

Dates:

Project Name:

Responsibility:

Dates:

Project Name:

Responsibility:

**Sub-Contractors**

1. Proponents should provide the following information on the background and experience of all sub-contractors proposed to undertake a portion of the Services (use the spaces provided and/or attach additional pages, if necessary):

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| **DESCRIPTION OF SERVICES** | **SUB-CONTRACTORS NAME** | **YEARS OF WORKING WITH PROPONENT** | **TELEPHONE NUMBER AND EMAIL** |
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SCHEDULE C-3 - PROPONENT’S TECHNICAL PROPOSAL (SERVICES)

Proponents should provide the following (use the spaces provided and/or attach additional pages, if necessary):

1. a narrative that illustrates an understanding of the City’s requirements and Services;
2. a description of the general approach and methodology that the Proponent would take in performing the Services including;

* timeline guarantees of services;
* suggested appraisal cycle and substantiation for the recommendation;
* ability to satisfy the scope of work, including a logical progression of tasks;
* milestones and time requirements;
* requirements of the City; and
* any additional terms and conditions.

1. a narrative that illustrates how the Proponent will complete the scope of Services, manage the Services, and accomplish required objectives within the City’s schedule;
2. a quality control/quality assurance plan for the provision of the Services. The plan will outline the scope of the activities, the level of resources needed, and related responsibilities;
3. **Reports**

Two copies of the final appraisal report will be provided. Information to be provided in the reports shall include, but not be limited to, the following:

1. A summary of all assets by City asset code - including building name, location and cost of replacement,
2. A detailed insurance appraisal report of each asset appraised in the current year including description, location, asset life and replacement cost, and
3. Annual updates from information provided by the City for each asset is not being physically appraised.

**Provide in your proposal a sample of the reports to be provided, which, meet the above specifications. Briefly describe what other reports are available and the cost.**

1. a service outline, maximum one page per service outline of the consulting services your firm can provide the City;
2. **Customer Service**

* Provide details about customer service response times and availability;
* Provide details on how your firm will provide the best value to the City. Include any creative, unique and innovative ideas that have been implemented with other clients for similar types of requirements;
* Describe what assistance your firm is willing to make available to assist the City in compiling accurate information and record keeping purposes; and

1. **Start up Plan**: Provide a description of your proposed transition plan. Provide a detailed start-up including proposed time frames and resources;

1. **Environmental and Social Responsibility**: Describe your commitment environmental stewardship initiatives, recycling practices and carbon footprint reduction; and,
2. **Value-Added Services**: 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. Unless otherwise stated, it is understood that there are no extra costs for these services.

SCHEDULE C-4 - PROPONENT’S TECHNICAL PROPOSAL (TIME SCHEDULE)

Proponents should provide an estimated project schedule, with major item descriptions and time indicating a commitment to perform the Services within the time specified (use the spaces provided and/or attach additional pages, if necessary).

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| **ACTIVITY**(Insert Milestone Dates) | **Time from Notice to Proceed in Days** | | | | | | | | | |
| **10** | **20** | **30** | **40** | **50** | **60** | **70** | **80** | **90** | **100** |
| Letter of Intent |  |  |  |  |  |  |  |  |  |  |
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| Substantial Completion |  |  |  |  |  |  |  |  |  |  |

SCHEDULE C-5 - PROPONENT’S FINANCIAL PROPOSAL

The Proponent shall indicate the proposed estimated fee to develop and provide asset appraisal services. The proposed estimated fee will be inclusive of and shall be broken down by all labour rates, travel (if applicable), materials, and printing and distribution of the draft and final appraisal. Labour rates shall be fixed for the negotiation of the services of this project.

The actual fee for each appraisal will be determined in contract negotiation with the selected service provider, and will be based on the particular properties to be appraised, not necessarily those described in Schedule “A”.

The method of payment to the Contractor will be by fixed lump sum fee basis.

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| **Task No.** | | **DESCRIPTION** | | **Estimated Quantity of Total Hours** | **Year 1 Annual Amount**  **($)** | **Year 2 Annual Amount**  **($)** | **Year 3 Annual Amount**  **($)** | **Year 4 Annual Amount**  **($)** | **Year 5 Annual Amount ($)** | **Total $** |
|  | | **Services:** | |  |  |  |  |  |  | **$** |
| **1.** | | Insurance Appraisal | |  |  |  |  |  |  | **$** |
| **2.** | | Insurance Appraisal Update | |  |  |  |  |  |  | **$** |
| **3.** | | COPE Reports | |  |  |  |  |  |  | **$** |
|  | | **Disbursements** | |  |  |  |  |  |  | **$** |
| **Subtotal:** | | | | | | | | | | **$** |
| **GST:** | | | | | | | | | |  |
|  |  | | **TOTAL PROPOSAL PRICE:** | | | | | | |  |

**Additional Expenses:**

The proposed Contract attached as Schedule "B" to the RFP provides that expenses are to be included within the fee, other than the expenses listed in the Contract as disbursements. Details of disbursements are to be shown in the chart above. Please indicate any expenses that would be payable in addition to the proposed fee and proposed disbursements set out above:

**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.