



**REQUEST FOR EXPRESSIONS OF INTEREST  
AND STATEMENTS OF QUALIFICATIONS**

**Title:** Psychometric Assessment

**Reference No.:** 1220-050-2019-017

**FOR PROFESSIONAL SERVICES**

**REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS**

**PRE-QUALIFICATION OF CONSULTANTS FOR THE PROVISION OF  
PSYCHOMETRIC ASSESSMENT**

**TABLE OF CONTENTS**

**1. INTRODUCTION .....3**  
1.1 Purpose ..... 3

**2. COMPETITIVE SELECTION PROCESS .....4**

**3. INSTRUCTIONS TO RESPONDENTS .....4**  
3.1 Address for Submission Delivery ..... 4  
3.2 Date..... 5  
3.3 Inquiries ..... 5  
3.4 Addenda ..... 6  
3.5 Status Inquiries ..... 6

**4. SUBMISSION FORM AND CONTENTS.....6**  
4.1 Package (Hard Copy) ..... 6  
4.2 Form of Submission ..... 7  
4.3 Signature ..... 8

**5. EVALUATION AND SELECTION.....9**  
5.1 Evaluation Team ..... 9  
5.2 Evaluation Criteria..... 9  
5.3 Litigation ..... 9  
5.4 Additional Information .....10  
5.5 Interviews ..... 10

**6. GENERAL CONDITIONS .....10**  
6.1 No City Obligation .....10  
6.2 Respondent's Expenses .....10  
6.3 No Contract.....11  
6.4 Conflict of Interest.....11  
6.5 Solicitation of Council Members and City Staff.....11  
6.6 Confidentiality ..... 11

**7. CITY DISCLAIMER .....11**

**8. DISCLAIMER .....12**

**SCHEDULE A - SCOPE OF SERVICES.....13**

# REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

## 1. INTRODUCTION

### 1.1 Purpose

The purpose of this request for expressions of interest / statements of qualifications (the “RFEOI/SOQ”) is to:

- (a) invite submissions (the “Submission”) from respondents (the “Respondent”) that describe the desire, relevant expertise, capability, reputation and resources of the Respondent to undertake the project as generally set out in Schedule A – Scope of Services; and
- (b) to select a Respondent or Respondents who may be invited to participate in the next stage of the competitive selection process, when called.

This RFEOI/SOQ is not a solicitation of proposals; rather it is a non-binding invitation to qualified Respondents to make themselves known to the City by providing information and by demonstrating to the City their desire, relevant expertise, capability, reputation and available resources.

All interested parties should respond to this RFEOI/SOQ as the City does not guarantee that a more formal procurement process (as determined at the City’s discretion) will be issued following this RFEOI/SOQ and may elect to directly negotiate with one or more interested parties, or the City may at any time and at its sole discretion decide to cancel this process for any reason.

### 1.1 Definitions

In this RFEOI/SOQ the following definitions shall apply:

“**BC Bid Website**” means [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca);

“**City**” means the City of Surrey;

“**City Representative**” has the meaning set out in section 2.3;

“**City Website**” means [www.surrey.ca](http://www.surrey.ca);

“**Date**” has the meaning set out in section 2.2;

“**Evaluation Team**” means the team appointed by the City;

“**Preferred Respondent(s)**” means the Respondent(s) selected by the Evaluation Team;

“**Respondent**” means an entity that submits a Submission;

“**RFEOI/SOQ**” means this Request for Expressions of Interest and Statements of Qualifications;

“**RFP**” means the Request for Proposals which may be issued by the City as a stage of the Competitive Selection Process;

“**Services**” has the meaning set out in Schedule A; and

“**Submission**” means a submission submitted in response to this RFEOI/SOQ.

## **2. COMPETITIVE SELECTION PROCESS**

2.1 This section describes the competitive selection process that the City intends to use in the selection of a Preferred Respondent or Preferred Respondents. The anticipated competitive selection process includes two stages; the RFEOI/SOQ, and the RFP.

### **(a) Stage One – (RFEOI/SOQ) (Prequalification)**

This RFEOI/SOQ to prequalify Respondents with the necessary experience to provide psychometric assessment services is open to all interested Respondents. The prequalification of a Respondent is based on defined requirements specified in this document. The prequalification of a Respondent is based on the evaluation criteria specified in this RFEOI/SOQ.

### **(b) Stage Two – Request for Proposals (RFP)**

An RFP will be sent to Preferred Respondents once the prequalification process has been completed. Only those Respondents who have been prequalified by the City in Stage One will be eligible to participate in Stage Two. The decision to participate in the RFP in Stage Two is the decision of each prequalified Respondent.

2.2 Should there be an insufficient number of prequalified Respondents after Stage One to permit a competition in Stage Two, the City reserves the right to cancel Stage Two or to modify the requirements and re-publish the solicitation using the same or a different approach. The assessment of the sufficiency of number of prequalified Respondents shall be at the City’s sole and absolute discretion.

The City reserves the right to accept or reject any or all responses to this RFEOI/SOQ.

## **3. INSTRUCTIONS TO RESPONDENTS**

### **3.1 Address for Submission Delivery**

A Submission should be labelled with the Respondent’s name, RFEOI/SOQ title and number. A Submission should be submitted in the form as described in **Section 4.2 – Form of Submission**.

The Respondent may submit a Submission either by email or in a hard copy, as follows:

**(a) E-mail**

If the Respondent chooses to submit by email, the Respondent should submit the Submission electronically in a single pdf file which must be received by the City by email at: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

**PDF emailed Submissions are preferred**, and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email attachments, Respondents should phone [604-590-7274] to confirm receipt. A Respondent bears all risk that the City's computer equipment functions properly so that the City receives the Submission.

**(b) Hard Copy**

If the Respondent chooses NOT to submit by email, the Respondent should submit one (1) original unbound Submission and three (3) copies (four (4) in total) which must be delivered to the City at the office of:

Name: Richard D. Oppelt, Manager, Procurement Services  
at the following location:

Address: Surrey City Hall  
Finance Department – Procurement Services Section  
Reception Counter, 5<sup>th</sup> Floor West  
13450 – 104 Avenue, Surrey, B.C., Canada V3T 1V8

**3.2 Date**

The City would prefer to receive Submissions on or before **September 26, 2019**. The City's office hours are 8:30 am to 4:00 pm, except holidays.

**3.3 Inquiries**

All inquiries related to this RFEOI/SOQ should be directed, by email, to the person named below (the "**City Representative**"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Richard D. Oppelt, Manager, Procurement Services  
Email: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

Reference: #1220-050-2019-017

Inquiries should be made no later than seven (7) business days before the closing Date. The City reserves the right not to respond to inquiries made within seven (7) business

days of the closing Date. Inquiries and responses will be recorded and may be distributed to all Respondents at the discretion of the City.

Respondents finding discrepancies or omissions in the RFEOI/SOQ documentation or having doubts as to the meaning or intent of any provision should immediately notify the City Representative. If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue an addendum in accordance with section 3.4. No oral conversation will affect or modify the terms of this RFEOI/SOQ nor be relied upon by any Respondent.

### **3.4 Addenda**

If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue a written addendum by posting it on the BC Bid Website at [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca) (the “BC Bid Website”) and the City Website at [www.surrey.ca](http://www.surrey.ca) (the “City Website”) that will form part of this RFEOI/SOQ. No amendment of any kind to the RFEOI/SOQ is effective unless it is posted in a formal written addendum on the City Website. Upon submitting a Submission, Respondents will be deemed to have received notice of all addenda that are posted on the City Website.

### **3.5 Status Inquiries**

All inquiries related to the status of this RFEOI/SOQ, including whether or not a Respondent has been selected, should be directed to the City Website and not to the City Representative.

## **4. SUBMISSION FORM AND CONTENTS**

### **4.1 Package (Hard Copy)**

If the Respondent chooses NOT to submit by email, the Respondent should submit a Submission in a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The City also has an environmentally preferable purchasing commitment and seeks a package format to support the green expectations and initiatives of the City.

Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your Submission, they should be fully 100% recycled stock.

The City seeks and prefers submittals on 100% Post Consumer Fibre (PCF) paper, consistent with the City’s policy and the City environmental practices.

Please double side your Submission.

Submissions should be in a sealed envelope/package, marked on the outside with the Respondent's name, title of the Submission and reference number.

#### **4.2 Form of Submission**

There is no form to fill out. Respondents should address clearly and in sufficient depth the points below that are subject to the evaluation criteria against which the Response will be evaluated. Respondents should also include a short cover letter signed by the person(s) with authority to act on behalf of the Respondent. The cover letter should certify that the information contained in the Submission is true, complete and correct and indicate the Respondents contact person(s) for the RFEOI/SOQ along with the person's title, phone number and e-mail address.

Respondents are encouraged to respond to the items listed below in the order listed:

##### **(a) Experience**

- (i) Provide a brief description of the Respondent's current business inclusive of:
  - full legal name and contact information including office address, telephone, fax and website address;
  - name, address, business telephone number, business email address and business fax number of the Respondent's designated contact person; and
  - company background, structure and ownership details.
- (ii) Respondent should describe their relevant experience and qualifications in delivering Services similar to those required by this RFEOI/SOQ. Describe why this experience is relevant to this project;
- (iii) Respondent's demonstrated ability to provide the Services;
- (iv) Respondent's references (name and telephone number). The City's preference is to have a minimum of three references;
- (v) Respondents should describe any difficulties or challenges you might anticipate in providing Services to the City and how you would plan to manage these;

##### **(b) Reputation**

- (vi) describe how the Respondent's process and frequency of quality control reviews and how corrective measures could be implemented;
- (vii) describe the Respondent's organization's policies with respect to the Personal Information Protection and Electronic Documents Act (PIPEDA);

- (viii) describe how the Respondent's storage and access to private information as defined in the Freedom of Information and Protection of Privacy Act (BC) ("FIPPA"), meets regulatory compliance;
- (ix) Describe Respondent's specific expertise in providing guidance, recommendation and innovative approaches to conducting psychometric assessments to recruitment of candidates;

**(c) Resources**

- (x) Respondent should describe demonstrated strength and relevant resources, capability and capacity to carry out the Services;
- (xi) Respondent should provide details on their ability and capacity to meet psychometric assessment requirements, including certified personnel and equipment and/or use of subcontractors. Provide copies of curriculum vitae; and
- (xii) Does the Respondent have trained backup personnel to the crew normally designated to perform the Services, who can be called on to perform the Services within little or no interruption in providing the services.

**4.3 Signature**

The Submission should be signed by a person authorized to sign on behalf of the Respondent and include the following:

- (a) If the Respondent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Submission should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Submission on behalf of the corporation is submitted;
- (b) If the Respondent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venturer should be included, and each partner or joint venturer should sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the City that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venturer is a corporation then such corporation should sign as indicated in subsection (a) above; or
- (c) If the Respondent is an individual, including a sole proprietorship, the name of the individual should be included.



## **5. EVALUATION AND SELECTION**

### **5.1 Evaluation Team**

The evaluation of Submissions will be undertaken on behalf of the City by an Evaluation Team. The Evaluation Team may consult with others including City staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required. The Evaluation Team will give a written recommendation for the selection of a Preferred Respondent or Preferred Respondents to the City.

### **5.2 Evaluation Criteria**

The Evaluation Team will compare and evaluate all Submissions to determine the Respondent's strength and ability to provide the Services to the City in order to determine the Submission(s) is most advantageous to the City, using the following criteria:

**(a) Experience**

The Evaluation Team will consider the Respondent's responses to items in (i) to (v) in Section 4.2(a) – Form of Submission;

**(b) Reputation**

The Evaluation Team will consider the Respondent's responses to items (vi) to (ix) in Section 4.2(b) – Form of Submission.

**(c) Resources**

The Evaluation Team will consider the Respondent's responses to items (x) to (xii) in Section 4.2(c) – Form of Submission.

The Evaluation Team will not be limited to the criteria referred to above, and the Evaluation Team may consider other criteria that the team identifies as relevant during the evaluation process. The Evaluation Team may apply the evaluation criteria on a comparative basis, evaluating the Submissions by comparing one Respondent's Submission to another Respondent's Submission. All criteria considered will be applied evenly and fairly to all Submissions.

The City currently anticipates that it may carry out a more formal procurement process for release to multiple qualified Respondents.

### **5.3 Litigation**

In addition to any other provision of this RFEOI/SOQ, the City may, in its absolute discretion, reject a Submission if the Respondent, or any officer or director of the Respondent submitting the Submission, is or has been engaged directly or indirectly in a legal action against the City, its elected or appointed officers, representatives or

employees in relation to any matter, or if the City has initiated legal action against any officers or directors of the Respondent.

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

#### **5.4 Additional Information**

The Evaluation Team may, at its discretion, request clarifications or additional information from a Respondent with respect to any RFEOI/SOQ, and the Evaluation Team may make such requests to only selected Respondents. The Evaluation Team may consider such clarifications or additional information in evaluating a Submission.

#### **5.5 Interviews**

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

### **6. GENERAL CONDITIONS**

#### **6.1 No City Obligation**

This RFEOI/SOQ is not a tender and does not commit the City in any way to select a Preferred Respondent(s), or to proceed to negotiations for an agreement, or to award any agreement, and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFEOI/SOQ process.

#### **6.2 Respondent's Expenses**

Respondents are solely responsible for their own expenses in preparing, and submitting a Submission, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from this RFEOI/SOQ. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Submission, or participating in subsequent proposal requests, negotiations for an agreement, or other activity related to or arising out of this RFEOI/SOQ.

### **6.3 No Contract**

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

### **6.4 Conflict of Interest**

A Respondent shall disclose in its Submission any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

### **6.5 Solicitation of Council Members and City Staff**

Respondents and their agents will not contact any member of the City Council or City staff with respect to this RFEOI/SOQ, other than the City Representative named in section 3.3, at any time prior to the award of an agreement or the cancellation of this RFEOI/SOQ.

### **6.6 Confidentiality**

All Submissions become the property of the City and will not be returned to the Respondent. All Submissions will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

## **7. CITY DISCLAIMER**

- a. The information in this RFEOI/SOQ and any further supporting documentation is provided for reference purposes only. It is the responsibility of interested parties to confirm the accuracy and applicability of this information. All costs related to updating or acquiring additional information shall be born solely by the Respondent. The information contained in this RFEOI/SOQ has been prepared, in part, on information provided by others, and such information is believed to be accurate and reliable. However, by its receipt of this RFEOI/SOQ, each Respondent remises, releases, and forever discharges the City and its representatives (including staff and consultants and other professional advisors) from any and all claims which such person has, have, or may hereafter have arising out of any information contained herein. Any party who intends to submit a response to this RFEOI/SOQ is specifically invited to independently verify the accuracy of the information contained herein.
- b. The City shall not be obligated to review or accept any Submission and may reject any or all Submissions without giving reasons therefore.

- c. All negotiations and discussions with Respondents are on a “without prejudice” basis and cannot be construed as an agreement, and/or otherwise unless expressly approved by City Council and a written agreement is signed by the City.
- d. The City may negotiate with any one or more of the Respondents without having any duty or obligation to advise or allow any other Respondents to vary their Submission or otherwise negotiate with the City.
- e. The City may enter into discussions to clarify issues related to any Submission. If at any time the City reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached, the City may give notice terminating discussions, but is under no obligation to do so.
- f. The City does not authorize any other person or agency to represent the project on its behalf without the prior written approval of the City.
- g. By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFEOI/SOQ process.

**8. DISCLAIMER**

Notwithstanding anything contained herein, the Respondent agrees that he shall take all necessary steps to confirm the accuracy of this RFEOI/SOQ and agrees that the City shall have no liability whatsoever in respect of any losses or damages of any kind howsoever arising in relation to this RFEOI/SOQ.

## **SCHEDULE A - SCOPE OF SERVICES**

**PROJECT TITLE: PSYCHOMETRIC ASSESSMENTS**

**REFERENCE NO.: 1220-050-2019-017**

### **1. PURPOSE**

The City of Surrey (the “City”) seeks an experienced and qualified Consultant to provide psychometric assessments for recruitment, selection, and employee development on an “as and when required basis”.

The Consultant will provide consulting services to include but not limited to the following:

- (a) Candidate assessment
- (b) Employee Development

### **Background**

The City of Surrey is a rapidly growing and diverse community located in the Province of British Columbia. It is the 12th largest city in Canada and the second largest in BC. Surrey is home to almost half a million residents and 16,000 businesses within its six town centers of Fleetwood, Surrey City Centre, Guildford, Newton, Cloverdale, and South Surrey.

Currently, the City uses psychometric assessments as part of recruitment, selection and employee development on an “as needed” basis. Typically, it is used to provide psychological measurement to aid in the recruitment, selection and development of candidates for exempt management roles and for some professional/technical roles. The City has recently developed a competency framework that will serve as the foundation for how we assess candidates for recruitment, selection, and development. Psychometric assessment is one of the tools, among others, that will be used to assess candidates against our competency framework.

### **2. SCOPE OF SERVICES**

The City anticipates the following scope of Services:

- (a) work with the City’s Human Resources Department (HR) to identify the requirements for the psychometric assessment;
- (b) develop and administer legally compliant, valid and reliable psychometric assessments for selection and development purposes;
- (c) conduct in-depth psychometric assessment, analysis and evaluation of candidates in accordance with requirements of the role;
- (d) provide detailed written psychometric report, in-person feedback and post-assessment counseling and support where required;
- (e) assist HR Department with administering, responding to questions from and providing information to employees and staff, and providing related consulting services, as required;

- (f) be available as needed to answer questions and resolve issues that arise regarding assessment outcomes, contract administration and service provisions;
- (g) be able to secure and maintain candidates' assessments and reports in compliance with the Freedom of Information and Protection of Privacy Act (FIPPA); and
- (h) able to securely transmit reports coming back to the City.

### **3. RESPONDENT'S PREFERRED QUALIFICATIONS**

The City prefers the Consultant to be able to demonstrate the following:

- (a) certified registered psychologist with the College of Psychologists of B.C.;
- (b) hold a postgraduate doctoral degree (PhD) and/or Certified Management Consultant (CMC) designation;
- (c) proven comprehensive experience and knowledge in conducting psychometric assessments for selection and development for an organization of similar sector and size, as the City for a minimum of ten (10) years; and
- (d) possess exceptional verbal & written communication skills, interpersonal skills, and organizational skills.

### **4. CUSTOMER SERVICE**

The Consultant will provide exceptional customer service to the City that include:

- (a) assigning an account manager and service representative dedicated to the City to coordinate and oversee all services provided;
- (b) conducting periodic meetings, face to face meetings or telephone conversations as required;
- (c) providing consultation to HR prior to assessment to understand the specific role requirements;
- (d) Provide a detailed written report of each assessment conducted including a personalized development plan; and
- (e) Be available in person to provide post-assessment consultation on assessment findings.

### **5. COMMUNICATION**

- 5.1 The Consultant should be available at all reasonable times to report and confer with City's HR Department with respect to the Services. Communication shall be available via email, telephone, and in-person meetings. Phone conversations must be followed up with written communication.
- 5.2 The Consultant should be available to attend meetings hosted by the City in advance of each assessment (if required) and post-assessment for debrief.

- 5.3 The Consultant will designate an individual to serve as the primary point of contact for this Agreement. The Consultant should not change the primary point of contact without written authorization from the City. Consultant will also designate a backup point of contact in the event the primary is not available.
- 5.4 In the event of a problem or potential problem that may impact the quality or quantity of work, services, or the level of performance under this Agreement, the Consultant should notify the City in writing and by telephone.

**-END OF PAGE-**