



**Request for Proposals
For
Regulated Assessment Consulting Services**

Request for Proposals No.: **2023-FS-02**

Issued: **March 8, 2023**

Submission Deadline: **April 14, 2023, 2:00:00 PM (local time as determined conclusively by the clock located in the submission location)**

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PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

1.1 Invitation to Proponents

This Request for Proposals (the “RFP”) is an invitation by the City of Camrose (“the City”) to prospective proponents to submit proposals for **Regulated Assessment Consulting Services**, as further described in Section A of the RFP Particulars (Appendix D) (the “Deliverables”).

The City of Camrose is seeking Assessment Consulting Services to prepare the assessment of City properties that have a regulated Machinery & Equipment (M&E) Component for the 2024 tax year.

1.2 Bidding System Registration

All proponents must have a vendor account with the City’s electronic bidding system at:

<https://camrose.bidsandtenders.ca/Module/Tenders/en>

Proponents must be registered as a plan taker for this opportunity. This will enable the proponent to download the solicitation document, to ask questions, to receive addenda email notifications, download addenda, and submit their proposal electronically through the bidding system.

1.3 RFP Contact

To contact the City in relation to this RFP, proponents must initiate the communication electronically through the bidding system. The City will not accept any proponent’s communications by any other means, except as specifically stated in this RFP.

Questions related to this RFP are to be submitted through the bidding system only by clicking on the “Submit a Question” button for this specific opportunity.

All other communication in relation to this RFP, up to and including the submission of the proposal, must be through the bidding system, as described above.

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials or other representatives of the City, concerning matters regarding this RFP. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent’s proposal.

1.4 Type of Contract for Deliverables

The selected proponent will be requested to enter into direct contract negotiations to finalize an agreement with the City for the provision of the Deliverables. The terms and conditions found in the Form of Agreement (Appendix A) are to form the basis for commencing negotiations between the City and the selected proponent. It is the City’s intention to enter into an agreement with only one (1) legal entity.

The term of the agreement is to be for a period of one (1) year.

1.5 RFP Timetable

Issue Date of RFP	March 8, 2023
Deadline for Questions	March 31, 2023 [4:00 PM] local time
Deadline for Issuing Addenda	April 5, 2023 [4:00 PM] local time
Submission Deadline	(as defined on the first page)
Rectification Period	2 business days
Anticipated Ranking of Proponents	April 17, 2023
Contract Negotiation Period	10 calendar days

The RFP timetable is tentative only, and may be changed by the City at any time. For greater clarity, business days means all days that the City is open for business.

1.6 Submission of Proposals

1.6.1 Proposals to be Submitted at Prescribed Location

Proposals must be submitted electronically through the bidding system at:

<https://camrose.bidsandtenders.ca/Module/Tenders/en>

Submissions by other methods will not be accepted.

In the event of any technical issues, proponents should contact the bidding system's technical support at: support@bidsandtenders.ca.

1.6.2 Proposals to be Submitted on Time

Proposals must be finalized and fully uploaded in the bidding system on or before the Submission Deadline. The time of receipt of proposals shall be determined by the bidding system web clock. Late submissions will not be accepted by the bidding system and will be disqualified as late.

Proponents are cautioned that the timing of submission is based on when the proposal is received by the bidding system, not when a proposal is submitted by a proponent. As transmission can be delayed due to file transfer size, transmission speed or other technical factors, proponents should plan to submit proposals well in advance of the Submission Deadline to avoid submitting late due to technical issues. Proponents submitting near the Submission Deadline do so at their own risk.

The bidding system will send a confirmation email to the proponent advising when the proposal was submitted successfully. If you do not receive a confirmation email, contact the bidding system's technical support immediately at: support@bidsandtenders.ca.

1.6.3 Addenda Process in Electronic Submissions

Proponents shall acknowledge receipt of any addenda through the bidding system by checking a box for each addendum and any applicable attachment.

It is the responsibility of the proponent to have received all Addenda that are issued. Proponents should check the bidding system prior to submitting their proposal and up until the Submission Deadline in the event additional addenda are issued.

Addenda will typically be issued through the bidding system at least forty-eight (48) hours prior to the Submission Deadline. If necessary for the City to issue an addendum within forty-eight (48) hours prior to the Submission Deadline, the addendum will include an extension of the Submission Deadline.

If a proponent submits their proposal prior to the Submission Deadline, and an addenda is issued after the submission, the bidding system will automatically withdraw the proposal submission and the proposal status will change to an “incomplete status”. The proponent can view this status change in the “My Bids” section of the bidding system. “Incomplete status” means that the proposal has not been submitted and will not be evaluated by the City.

The proponent is solely responsible to:

- Make any required adjustments to their proposal; and
- Acknowledge the addenda; and
- Ensure the re-submitted proposal is received by the bidding system no later than the stated Submission Deadline.

The proponent accepts complete liability for ensuring the completeness of their proposal until the Submission Deadline. The City will not be responsible for the withdrawal of a proposal due to the failure to acknowledge any addenda issued prior to the Submission Deadline.

1.6.4 Proposals to be Submitted in Prescribed Format

Proposal materials should be prepared and submitted in accordance with the instructions in the bidding system, including any maximum upload file size.

1.6.5 Amendment of Proposals

Proponents may amend their proposals prior to the Submission Deadline in the bidding system. The proponent is solely responsible for ensuring that the amended proposal is received by the bidding system by the Submission Deadline.

1.6.6 Withdrawal of Proposals

At any time throughout the RFP process until the execution of a written agreement for provision of the Deliverables, a proponent may withdraw a submitted proposal. Prior to the Submission Deadline, proponents may withdraw a submitted proposal through the bidding system. The City is under no obligation to return withdrawn proposals after the Submission Deadline.

[End of Part 1]

PART 2 – EVALUATION, NEGOTIATION AND AWARD

2.1 Stages of Evaluation and Negotiation

The City will conduct the evaluation of proposals and negotiations in the following stages:

2.2 Stage I – Mandatory Submission Requirements

Stage I will consist of a review to determine which proposals comply with all of the mandatory submission requirements. If a proposal fails to satisfy all of the mandatory submission requirements, the City will issue the proponent a rectification notice identifying the deficiencies and providing the proponent an opportunity to rectify the deficiencies. If the proponent fails to satisfy the mandatory submission requirements within the Rectification Period, its proposal will be rejected. The Rectification Period will begin to run from the date and time that the City issues a rectification notice to the proponent. The mandatory submission requirements are set out in Section C of the RFP Particulars (Appendix D).

2.3 Stage II – Evaluation

Stage II will consist of the following two sub-stages:

2.3.1 Mandatory Technical Requirements

The City will review the proposals to determine whether the mandatory technical requirements as set out in Section D of the RFP Particulars (Appendix D) have been met. Questions or queries on the part of the City as to whether a proposal has met the mandatory technical requirements will be subject to the verification and clarification process set out in Part 3.

2.3.2 Rated Criteria

The City will evaluate each qualified proposal on the basis of the non-price rated criteria as set out in Section F of the RFP Particulars (Appendix D).

2.4 Stage III – Pricing

Stage III will consist of a scoring of the submitted pricing of each qualified proposal in accordance with the price evaluation method set out in Pricing (Appendix C). The evaluation of price will be undertaken after the evaluation of mandatory requirements and rated criteria has been completed.

2.5 Stage IV – Ranking and Contract Negotiations

2.5.1 Ranking of Proponents

After the completion of Stage III, all scores from Stage II and Stage III will be added together and the proponents will be ranked based on their total scores. The top-ranked proponent will receive a written invitation to enter into direct contract negotiations to finalize the agreement with the City.

2.5.2 Contract Negotiation Process

Any negotiations will be subject to the process rules contained in the Terms and Conditions of the RFP Process (Part 3) and will not constitute a legally binding offer to enter into a contract on the part of the City or the proponent and there will be no legally binding relationship created with any proponent prior to the execution of a written agreement. The terms and conditions found in the Form of Agreement (Appendix A) are to form the basis for commencing negotiations between the City and the selected proponent. Negotiations may include requests by the City for supplementary information from the proponent to verify, clarify or supplement the information provided in its proposal or to confirm the conclusions reached in the evaluation, and may include requests by the City for improved pricing or performance terms from the proponent.

2.5.3 Time Period for Negotiations

The City intends to conclude negotiations and finalize the agreement with the top-ranked proponent during the Contract Negotiation Period, commencing from the date the City invites the top-ranked proponent to enter negotiations. A proponent invited to enter into direct contract negotiations should therefore be prepared to satisfy the pre-conditions of award listed in Section E of the RFP Particulars (Appendix D), provide requested information in a timely fashion and conduct its negotiations expeditiously.

2.5.4 Failure to Enter into Agreement

If the pre-conditions of award listed in Section E of the RFP Particulars (Appendix D) are not satisfied or if the parties cannot conclude negotiations and finalize the agreement for the Deliverables within the Contract Negotiation Period, the City may discontinue negotiations with the top-ranked proponent and may invite the next-best-ranked proponent to enter into negotiations. This process will continue until an agreement is finalized, until there are no more proponents remaining that are eligible for negotiations or until the City elects to cancel the RFP process.

2.5.5 Notification of Negotiation Status

Other proponents that may become eligible for contract negotiations may be notified at the commencement of the negotiation process with the top-ranked proponent.

2.6 Defects or Irregularities

Notwithstanding anything set out herein including in relation to the Rectification Period, the City may elect at its sole discretion to accept or reject any proposal and to waive any defect, irregularity, or mistake in any proposal and to accept or reject any proposal or alternative proposal, in whole or in part, which it deems to be most advantageous to its interests.

As part of the negotiations described above, the City may, prior to and after contract award, negotiate changes to the scope of work, the type of materials, the specifications or any conditions with or one or more of the proponents without having any duty or obligation to advise any other proponent or to allow them to vary their proposal as a result of such changes and the City shall have no liability to any other proponent as a result of such negotiations or modifications.

[End of Part 2]

PART 3 – TERMS AND CONDITIONS OF THE RFP PROCESS

3.1 General Information and Instructions

3.1.1 Proponents to Follow Instructions

Proponents should structure their proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a proposal should reference the applicable section numbers of this RFP.

3.1.2 Proposals in English

All proposals are to be in English only.

3.1.3 No Incorporation by Reference

The entire content of the proponent's proposal should be submitted in a fixed form, and the content of websites or other external documents referred to in the proponent's proposal but not attached will not be considered to form part of its proposal.

3.1.4 References and Past Performance

In the evaluation process, the City may include information provided by the proponent's references and may also consider the proponent's past performance or conduct on previous contracts with the City or other institutions. In addition, the City in its sole and unfettered discretion, may disqualify a proponent who has previously been (or is presently) involved in litigation, arbitration, or any other dispute resolution process or quasi-judicial process in which it is taking a position that is adverse in interest to the City.

3.1.5 Information in RFP Only an Estimate

The City and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or issued by way of addenda. Any quantities shown or data contained in this RFP or provided by way of addenda are estimates only, and are for the sole purpose of indicating to proponents the general scale and scope of the Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

3.1.6 Proponents to Bear Their Own Costs

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

3.1.7 Proposal to be Retained by the City

The City will not return the proposal or any accompanying documentation submitted by a proponent.

3.1.8 No Guarantee of Volume of Work or Exclusivity of Contract

The City makes no guarantee of the value or volume of work to be assigned to the successful proponent. The agreement to be negotiated with the selected proponent will not be an exclusive contract for the provision of the described Deliverables. The City may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

3.2 Communication after Issuance of RFP

3.2.1 Proponents to Review RFP

Proponents should promptly examine all of the documents comprising this RFP, and may direct questions or seek additional information in writing by submitting a question through the bidding system on or before the Deadline for Questions. The City is under no obligation to provide additional information, and the City is not responsible for any information provided by or obtained from any other source. It is the responsibility of the proponent to seek clarification on any matter it considers to be unclear. The City is not responsible for any misunderstanding on the part of the proponent concerning this RFP or its process.

3.2.2 All New Information to Proponents by Way of Addenda

This RFP may be amended only by addendum in accordance with this section. If the City, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all proponents by addendum. Should the City issue an addendum to the RFP, it will be posted only on the City's electronic bidding system. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by the City. Proponents should confirm the receipt of all addenda within the bidding system.

3.2.3 Verify, Clarify and Supplement

When evaluating proposals, the City may request further information from the proponent or third parties in order to verify, clarify or supplement the information provided in the proponent's proposal, including but not limited to clarification with respect to whether a proposal meets the mandatory technical requirements set out in Section D of the RFP Particulars (Appendix D). The City may revisit, re-evaluate and rescore the proponent's response or ranking on the basis of any such information.

3.3 Notification and Debriefing

3.3.1 Notification to Other Proponents

Once an agreement is executed by the City and a proponent, the other proponents will be notified by public posting, in the same manner that this RFP was originally posted, of the outcome of the procurement process.

3.3.2 Debriefing

Proponents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the City at purchasing@camrose.ca and must be made within thirty (30) days of such notification.

3.4 Conflict of Interest and Prohibited Conduct

3.4.1 Conflict of Interest

For the purposes of this RFP, the term “Conflict of Interest” includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFP process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of the City in the preparation of its proposal that is not available to other proponents, (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process), or (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive RFP process or render that process non-competitive or unfair; or
- (b) in relation to the performance of its contractual obligations under a contract for the Deliverables, the proponent’s other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

3.4.2 Disqualification for Conflict of Interest

The City may disqualify a proponent for any conduct, situation or circumstances, determined by the City, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above.

3.4.3 Disqualification for Prohibited Conduct

The City may disqualify a proponent, rescind an invitation to negotiate or terminate a contract subsequently entered into if the City determines that the proponent has engaged in any conduct prohibited by this RFP.

3.4.4 Prohibited Proponent Communications

Proponents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration on the bidding system.

3.4.5 Proponent Not to Communicate with Media

Proponents must not at any time directly or indirectly communicate with the media in relation to this RFP or any agreement entered into pursuant to this RFP without first obtaining the written permission of the City.

3.4.6 No Lobbying

Proponents must not, in relation to this RFP or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the successful proponent(s).

3.4.7 Illegal or Unethical Conduct

Proponents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion. Proponents must not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials or other representatives of the City; deceitfulness; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this RFP.

3.4.8 Past Performance or Past Conduct

The City may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the supplier to honour its submitted pricing or other commitments; or
- (c) any conduct, situation or circumstance determined by the City, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

3.5 Confidential Information

3.5.1 Confidential Information of the City and FOIP

All information provided by or obtained from the City in any form in connection with this RFP either before or after the issuance of this RFP

- (a) is the sole property of the City and must be treated as confidential;
- (b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract for the Deliverables;
- (c) must not be disclosed without prior written authorization from the City; and

(d) must be returned by the proponent to the City immediately upon the request from the City.

All proposals submitted to the City become the property of the City in their entirety. Submissions and the information contained within will be held in confidence as much as is reasonably possible and subject to the disclosure provisions contained in the Freedom of Information and Protection of Privacy Act (FOIP Act). The successful proponent acknowledges that the FOIP Act applies to all information or records, as defined in the FOIP Act, which are collected or created for the purposes of the Agreement and within the successful proponent's custody or control.

3.5.2 Confidential Information of Proponent

A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the City. The confidentiality of such information will be maintained by the City, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by the City to advise or assist with the RFP process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted on the bidding system.

3.6 Procurement Process Non-binding

3.6.1 No Contract A and No Claims

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

- (a) this RFP will not give rise to any Contract A–based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and
- (b) neither the proponent nor the City will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract or failure to honour a proposal submitted in response to this RFP.

3.6.2 No Contract until Execution of Written Agreement

This RFP process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service will be created between the proponent and the City by this RFP process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

3.6.3 Non-binding Price Estimates

While the pricing information provided in proposals will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the proposals and the ranking of the proponents. Any inaccurate, misleading or incomplete information, including

withdrawn or altered pricing, could adversely impact any such evaluation or ranking or the decision of the City to enter into an agreement for the Deliverables.

3.6.4 Cancellation

The City may cancel or amend the RFP process without liability at any time.

3.6.5 Limitation of Liability

Notwithstanding any other provision, by submitting a proposal, each proponent agrees that any claim the proponent may have against the City and the City's employees, agents, consultants and elected officials (collectively the "City Parties") for damages, losses, or expenses or for any other legal relief, arising, directly or indirectly, under or in relation to this RFP process (whether in contract, tort, or other legal theory) is limited to an amount equal to the proponent's actual and reasonable costs in preparing its proposal to a maximum of \$2,500.00. For clarity, each proponent specifically waives as against the City Parties any claim for loss of profit or anticipated profit, loss of opportunity, loss of reputation, consequential or indirect losses or for judicial review or injunctive relief.

3.7 Governing Law and Interpretation

These Terms and Conditions of the RFP Process (Part 3):

- (a) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
- (c) are to be governed by and construed in accordance with the laws of the province of Alberta and the federal laws of Canada applicable therein and each proponent irrevocably and unconditionally attorns to the jurisdiction of the courts of the Judicial District of Edmonton in relation to any claim or dispute in relation to this RFP.

[End of Part 3]

APPENDIX A – FORM OF AGREEMENT

The Proponent shall provide a copy of the Proponent's Standard Agreement for review by the City. The City may sign the Proponent's Agreement or supply a Standard City Agreement to be signed by the awarded Proponent.

[End of Appendix A]

APPENDIX B – SUBMISSION FORM

(To be acknowledged in the bidding system)

1. Acknowledgment of Non-binding Procurement Process

The proponent acknowledges that the RFP process will be governed by the terms and conditions of the RFP, and that, among other things, such terms and conditions confirm that this procurement process does not constitute a formal, legally binding bidding process (and for greater certainty, does not give rise to a Contract A bidding process contract), and that no legal relationship or obligation regarding the procurement of any good or service will be created between the City and the proponent unless and until the City and the proponent execute a written agreement for the Deliverables.

2. Ability to Provide Deliverables

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required. The proponent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the RFP for the rates set out in its proposal.

3. Non-binding Pricing

The proponent has submitted its pricing in accordance with the instructions in the RFP and in Pricing (Appendix C) in particular. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

4. No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this RFP.

5. Disclosure of Information

The proponent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the City to the advisers retained by the City to advise or assist with the RFP process, including with respect to the evaluation this proposal.

APPENDIX C – PRICING

1. Instructions on How to Provide Pricing

- a) Proponents should provide the information requested under section 3 below (“Required Pricing Information”) within the pricing table in the bidding system. The proponent may attach further details of the pricing in their submission, however the pricing recorded in the bidding system will be used in the evaluation.
- b) Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for **GST**, which should be itemized separately. All pricing information must be fully disclosed with all charges clearly defined.
- c) Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all freight and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

2. Evaluation of Pricing

Pricing is worth 30 points of the total score.

Pricing will be scored based on a relative pricing formula using the rates set out in the pricing form. Each proponent will receive a percentage of the total possible points allocated to price for the particular category it has bid on, which will be calculated in accordance with the following formula:

$$\text{lowest price} \div \text{proponent's price} \times \text{weighting} = \text{proponent's pricing points}$$

3. Required Pricing Information (to be completed in the bidding system)

The following pricing shall be completed in the Appendix C Pricing Table:

- Please provide all fees and/or charges which would be expected to be incurred carrying out the deliverables taking into consideration the estimated amount of M&E assessment and number of properties.
- Please provide the hourly rate for additional services as outlined in the deliverables.
- Please feel free to address any other potential services not specifically mentioned in the RFP that may be of benefit to the City of Camrose as an optional service.

APPENDIX D – RFP PARTICULARS

A. THE DELIVERABLES

The City is seeking Assessment Consulting Services for City properties that have a regulated Machinery & Equipment (M&E) Component for the 2024 tax year. The intent is for the work to be completed by December 1, 2023.

The scope includes but is not limited to the following:

1. Review annual assessment of Non-DIP M&E inventory.
 - Assessment roll currently contains 12 properties with Non-DIP M&E assessed at a total of approximately \$14,000,000
2. Conduct exterior inspection of Non-residential areas in the City of Camrose to identify other properties that may contain M&E assessment. The total amount of all non-residential improved properties in the City is 370. It is estimated that an additional 15-20 properties with some M&E component may be identified.
 - Prepare assessment of M&E assessment for any properties identified. Shall include documentation necessary to enter into CAMA system

Proponents are asked to provide information on their approaches to Assessment Consulting Services and work plans. This may be provided by showing your knowledge of the process and approach through the following information:

- Understanding and awareness of applicable regulations
- Knowledge of workplans / time required to complete these assessments
- Communication strategies to work with the City and identified stakeholders
- Additional information as required to convey the breadth, depth and knowledge of your organization in providing assessment consulting services for properties containing M&E.

The estimated number of properties and the total M&E assessment above are provided as a guideline and may change throughout the term of the agreement based on the need of the City.

Proponents are advised to provide their hourly rates in the event either of the following services are required:

- Additional properties containing M&E are identified for assessment.
- The Manager of Assessment requires assistance at a CARB or court challenges to the assessed values of the M&E properties.

B. MATERIAL DISCLOSURES

N/A

C. MANDATORY SUBMISSION REQUIREMENTS

1. Submission Form (Appendix B)

Proponents shall refer to the terms and conditions section of the bidding system to acknowledge and agree to the terms of the Submission Form (Appendix B).

2. Pricing (Appendix C)

Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

3. Other Mandatory Submission Requirements

- Proponent must be a member in good standing of the Alberta Assessors Association
- A Letter of Account for the Prospective Consultant's Workers' Compensation Board (WCB) coverage

D. MANDATORY TECHNICAL REQUIREMENTS

N/A

E. PRE-CONDITIONS OF AWARD

- Proof of registration with the Alberta Assessors Association
- Professional liability in the amount of \$2,000,000 and general liability in the amount of \$2,000,000 per occurrence. The City is to be named as an additional insured on the general liability insurance with respect to work conducted by the successful proponent or their resources for this project.
- City of Camrose Business License

F. RATED CRITERIA

The following sets out the categories, weightings and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Rated Criteria Category	Weighting (Points)
i. Experience and Qualifications	30
ii. References	10
iii. Overview and Scope of Work	30
Pricing (See Appendix C for details)	30
Total Points	100

Suggested Proposal Content for Non-Price Criteria

i. Experience and Qualifications

Each proponent should provide the following in its proposal:

- a. a brief description of the proponent;
- b. a description of its knowledge, skills and experience relevant to the Deliverables; and
- c. the roles and responsibilities of the proponent and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise.
- d. Demonstrate experience and expertise at valuing complex properties with an M&E component

ii. References

Each proponent is requested to provide three (3) references from clients who have obtained services similar to those requested in this RFP from the proponent in the last **five (5)** years within the bidding system.

iii. Overview and Scope of Work

Each proponent should provide the following in its proposal:

- a. Response to the deliverables presented,
- b. Methodologies and work plan,
- c. Quality of response and detail provided.

2023-FS-02 - Regulated Assessment Consulting Services

Opening Date: March 8, 2023 11:00 AM

Closing Date: April 14, 2023 2:00 PM

Schedule of Prices

The Bidder hereby Bids and offers to enter into the Contract referred to and to supply and do all or any part of the Work which is set out or called for in this Bid, at the unit prices, and/or lump sums, hereinafter stated.

* Denotes a "MANDATORY" field

Do not enter \$0.00 dollars unless you are providing the line item at zero dollars to the Municipality.

If the line item and/or table is "NON-MANDATORY" and you are not bidding on it, leave the table and/or line item blank. Do not enter a \$0.00 dollar value.

Appendix C - Pricing

How to Provide Pricing

- a. Respondents should submit their pricing information electronically within the bidding system.
- b. Rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for **GST**, which should be itemized separately.
- c. Unless otherwise indicated in the requested pricing information, rates quoted by the respondent must be all-inclusive and must include all labour and material costs, all freight and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

Description	Price (excludes GST)	Details
Provide total fees and/or charges which would be expected to be incurred carrying out the deliverables taking into consideration the estimated amount of M&E assessment and number of properties		
Hourly rate for additional services (Additional services may include additional properties are identified for assessment or the Manager of Assessment requires assistance at a CARB or court challenge to the assessed values of the M&E properties)		
Optional: Value added service (identify service and price)		
Optional: Value added service (identify service and price)		
Optional: Value added service (identify service and price)		

Bid Questions

The Bidder shall answer the question(s) below

Provide the anticipated dates the service will occur:

All references stated shall be for the same or similar scope as the one described in this Bid.

For newly formed business entity including, corporations, partnerships and sole proprietors or a Contractor teaming arrangement you shall state below in the Client Column that you were not the "Contractor" for the named project and should state whose past experience on the named project is relevant to that reference.

The Municipality may contact the bidder's references.

References

Each proponent is requested to provide three (3) references from clients who have obtained similar services within the last five (5) years within the table. With each reference, proponents shall include the municipality's name, address, phone number and the name and position of a person that the City may contact.

Line Item	Client Company Name *	Contact Name & Position *	Contact Information (Address, Phone Number, Email) *	Service Details and Year Provided *
1				
2				
3				

Addenda, Terms and Conditions

The Bidder hereby acknowledges and agrees:

1. To provide all goods, services and construction, as more specifically set out and in accordance with the City's Bid Call Document, including but not limited to the scope of work, specifications, drawings, Addenda (if issued by the City), the terms and conditions, etc. stated therein, which are expressly acknowledged and made part of this Contract.
2. This Bid is made without any connections, knowledge, comparison of figures or arrangements with any other company, firm or person making a Bid for the same Work and is in all respects fair and without collusion or fraud.
3. I/WE do hereby Bid and offer to enter into a Contract to do all the Work as specified in the Bid Call Document(s) which shall include all costs but not limited to; freight, duty, currency, etc. in accordance with the prices and terms as submitted by the Bidder herein.
4. If I/WE withdraw this Bid before the formal Contract is executed by the Awarded Bidder for the said Work for Ninety (90) Calendar Days, whichever event first occurs, the amount of the Bid Deposit accompanying this Bid (if applicable to this bid) shall be forfeited to the City.
5. If the Bid is accepted, I/WE agree to provide all required documentation, as required by the Bid Call Document(s) within Ten (10) Calendar Days after notification of Award.
6. I/We acknowledge and agree that any issued Addendum/Addenda forms part of the Bid Call Document.

I/WE (including any related or affiliated entities and any principal thereof) have no unresolved litigation with the City.

I/WE agree to be bound by the terms and conditions and have authority to bind the Corporation and submit this Bid on behalf of the Bidder.

Bidders must declare all potential Conflicts of Interest. This includes disclosing the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (a) participated in the preparation of the bid; **AND** (b) were employees of the City within twelve (12) months prior to the Submission Deadline.

If the bidder declares an actual or potential Conflict of Interest, the bidder must set out details of the actual or potential Conflict of Interest below:

Yes **No**

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document

Please check the box in the column "**I have reviewed this addendum**" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
There have not been any addenda issued for this bid.		