**PART 4 – FORM OF PROPOSAL**

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| **PROPONENT INFORMATION:** | | | | |
| Full Legal Name: |  | | | |
| Address: |  | | | |
| GST Registration No: | |  | PST Registration No. |  |
| Business License No. | |  | Jurisdiction: |  |
| *(Note: If the scope of work results in services being performed in the City of Surrey, the terms of the City’s Business License By-law apply and the Proponent will be required to provide proof of compliance prior to the contract start date)* | | | | |

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| **AUTHORIZED REPRESENTATIVE DETAILS:** | | | | |
| Name and title: | |  | | |
| Phone: |  | | Email: |  |

**TO: SURREY POLICE SERVICE (“SPS”) -** via email: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

**RE: REQUEST FOR PROPOSALS 1220-031-2021-003 – PRE-EMPLOYMENT MEDICAL EVALUATION SERVICES (“RFP”)**

In furtherance of the RFP issued on behalf of SPS, we, the above-named Proponent, hereby certify we have read and fully understand the RFP documents and hereby submit our offer for the performance of the Work.

SPS may, at its option, accept our proposal for the performance of all or any portion of the Work.

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| Signed on on behalf of the Proponent by its authorized signatory(ies):  *(date)* | |
| *Signature*  *Name (please print):*  *Title (please print):* | *Signature*  *Name (please print):*  *Title (please print):* |

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| ***Note:***  *This Form of Proposal should be signed by a person authorized to sign on behalf of the Proponent as follows:* *(a) For a corporation - the authorized signatory(ies) of the corporation;**(b) For a partnership or joint venture - each partner or joint venturer (or their authorized signatories as applicable)**\*\*For joint ventures, one joint venturer must assume overall responsibility for the RFP and the RFP process and be identified accordingly in the proposal; or**(c) For an individual (including a sole proprietorship) - the individual.* |

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| Attachments:   * Attachment 1 – Proponent Profile and Qualifications   + *(Note: Identify and attach supporting documents applicable to this Attachment – such as resumes and evidence of compliance with mandatory criteria)* * Attachment 2 – Workplan   + *(Note: Identify and attach supporting documents applicable to this Attachment – such as work product/reporting samples, work plans and evidence of compliance with mandatory criteria)* * Attachment 3 – Financial Proposal   + *(Note: Identify and attach supporting documents applicable to this Attachment* |

Attachment 1 - PROPONENT PROFILE AND QUALIFICATIONS

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| ***Note:*** *If space is insufficient, additional rows/lines or additional pages may be added as necessary.* |

1. **Form of Business Organization -** *check and complete as applicable*

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|  | Sole Proprietorship |  |
|  | Partnership – jurisdiction and date of establishment: |  |
|  | Corporation – jurisdiction and date of incorporation: |  |
|  | Joint Venture – identify all joint venturers, and who has primary responsibility for this RFP[[1]](#footnote-2) |  |

1. **Proponent Summary** *(Note: Provide background information (brief history, size, services offered, etc. If you have more than one location, identify the location(s) which will be performing the Work.))*

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1. **Experience, Qualifications and Capacity**

**Experience:** *(Note: Describe your relevant experience performing services the same/similar to the Work*):

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**Qualifications:** *(Note: Describe your qualifications and applicable certifications to perform the Work)*

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**Capacity:** *(Note: Describe your capacity to perform the Work, highlighting weekly performance thresholds (ie. maximum number of examinations/tests and resulting reporting per week))*

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**Mandatory Criteria:** *(Note: Describe, and attach evidence of, how you meet the mandatory criteria set out in Part 2 (Scope of Work/ Specifications))*

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1. **Financial References** (*Note: Attach financial statements and/or bank references to demonstrate financial stability).*

We hereby consent to SPS contacting our financial institution to obtain financial references:

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| --- | --- | --- |
| **Name and Address** | **Contact Name and Title** | **Contact Telephone Number** |
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1. **Client References** (*Note: List 3 client references (excluding SPS, Surrey Police Board or the City of Surrey), preferably from police/law enforcement organizations, and preferably in Canada or North America).*

We hereby consent to SPS contacting references for the purposes of evaluating our proposal.

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| **Company and Contact Name** | **Phone / Email** | **Work Description** |
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1. **Personnel** *(Note: List the personnel who will be performing the Work, and the primary contact for contract and performance management. Include a brief description of their experience, highlighting relevance and successful completion of work similar to the Work and its scope. Resumes and evidence personnel meet applicable mandatory criteria set out in Part 2 (Scope of Work / Specifications) should be attached. By providing this information, you warrant and represent you have each individual’s consent to disclosure of their personal information in accordance with privacy laws.*

*(Note: As per contract terms, changes to personnel are not permitted without written permission of SPS.)*

| **Name and Title** | **Area of Responsibility** | **Experience** |
| --- | --- | --- |
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1. **Sub-contractors** *(Note: List all proposed subcontractors and the work they will undertake. Where final selection has not been made, identify the potential subcontractors from which the selection will be made. If none, indicate “Not Applicable”. Evidence sub-contractors meet applicable mandatory criteria set out in Part 2 (Scope of Work / Specifications) should be attached. If any sub-contractors are individuals, by providing this information, you warrant and represent you have each individual’s consent to disclosure of their personal information in accordance with privacy laws.)*

*(Note: As per contract terms, changes to subcontractors are not permitted without written permission of SPS.)*

| **Name and Address** | **Contact Name / Phone Number** | **Area of Responsibility** | **Experience** (including years working with Proponent) |
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1. **Conflict of Interest** – *check as applicable*

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|  | To the best of our knowledge, upon undertaking appropriate investigation and due diligence, we are not aware of any employees or persons who may be involved in this project, being “Associates”[[2]](#footnote-3) of SPS or Surrey Police Board members, employees, officers or directors. |
|  | We are aware of conflict(s) of interest or potential conflict(s) of interest, as follows:  *(Note: Identify parties and their role in the project, confirm their relationship based on the definition of “Associate”, and described the proposed solution to manage, minimize or eliminate any perceived or actual conflict(s))*: |
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1. **Security Clearances/Background Checks** *(Note: Describe your process for performing/updating background checks/security clearances for personnel and sub-contractors):*

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**ATTACHMENT 2 – WORKPLAN**

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| ***Note:*** *If space is insufficient, additional rows/lines or additional pages may be added as necessary.* |

1. **Performance Methodology** (*attach separate page(s))*
   1. Demonstrate your capability to perform the Work, your understanding of the Work through a discussion of the key issues, and your ability to meet the requirements of the contract terms.
   2. Discuss your team’s approach to the Work.
   3. Provide a clear description of your plan and methodology to successfully accomplish the Work.
   4. Identify resources required to complete the Work from both you and SPS.
   5. Include assumptions made and assessment of risks and mitigation strategies.
2. **Workplan** (*attach separate page(s))*- *(Note: Provide a comprehensive summary of the scope of Work you will provide and a detailed schedule for the Work, setting out how you intend to complete the Work, including dates of key activities/milestones, deliverables associated with each activity/milestone and turnaround and response times.)*

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| **ACTIVITY**(Insert Milestone Dates) | **Time from Notice to Proceed** (in days) | | | |
| **1** | **5** | **7** | **Etc.** |
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1. **Reporting and Other Work Product Samples** (*attach separate page(s))*- *(Note: Provide samples of some of the reports and other deliverables applicable to the performance of the Work, including sample reports and detailed invoices.)*
2. **Scope/Specifications**

(*check as applicable)*

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|  | We accept Part 2 – Scope of Work/Specifications in its entirety. |
|  | We accept Part 2 – Scope of Work/Specifications with exceptions.  *(Note: Identify / describe proposed changes, equivalents, substitutions or alternatives with supporting information, data and documentation that the exception will meet or exceed SPS’s expectations. Nothing proposed in this section will apply unless incorporated into the Contract Terms.)* |
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*(Note: Identify any recommended additional scope required or recommended to successfully complete the Work or improve the Work. Nothing proposed in this section will apply unless incorporated into the Contract Terms)*

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1. **Equipment and Other Resources** *(Note: Unless already detailed in your attached Workplan, describe the equipment, technologies, and other resources you will utilize to perform the Work efficiently and effectively.)*

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1. **Security Protocols and Procedures** *(Note: Describe your processes and procedures for maintaining the confidentiality of the Work, Work Product, Work details, participant names and other confidential or personal information. Include a brief description of your information technology and data security policies as they pertain to your online case management portal and records management and maintenance. Provide a description of measures taken to maintain restricted access to systems, portals and records and to ensure appropriate data security practices are implemented and followed. Include information regarding access to work in progress and completed work (Is it restricted or limited? Who is able to gain access?) and frequency of data security audits.*

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1. **Protection of Personal and Confidential Information**
2. Privacy Policy - (*attach your Privacy Policy for review and approval by SPS*).
3. Storage of Information - – *check as applicable*:

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|  | We will not store confidential and/or sensitive information of SPS or personal information obtained as part of the Work on servers outside of Canada or allow anyone from outside of Canada to access such information. |
|  | We will or may store confidential and/or sensitive information of SPS or personal information obtained as part of the Services on servers outside of Canada, but confirm such information will be encrypted or de-identified, with the encryption keys and/or de-identification keys (as the case may be) stored on servers located within SPS’s data centres within Canada. |

1. **Customer Service** *(Note: Describe your customer service approach, including issues management, reporting, etc.)*

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1. **Contract Terms -** *Check one.*

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|  | We accept Part 3 (Contract Terms) of the RFP in its entirety. | | |
|  | We accept Part 3 (Contract Terms) of the RFP with exceptions.  *(Note: Identify and describe any proposed exceptions/changes.) (Nothing proposed in this section will apply unless incorporated into the Contract Terms).* | | |
|  | **Section** | **Change Proposed** | **Reason for Change** |
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1. **Additional and Value-Added Services** *(Note: Describe in detail any additional or value-added services not specifically requested but offered. There will be no extra costs associated with these services unless such costs are specifically included and explained in Attachment 3 – Costs and Pricing. Nothing proposed in this section will apply unless incorporated into the Contract Terms)*

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1. **Other Information** *(Note: Provide any other details and information you consider relevant or applicable to the RFP and your proposal or that specifically differentiates your proposal from others.)*

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1. **WorkSafeBC -** Attach clearance letter from WorkSafeBC.

**ATTACHMENT 3 – FINANCIAL PROPOSAL**

(This Attachment, subject to negotiations between SPS and the successful Proponents(s), will be incorporated into the Contract Terms)

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| ***Note:*** *Additional rows/lines, tables or pages may be added as necessary.* |

1. **PRICING AND PAYMENT TERMS:**
2. Currency. All prices are expressed in Canadian dollars.
3. Firm Pricing. All Fees will be fixed. Fees will be subject to an increase on each anniversary of the Start Date by a percentage no greater than the applicable percentage increase in the Consumer Price Index (All items) for Vancouver, British Columbia as published by Statistics Canada, or any successor government agency.
4. Discrepancies. If there are any obvious discrepancies between individual prices and the total amount, individual prices will govern.
5. **FEE CALCULATION / SCHEDULE OF RATES**

Indicate your proposed fee (excluding GST), and the basis of calculation as follows (as applicable):

* monthly fee;
* hourly rates for all personnel if payment is to be made on an hourly basis; or
* lump sum fee.

**SCHEUDLE OF RATES (Example) – ON A PER EXAMINATION BASIS**

|  |  |
| --- | --- |
| **Description** | **Per Evaluation**  (excl. GST and PST) |
| Pre-employment medical evaluation | $ |
| Re-examination (if required) | $ |
|  | $ |

1. **DISCOUNT(S):**

**Early Payment Discount**: A cash discount of \_\_\_\_\_\_% will be allowed if invoices are paid within \_\_\_\_ days.

**Other Discounts:** *(Note: Identity any currently available discounts, including based on volume of Work, etc.)*

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1. **ADDITIONAL / VALUE ADDED SERVICES (optional)**

| **Description** | **Price** |
| --- | --- |
|  | $ |
|  | $ |

1. **ADDITIONAL EXPENSES:** *(Note: The contract terms provide that Fees are inclusive of all expenses. Identify expenses, if any, that would be payable in addition to the Fees)*

| **Description** | **Price** |
| --- | --- |
|  | $ |
|  | $ |

1. **CANCELLATION POLICY:** *(Note: Provide your cancellation policy, indicating the timeframe an appointment may be cancelled without incurring a cancellation fee, if applicable. If you do not waive cancellation fees, SPS prefers a cancellation policy that will permit filling a cancelled appointment with a replacement appointment within a given timeframe.)*

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1. If the Proponent is a joint-venture/limited partnership, all information requested in sections A and B should be submitted for each participant in the joint-venture/limited partnership. A separate page may be attached for this purpose. The primary representative who shall assume all responsibilities for the Work, if successful, shall be identified. [↑](#footnote-ref-2)
2. "Associate" means (a) a spouse, (b) a parent, sibling, son or daughter, or the spouse of any one of them, (c) a relative who lives in the person’s home, (d) a company in which a person owns shares carrying more than 10% of the voting rights attached to all shares of the corporation, (e) a person’s business partner, or (f) a trust or estate of which a person is one of the main beneficiaries or for which the person serves as a trustee. [↑](#footnote-ref-3)