



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

Title: URBAN FOREST MANAGEMENT STRATEGY

Reference No.: 1220-050-2019-027

FOR PROFESSIONAL SERVICES

(General Services)
Issue Date: December 10, 2019

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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 “RFEI/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 RFEI/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 experience, qualifications, capability, reputation and available resources.

All interested parties should respond to this RFEI/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 RFEI/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.

1.2 Estimated Project Schedule

The City anticipates that the selection of the Proponent will proceed according to the following timetable:

Description	Date
Issuance of RFEI/SOQ	December 10, 2019
RFEI/SOQ Preferred Date for Submission	January 15, 2020
Commencement of Evaluation of Submissions (Approx.), Interviews and Clarifications	To be determined, as required
Selection of Preferred Respondents	Week of February 3, 2020
Distribution of solicitation document for Stage 2 - RFP	Week of February 3, 2020

The dates are estimates only. The City reserves the right, at its sole discretion, to make changes to the dates above based on the City’s requirements.

1.3 Definitions

In this RFEOI/SOQ the following definitions shall apply:

“**BC Bid Website**” means www.bcbid.gov.bc.ca;

“**City**” means the City of Surrey;

“**City Representative**” has the meaning set out in section 3.3;

“**City Website**” means www.surrey.ca;

“**Date**” has the meaning set out in section 3.2;

“**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;

“**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 relevant experience and qualifications to undertake the project as generally set out in Schedule A – Scope of Services and is open to all interested parties. 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 3.2 – 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 delivered to the City by email at: 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 one (1) copy (two (2) 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, 5th Floor West
13450 – 104 Avenue, Surrey, B.C., Canada V3T 1V8

3.2 Date

The City would prefer to receive Submissions on or before **January 15, 2020**. 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

Reference: 1220-050-2019-027

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 2.4. 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 (the “BC Bid Website”) and the City Website at 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

Respondents should complete the form of Submission attached as Schedule B – Form of Submission, including Appendices A and B and a short summary of the key features of its Submission. Respondents are encouraged to respond to the items listed in Schedule B in the order listed. Respondents are encouraged to use the forms provided and/or attach additional pages, if necessary.

Upon submitting a response to this RFEOI/SOQ, Respondents consent to the City and their representatives checking and verifying the information provided. References may also be contacted.

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, Reputation and Resources; and
- (b) Technical (including approach methods and understanding of Services required).

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 2.3, 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

- 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.

Notwithstanding anything contained herein, the Respondent agrees that they 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.

[END OF PAGE]

SCHEDULE A SCOPE OF SERVICES

PROJECT TITLE: URBAN FOREST MANAGEMENT STRATEGY

REFERENCE NO.: 1220-050-2019-027

1. PURPOSE / PROJECT BACKGROUND

- 1.1** The City is seeking Submissions to pre-qualify interested Respondents to provide professional services to develop an Urban Forest Management Strategy (“the Strategy”) for the City.
- 1.2** The City’s urban forests include individual trees, groups of trees and natural areas across a range of urban land uses, on both public and private property. The City’s Parks, Recreation & Culture, Planning and Development, and Engineering Departments currently work together to manage the City’s urban forest, implementing existing City strategies and plans, including, but not limited to the:
- (a) Official Community Plan Bylaw 18020;
 - (b) Zoning Bylaw 12000;
 - (c) Tree Protection Bylaw 16100;
 - (d) Tree Cutting on City Land & Boulevards Bylaw 5835;
 - (e) Biodiversity Conservation Strategy; and
 - (f) Sustainability Charter 2.0.
- 1.3** In December 2017, the City’s Environmental Advisory Committee passed a motion that “Council direct City staff to develop a City-wide Urban Forest Management Strategy that defines a sustainable urban forest with management objectives and a strategic action plan to achieve, short, medium and long-term goals”. This motion was approved by City Council in March 2018.
- 1.4** This new Strategy will integrate existing policy, strategies and plans to provide a clear direction for the management of the City’s urban forest.

2. PROJECT OBJECTIVES / DESIRED OUTCOMES

- 2.1** The successful Respondent will deliver a Strategy that defines a sustainable and equitable urban forest that benefits all residents in the City. The Strategy will identify a vision and management objectives for the City’s urban forest, with a strategic action plan identifying short, medium, and long-term goals.
- 2.2** The Strategy will be delivered in two phases. An interim report and presentation to the City’s Environmental Sustainability Advisory Committee is required at the end of Phase I. The development of the final Strategy in Phase II will be guided by the recommendations provided in the Phase I report.

- 2.3** Measurable targets that will achieve the vision and objectives should be identified, along with supporting recommendations for implementing the Strategy over a defined time period.
- 2.4** The successful Respondent will work with local community groups, stakeholder groups and City staff to develop the Strategy.
- 2.5** The successful respondent should identify a preliminary timeline for the development of the Strategy.

3. SCOPE OF SERVICES

- 3.1** The following Services describe the project as it is currently envisioned:

Phase I

- Regular in-person meetings with City staff;
- Review and summary of existing urban forest management strategies and plans in other jurisdictions (e.g. regionally, provincially, nationally and internationally);
- Review and summary of best management practices for urban forestry regionally, provincially, nationally and internationally;
- Review and analyze existing City documents used in the management of the urban forest;
- Identify potential strategies for measuring the current status of the City's urban forest; and
- Completion of an interim report to be presented to the City's Environmental Sustainability Advisory Committee; the report should contain proposed directions for Phase II based on the above reviews.

Phase II

- Regular in-person meetings with City staff;
- Completion of an assessment and description of the current state of Surrey's urban forest;
- Development and implementation of a communications plan in coordination with the City's Marketing Division;
- Development of, and participation in, a community outreach and engagement strategy to facilitate input from the public and stakeholders;
- Development of goals, objectives and recommendations for the management of the urban forest
- Development of an action plan to implement the recommendations in the Strategy;
- Identification of strategies to complete a valuation of the City's urban forest;
- Completion of a publicly appealing policy document that provides a vision, objectives, recommendations and action plan for the City's urban forest.

- 3.2** All components of the Strategy must be based on best available practices that demonstrate and integrate transferrable, real-world standards and approaches.

4. RESPONDENT'S PREFERRED QUALIFICATIONS

4.1 The Respondent's team should consist of professionals with the following backgrounds:

- (a) Urban Forest Management;
- (b) Urban Forest Policy;
- (c) Arboriculture;
- (d) Landscape Architecture
- (e) Transportation Planning; and
- (e) Urban Planning.

Respondents may include other professional disciplines on their team as deemed appropriate to deliver the Services.

4.2 The Respondent's team should have the requisite expertise and relevant professional experience that will be required to undertake all the deliverables noted under Section 2: Project Objectives / Desired Outcomes and Section3: Scope of Services.

4.3 The Respondent should be able to demonstrate their ability to deliver a project of this scope on time and within budget.

4.4 Members of the Respondent's team should be in good standing with their respective professional associations where appropriate (e.g. BC Society of Landscape Architects).

4.5 The Respondent's team should have previous experience with, and a firm understanding of, urban forest management, arboriculture, community and land-use planning, landscape ecology, community consultation and stakeholder engagement.

4.6 The Respondent should be able to show examples of previous work that demonstrates their ability to provide innovative and creative approaches to developing municipal or regional strategies along with well formatted reports.

4.7 In addition to the above, the Respondent should demonstrate/provide the following:

- (a) Proven delivery of projects and ability to meet tight timelines;
- (b) Relevant experience of the proposed key personnel; and
- (c) Samples of previous reports demonstrating graphic design and writing styles.

5. Project Budget

The total budget for consultant services is \$150,000, including all disbursements and taxes.

[END OF PAGE]



SCHEDULE B – FORM OF SUBMISSION

**RESPONDENT’S REQUEST FOR EXPRESSION OF INTEREST
STATEMENTS OF QUALIFICATIONS**

Project Title: Pre-Qualification for URBAN FOREST MANAGEMENT STRATEGY

RFEOI/SOQ No.: 1220-050-2019-027

Submitted 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

Telephone: 604-590-7274

Fax: 604-599-0956

Email for PDF Files: purchasing@surrey.ca

SECTION A. GENERAL INFORMATION

This document is intended to provide information on the capacity, skill, and relevant experience and qualifications of the Respondent. Respondents may supplement information requested with additional sheets, if necessary.

1. _____
Full Legal Name of Firm

2. _____
Business Address

3. Business Phone No.: _____ Business Fax No.: _____
Business Email _____

4. Address: _____ Website Address: _____

5. Contact for prequalification inquiries (full name, position and email address):

6. Contact for general inquiries (full name, position and email address):

7. Membership of industry associations (please list, if any):

8. If the Respondent does not have an office within 100km of the City, please outline a strategy of operating in the Lower Mainland.

Comments:

SECTION B. COMPANY PROFILE

9. How many years has your organization been in business? _____

10. How many years has your organization been in business under its present business name?

11. Form of Business Organization (Legal Structure):

Corporation _____ Partnership _____ Sole Proprietorship _____

12. If Corporation/Partnership, year incorporated/established: _____

13. If the Respondent is a company, the company name indicated above is registered with the Registrar of Companies in the Province of British Columbia, Canada, Incorporation Number

_____.

SECTION C. RESPONDENT'S EXPERIENCE, REPUTATION AND RESOURCES

14. Respondents relevant experience and qualifications with projects of similar/comparable type and scope completed in the past five years. Describe why this experience is relevant to this project (Use the spaces provided in Schedule B – Appendix A and/or attach additional pages, if necessary).

15. Respondents relevant experience and qualifications with projects of similar/comparable type and scope underway as of Submission Date. Describe why this experience is relevant to this project (Use the spaces provided in Schedule B - Appendix B and/or attach additional pages, if necessary).

16. Respondent's demonstrated ability to provide the Services:

Comments:

17. Respondents should provide information on the background and experience of all key personnel proposed to undertake the project (e.g. Landscape Architecture, Registered Professional Biologist, Ecosystem Planner, Green Infrastructure Design, Graphic Designer/Visualization Specialist, etc.):

Please attach a resume of proven qualifications with evidence of past achievements on similar projects, including any past experience with the City of Surrey.

18. Subconsultants: Respondents should provide the following information on the background and experience of all subconsultants proposed to undertake a portion of the Services (use the spaces provided and/or attach additional pages, if necessary):

DESCRIPTION OF SERVICES	SUB-CONSULTANT NAME	YEARS OF WORKING WITH RESPONDENT	TELEPHONE NUMBER AND EMAIL

19. Respondents should provide details of the approach to the management of its subconsultants:

Comments:

SECTION D. TECHNICAL REFERENCE

20. Workers' Compensation Board Information:

Workers' Compensation Registration Number: _____

Letter of Good Standing attached: Yes No

21. Contracts:

- (a) Has your firm or any predecessor firm defaulted on a contract or had work terminated for non-performance within the last five (5) years? Yes No If "Yes", Respondent should briefly describe the project, owner, date and the circumstances/reason(s):

Comments:

- (b) Has the Respondent within the last 5 years been in a lawsuit regarding assignment performance, payments or scheduling? Yes No If "Yes", Respondent should briefly describe the list of assignment(s):

Comments:

- (c) Does the Respondent have experience with an innovative nature-based project that has failed to meet the expectations? Yes No If "Yes", Respondent should explain how the failure was remedied:

Comments:

22. Respondents should include a description of the general approach and methodology that the Respondent would take in performing the Services, including a narrative that illustrates how the Respondent will complete the scope of Services, manage the Services and accomplish required objectives on time and within budget. A high-level timeline should be included. The Respondent may choose to provide a conceptual sketch, infographic or diagram to visually represent the team's vision for this assignment on an 8.5" x 11" sheet of paper (attach additional pages, if necessary):

Comments:

- (a) Does the Respondent have sample reports demonstrating the Respondent's graphic design and writing styles?

Yes No If "Yes", please attached a copy(ies) of the reports.

23. Respondents should describe any difficulties or challenges you might anticipate in providing Services to the City and how you would plan to manage these:

Comments:

24. Respondent should list the categories of work that your organization normally performs with its own forces.

Comments:

25. Customer Service: Respondents should briefly describe your company's standards and associated process with respect to response time regarding resolution of service issues.

Comments:

26. What other information is not requested here but which you think the City should consider in evaluating your company?

Comments:

SECTION E. FINANCIAL REFERENCE

Insurance Reference:

27. Name of Insurance Company: _____

28. Business Address: _____

29. Contact Person: _____

30. Bus. Telephone/Fax Numbers: Phone: _____ Fax: _____

31. Are you able to provide General Liability Insurance, on an occurrence basis, in the amount of not less than \$5,000,000 (CAD) with an insurer licensed in British Columbia for bodily injury, (including death) and damage to property including loss of use thereof? Yes No

32. Do you carry Professional Errors and Omissions Insurance? Yes No If "Yes", provide the following details:

(i) Amount of coverage:

(a) Per Occurrence / Claim: _____

(b) Aggregate: _____

(ii) Detail specific exclusions (if any):

Comment:

(iii) Detail whether there is a limit on the number of claims per annum:

Comment:

Note: Refer also to the City's sample insurance certificate form available on the City's web site at www.surrey.ca (search "Insurance Certificates") titled City of Surrey Certificate of Insurance Standard Form.

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

This Submission is submitted this _____ day of _____, 2019.

I/We have the authority to bind the Respondent.

(Name of Respondent)

(Name of Respondent)

(Signature of Authorized Signatory)

(Signature of Authorized Signatory)

(Print Name and Position of Authorized Signatory)

(Print Name and Position of Authorized Signatory)

APPENDIX A

RELEVANT PROJECTS OF SIMILAR/COMPARABLE TYPE AND SCOPE COMPLETED IN THE PAST FIVE (5) YEARS (use the spaces provided and/or attach additional pages, if necessary):

Ref. #1. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): \$ _____ Final Contract Value: \$ _____
Project Manager: _____
Original Planned Completion Date: _____ Actual Completion Date: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____

Ref. #2. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): \$ _____ Final Contract Value: \$ _____
Project Manager: _____
Original Planned Completion Date: _____ Actual Completion Date: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____

Ref. #3. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): \$ _____ Final Contract Value: \$ _____
Project Manager: _____
Original Planned Completion Date: _____ Actual Completion Date: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____

APPENDIX B

RELEVANT PROJECTS OF SIMILAR/COMPARABLE TYPE AND SCOPE UNDERWAY AS OF SUBMISSION DATE (use the spaces provided and/or attach additional pages, if necessary):

Ref. #1. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): _____
Project Manager: _____
Scheduled Completion Date: _____ Percent (%) Completed: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____
Bus. E-Mail of Project Reference: _____

Ref. #2. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): _____
Project Manager: _____
Scheduled Completion Date: _____ Percent (%) Completed: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____
Bus. E-Mail of Project Reference: _____

Ref. #3. Project Title and Date: _____ **Date:** _____
Project Description: _____
Location of Project: _____
Original Contract Value (\$): _____
Project Manager: _____
Scheduled Completion Date: _____ Percent (%) Completed: _____
Name of Contract Owner: _____
Refer To: _____
Bus. Telephone/Fax Numbers: **Phone:** _____ **Fax:** _____
Bus. E-Mail of Project Reference: _____