



REQUEST FOR PROPOSAL

RFP 2024-08

October 24, 2024

**Municipal Engineering Consultants
Rotational Roster 2025-2027**

City of Duncan, Engineering Department
Attention: Brian Murphy, Director, Public Works and Engineering
City of Duncan, 200 Craig Street
Duncan, BC V9L 1W3

Submission Deadline: November 28, 2024 at 2:00 p.m. Pacific Standard Time

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**RFP 2024-08
MUNICIPAL ENGINEERING CONSULTANTS
ROTATIONAL ROSTER 2025-2027**

DEFINITIONS

“**CONTRACTOR or CONSULTANT**” means the Proponent whose Proposal has been accepted by the City of Duncan and is awarded a contract by the City of Duncan to carry out the Work.

“**CoD**” means the City of Duncan.

“**PROPONENT**” means the responder to this RFP.

“**PROPOSAL**” means a proposal to carry out the Work submitted by a Proponent in response to this RFP.

“**RFP**” means this Request for Proposal.

“**WORK**” means and includes anything, and everything required to be done for fulfillment and completion of the project in accordance with this RFP and Proposal.

1.0 - INTRODUCTION

1.1 PURPOSE

This RFP is an invitation by the CoD to prospective proponents to submit proposals for the City of Duncan Municipal Engineering Consultants Rotational Roster 2025-2027.

The CoD’s Engineering Department (the Department) has a variety of projects identified in its capital budget and maintenance programs and is requesting proposals from consulting engineers / engineering firms to participate in studies, design work, and project management. Work will include preparation of plans, specifications, designs (ranging from conceptual to Issued for Construction), cost estimates and project management for various projects as they relate to the installation, renewal, or enhancement of municipal infrastructure.

1.2 OBJECTIVES

The intent of this program is to address studies and designs that are beyond the normal scope or expertise of Department staff or when the number of projects exceeds the available capacity of the Department.

The Department intends to have a list of between three (3) and six (6) prequalified Consultants in each service category to complete studies and designs.

The City’s Municipal Engineering Consultants Rotational Roster (the Roster) features various categories of consultant services routinely utilized by the Engineering Department. Each service category has an associated specific discipline of services. For

inclusion on the Roster, the Proponent must adequately document the firm's experience and competence in performing the scope of work within that service category, as outlined in section 4.0 of this RFP.

The service categories are listed below and detailed in section 4.3 Terms of Reference of this RFP:

- A – Civil Engineering
- B – Transportation Planning and Engineering
- C – Structural Engineering
- D – Geotechnical Engineering and Material Testing
- E – Electrical Engineering (including SCADA)
- F – Project Management Services

2.0 - INSTRUCTIONS TO PROPONENTS

2.1 SUBMISSION OF PROPOSALS

The Proposals and their envelopes should be clearly marked with the name and address of the Proponent and the RFP program title. The sealed envelope should be addressed to the project contact:

**Brian Murphy, Director of Public Works and Engineering
City of Duncan
200 Craig Street
Duncan, BC V9L 1W3
Office: 250-746-6126**

Alternately, electronic proposals may be submitted to:

bmurphy@duncan.ca

Proposals should be received on or before the **Closing Time** of:

**TIME: 2:00 p.m. Pacific Standard Time
DATE: November 28, 2024**

It is the Proponent's sole responsibility to ensure its Proposal is received at the mailing or email address set out above by the Closing Time. Hard copies (3) of the Proposal to the above address are requested to follow at the same time or within 2-3 business days following the Closing Time. Electronic submissions are to be in PDF format.

Proponents wishing to make changes to their Proposals after submission but prior to the Closing Time may do so by submitting the revisions by email or hard copy. It is the Proponent's sole responsibility to ensure the revisions are received by the CoD prior to the Closing Time.

2.2 INQUIRIES

Proponents must carefully examine the RFP documents and shall fully inform themselves as to the intent, existing conditions and limitations which may affect their Proposal submission. No consideration will be given after submission of a Proposal to any claim that there was any misunderstanding with respect to the conditions imposed.

Proponents finding discrepancies or omissions in the Contract or RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the above listed project contact. If there are any changes, additions, or deletions to the Proposal scope, conditions, or closing date, Proponents will be advised by means of an Addendum issued by CoD. All Addenda are to become part of the Proposal Documents and receipt of Addenda should be acknowledged by the Proponent in the submission.

Verbal discussion between CoD Council members or staff and a Proponent shall not become a part of the RFP or modify the RFP unless confirmed by written Addendum.

3.0 - GENERAL TERMS OF PROPOSAL PROCESS

3.1 PROPOSAL PREPARATION COSTS

All expenses incurred by the Proponent in preparation and submission of this Proposal are to be borne by the Proponent, with the express understanding that no claims for reimbursements against CoD will be accepted. CoD shall not be responsible for any costs involved in or associated with any meetings, discussion, or negotiation following submission that could lead to acceptance of the Proposal and award of a contract.

3.2 PROPOSAL EVALUATION

CoD recognizes that "Best Value" is the essential part of purchasing a product and/or service and therefore CoD may prefer a Proposal with a higher price, if it offers greater value and better serves CoD's interests, as determined by CoD, over a Proposal with a lower price. Appendix A contains the information regarding how Proposals will be evaluated. The evaluation team will not be limited to the criteria listed in Appendix A, and the evaluation team may consider other criteria that the team identifies as relevant during the evaluation process. However, any criteria considered will be applied evenly and fairly to all Proposals.

CoD, at its sole discretion, reserves the right to:

- Reject any or all Proposals whether complete or not;
- Reject any Proposal it considers not in its best interests;
- Waive any minor irregularity or insufficiency in the Proposal submitted;
- Not be liable for misunderstandings or errors in the Request for Proposals;
- Issue addenda to the Request for Proposals;
- Contact references provided by the Proponents;
- Retain independent persons or contractors for assistance in evaluating Proposals;
- Request points of clarification to assist CoD in evaluating Proposals;
- Negotiate changes with the successful Proponent; and
- Withdraw the Request for Proposals.

3.3 PROPOSAL PRESENTATION

CoD reserves the right to request one or more of the Proponents, whose submissions are of particular interest to CoD, to make oral presentations to CoD.

3.4 PROPOSAL CONFIDENTIALITY AND PROPRIETARY INFORMATION

All submissions become the property of CoD and will not be returned to the Proponent. CoD will consider all Proposals submitted as confidential but reserves the right to make copies of all Proposals received for its internal review and for review by its financial, accounting, legal, and technical consultants.

Proponents should be aware that CoD is a “public body” as defined in and subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

If the Proponent believes any of the information requested in this RFP and provided by them is confidential, then they should identify it as such and provide a rationale as to why it should not be released under “Freedom of Information” legislation.

The rationale for keeping information confidential under this legislation includes:

- a) Trade secrets of the Proponent;
- b) Financial, commercial, scientific, or technical information, the disclosure of which could reasonably be expected to result in material financial loss or gain or could reasonably be expected to prejudice the competitive position of the Proponent;
or
- c) Information the disclosure of which could be reasonably expected to interfere with contractual or other negotiations of the Proponent.

3.5 CONFLICT OF INTEREST

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with CoD, its elected or appointed officials or employees, and any property ownership direct or indirect in the jurisdiction. CoD may rely on such disclosure.

3.6 NO COLLUSION

Except as otherwise specified or as arising by reason of the provision of the contract documents, no person whether natural, or body corporate, other than the Proponent has or will have any interest or share in this Proposal or in the proposed contract which may be completed in respect thereof. There is no collusion or arrangement between the Proponent and any other actual or prospective Proponents in connection with Proposals submitted for this project and the Proponent has no knowledge of the contents of other Proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the Proposal.

3.7 LITIGATION

Proponents who, either directly or indirectly through another corporation or entity, have been or are in litigation, or who have served notice with intent to proceed with court action against CoD in connection with any contract for works or services, may be considered ineligible Proponents. Receipt of Proposals from such Proponents may be disqualified from the evaluation process.

3.8 NO CONTRACT

This RFP is not a tender and does not commit CoD in any way to select a preferred Proponent. By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contractual, tort, or other legal obligation of any kind is formed under or imposed on CoD by this RFP or submissions prior to the completed execution of a formal written Contract.

3.9 ACCEPTANCE OF PROPOSAL

The acceptance of a Proposal will be made in writing from CoD and will be addressed to the successful Proponent at the address given in the submitted Proposal. Following acceptance and approval to proceed with the Proposal, the Proponent is expected to enter into a contract with CoD to perform the works or services set out and agreed upon in the Proposal.

The agreement that the successful Proponent will be expected to execute with CoD will contain terms similar to those contained in the MMCD Standard Client Consultant Agreement. The agreement attachments will include the entire Request for Proposal, the Proponent's total Proposal submission and any mutually agreed upon modifications, changes or negotiated adjustments.

3.10 PROPOSAL CONTENT

Content to be included in the Proposal, but not limited to:

- Full name, address and telephone number of the submitting office of the Proponent and where applicable, the name, address and telephone number of any branch office, affiliate or sub-consultant(s) that will be involved in the project.
- Primary Contact / Project Manager: The Proposal should identify the proposed project manager who will be the single point of contact, responsible for direct interaction with CoD. State their position and professional discipline. Describe the work to be performed by the project manager, their qualifications and substantive experience directly related to the proposed Work.
- Proposed Project Team: The Proposal should list key individuals including the project manager who will have major responsibilities for the performance of the Work. Describe the work to be performed by each listed individual and their qualifications in terms of education and substantive experience directly related to the proposed project. The Proposal must include the following endorsement:

“Identified Key Project Team members shall only be replaced with written approval of the CoD.”

- **Methodology:** The Proposal shall contain an outline of strategies and skills that will be used to manage the project’s expectations, resources, budget, and quality control. Discuss how each task will be carried out and what services or interaction is required from/with CoD. Suggest alternatives, if appropriate. Identify any specialized equipment, unique approaches, concepts, or cost saving measures which your company may use relevant to the required services.
- **References:** The Proposal should provide no less than three (3) project references that are relevant to the proposed Work. The references should be from a third party who can provide information about the performance of the Proponent in delivering services for the experience cited.

3.11 SUBMISSION REQUIREMENTS AND EVALUATION CRITERIA

The information included in the Proponent’s submission will be used as the basis for evaluation.

No assumptions should be made that information regarding the Proponent or its participants, their experience, expertise, and performance on other projects is known, other than the documentation and responses submitted by the Proponent.

Proponents must submit a **Corporate Proposal** for their firm with separate sections for each **service category** for which they are applying. (e.g. A – Civil and C – Structural).

3.12 SUB-CONTRACTORS

The Proposal shall include the company name of all sub-contractors and sub-consultants proposed to be used in the performance of the Work with a description of the work they would be performing.

The sub-contractors and sub-consultants listed in the Proposal may not be changed without the written consent of CoD. If CoD so requires, the Proponent shall be prepared to confirm to CoD the competence of sub-contractors and sub-consultants prior to acceptance of the Proposal.

3.13 PROPOSAL CONTENT & INNOVATION

The Proponent should address in the Proposal submission all the information as requested in the RFP documentation. The Proponent is also encouraged to include innovative, alternative or unique solutions to the Proposal subject that may, along with other things, indicate cost initiatives, improved environmental impacts, better public relations and/or project acceptance, reduced risk, improved management or administrative efficiencies, etc. Any alternative Proposals submitted should include all the requirements of the original RFP with costs identified for comparative purposes.

3.14 WORKERS COMPENSATION ACT

The Proponent, and any proposed sub-contractors and sub-consultants, should provide a WorkSafe BC (Workers Compensation Board) Registration Number in the Proposal and shall at the time of signing a contract agreement, provide proof of payment of claims in good standing with WorkSafe BC.

4.0 - SCOPE OF WORK AND SCHEDULE

4.1 STATEMENT OF UNDERSTANDING

In their own words, the Proponent must show that they understand what the Work involves and what is required to complete the project. It is the Proponent's responsibility to demonstrate that they possess the required knowledge, understanding, and capacity to carry out the Work as outlined in this RFP.

4.2 EXTRA WORK – PRICING

The proposal should include a schedule of fees and disbursements as to adequately perform the Work and satisfy the Terms of Reference. In addition, a schedule of hourly rates should be included to be used in the event of unforeseen extra work. It is suggested that this schedule should include, but not be limited to, the following:

- a) Hourly rates of all office and professional staff etc.
- b) Hourly rates of all field staff etc.
- c) Hourly or unit rates of all equipment
- d) Disbursements rate if applicable

All prices shall be in Canadian Funds and are to show taxes (if applicable) separately.

4.3 TERMS OF REFERENCE

MUNICIPAL ENGINEERING CONSULTANTS ROTATIONAL ROSTER

Within each service category, Consultants that pre-qualify will be placed on a rotational list for projects for which fees are estimated not to exceed \$65,000. The City may use approved Consultants from the pre-qualified list for a particular service category for contracts that fit the general scope without having to advertise the project or seek competitive bids. Consultants will be selected based upon their demonstrated expertise and approved status along with their ability to complete assigned projects within budget and on schedule.

Consultants selected for the Rotational Consultants List will remain on the list for a period of three (3) years unless the key personnel or firm competency changes from the original approved status. The City reserves the right to periodically require approved Consultants to refresh their status by asking some or all the approved Consultants to reapply. The City reserves the right to designate additional service categories as required (in this event, the City will re-employ the pre-qualification process).

Approved Consultants must comply with all City requirements and Bylaws. Scope of work, price, and other specific contract provisions will be negotiated with selected Consultants. The City is under no obligation to enter into a contract with approved Consultants.

The City will continue to use RFP's for consultant services estimated to cost more than \$60,000. The City may choose to use other selection procedures for projects under \$60,000 rather than use the Rotational Consultant Program.

The City reserves the right to select any prequalified Consultant from the Rotational Consultants List if, in the City's opinion, that Consultant has unique skills that are required for a specific project. In this rare circumstance, this will be considered the firm's next project in the rotation.

Application And Approval Process

To be approved for the Rotational Consultant List, the Proponent must adequately demonstrate the firm's experience and capability in performing the general scope of work for the Service Category. Selection will depend upon the applicant's ability to provide brief but specific descriptions of relevant projects and service history for the firm and its key personnel. A significant part of the evaluation and scoring will be based on CoD staff's evaluation of recent past experiences with the Proponent, including interactions with CoD where the Proponent represented a developer or third party.

Note that the proposal evaluations will include a social procurement component which can include local and regional employment, addressing barriers to employment, and providing local and regional economic and community benefits. Proponents must complete the Social Value Questionnaire (Appendix B).

Key Personnel and Project History

Applicants must provide qualifications of key personnel and list up to three (3) projects performed by each of the key personnel listed. These projects may be by the applicant firm, or in a previous employment capacity. The project description must directly relate to the service category's scope of work. Key personnel identified in the application must be permanent, regular employees of the applicant firm. Temporary or contract employees or sub-consultant/contractors may not be used to demonstrate key personnel experience but may be listed for reference.

Applicants must designate a team lead or team manager to act as the single point of contact for the duration of the program.

Consultants are required to update the City whenever key personnel change for the Consultant within each service category.

Pricing

Proponents must provide pricing and rates by category of personnel and disbursements for each year that will be 2025, 2026, and 2027

Additional Information

Provide brief statements of business information not covered above.

Rotational Selection Process

Pre-qualified Consultants will be placed on a list that will be managed by the Engineering Department. Consultants will normally be selected on a rotating basis unless, in the City's opinion, a specific Consultant has unique skills that are required for a specific project.

- Approved Consultants will be listed in a random order on the initial roster.
- The Consultant at the top of the list will be issued an outline of work and given "first right of refusal" to decline the project due to current workloads and/or inability to meet the City's timelines or deliverables.
- If declined, the City will select the next Consultant from the approved list, in order, until the work is accepted and awarded.
- The Consultant will be given a second opportunity to provide the service for the next project.
- If the second opportunity is declined, the Consultant will lose their spot in the rotation and be moved to the bottom of the list.
- When selected from the rotational list, the Consultant shall provide the City with the following;
 1. Name(s) of staff assigned to the project and any sub-consultants who will be used on the project. These selections must be consistent with the Consultant's key personnel in the service category.
 2. Detailed scope of work and methodology.
 3. Design schedule.
 4. Upset fee amount including all taxes and disbursements.

If the City's opinion is that the fee amount is excessive, or if the proposed personnel do not match the City's expectations, arrangements will be made by staff to seek a bid from the next firm on the list. The City reserves the right to negotiate and award a contract to another Prequalified Consultant for any reason.

General Objectives

The Consultant will provide, as required, engineering services for projects assigned by the City. The scope of work for a project will vary within each service category and be articulated through an Outline of Work submitted by the City.

The Consultant will:

- Work with staff throughout the development of the designs or reports.
- Provide professional guidance and advice in the best interest of the City of Duncan as required.
- Analyze various reports and designs to provide a professional opinion.
- Provide project design/construction plans, specifications, and cost estimates.

- Complete field locates and acquire third party utility information directly from the principal utility company (Telus, BC Hydro, FortisBC, Fiber-Optics, CoD utilities, etc.) as required to ensure correct and updated drawing information.
- Produce reports or letters supporting the completion of the assigned task.
- The engineer responsible for design shall provide sealed/stamped drawings.

Documentation

- Final reports are to be provided, preferably in an 8 1/2" x 11" format in PDF and hardcopy (if requested).
- All final documents, modeling data, and AutoCAD drawings are to be submitted in both hard copy and on electronic media.
- All utility modeling data will be supplied in the format that the modeling software uses (WaterCAD and PCSWMM or as otherwise specified by the City).
- All drawings will be submitted in AutoCAD with AutoCAD 2021 being the oldest acceptable version. The Consultant must incorporate the City's block and layering conventions into all drawings.
- Drawings must use the coordinate system specified by the City.
- A single drawing file should be submitted for each project. This drawing should have a single model space with multiple layout views if more than one sheet is required.
- All other electronic data that the Consultant will submit to the City must be in a format acceptable to the Engineering Department.

Reporting Structure

The Consultant will report to the Director of Public Works and Engineering or their delegate.

The intent of the roster is to combine the staff and expertise of the Engineering Department with that of the Consultant. This team will provide sound engineering designs and ensure that all options have been explored.

Process Guidelines

The Engineering Department will prepare an Outline of Work to be performed by the Consultant. The outline may include the following sections:

- a) **Background** – outlining the project or study and why it is required.
- b) **Objectives** – outlining what the project or study aims to achieve.
- c) **References** – listing any supporting information or documentation that can be provided by the Engineering Department to help the Consultant with the project.
- d) **Schedule** – stating when the project needs to be completed.

- e) **Consultant's Submission** – listing what the Engineering Department needs for the submission.
- f) **Contact Person** – The name of the Engineering Department staff person responsible for the project.

The City will specify a timeframe for response and the Consultant will be given a minimum of five (5) full working days to respond. Submissions beyond the specified timeframe may not be accepted. The Consultant will be required to provide a detailed fee estimate to perform the work. Each estimate submitted must include a description of the work to be done, along with a breakdown of the hours to be worked and by whom (including hourly rates) and an estimated time schedule to complete the required work. Any claim for payment over the estimate would be considered an extra and would be subject to prior approval. The City may, at its own discretion, continue future phases of the project(s) with the Consultant chosen, on a direct negotiation basis utilizing the rates supplied.

Performance Standards

To ensure that the City receives the highest quality performance standards for the consulting services, the following procedures may be used to monitor each contract.

- When appropriate, depending on the nature of the contract, City staff and the Consultant should have a debriefing meeting. This meeting is intended to review the Consultant's performance.
- The Director of Public Works and Engineering or the Manager of Engineering will manage the debriefing and reporting process.
- Consultants may be evaluated on their performance for each contract. In the event any Consultant receives two (2) reports that demonstrate lack of contract compliance and performance, they may be removed from the rotational list for that service category for a period of up to 12 months. A further unsatisfactory report may result in full removal from the rotational list.

Service Categories

A – Civil Engineering

- Utility Modeling and Design (sewer, stormwater, and water projects)
- Road and Sidewalk Design Projects
- Detailed Surveys (construction surveys)
- Preparation of tender and contract documents (using MMCD Standard Platinum Edition)
- Construction Management and Site Review (using MMCD Standard Platinum Edition)
- Infrastructure studies
- Development and maintenance of Design and Construction standards
- Identification and assistance with development and modification of pertinent bylaws
- Site design
- Project cost estimating
- Grant writing

B – Transportation Planning and Engineering

- Transportation Engineering (e.g. road safety audits, signal coordination review and design, parking usage studies, small impact studies, bus stop improvements)
- Street Improvements (e.g. Functional, preliminary or detailed design of road construction, widening and/or realignment projects, bus stop improvements)
- Street lighting and traffic signal design
- Cycling and Pedestrian Facilities Design including Multi-Use Pathways
- Active Transportation and Traffic Calming Initiatives
- Traffic Management Plans
- Project cost estimating

C – Structural Engineering

- Analysis and design of existing structures (sidewalk vaults, street light bases and municipal buildings)
- Retaining Wall or Rock Wall Assessment or Design
- Parks Facilities and Structures
- Building Design
- Seismic Assessment and Design
- Project cost estimating

D – Geotechnical Engineering and Material Testing

- Geotechnical analysis services (conducting soil sampling, slope stability, materials testing and construction project inspection and testing)
- Retaining Wall or Rock Wall Assessment or Design

E – Electrical Engineering (Including Scada)

- Power Supply and Electrical Kiosk Design
- Building and Site Design
- Fire Systems
- Security Systems
- Control Systems / SCADA
- Back-up Power Systems
- Energy Systems and Accounting
- Project cost estimating
- Street lighting assessments and design
- Electrical Installation Permit application

F – Project Management Services

- Assistance with project scope definition and development;
- Assistance with project team and resource planning;
- Assistance with identifying and applying for grant funding;
- Assistance with public-at-large, stakeholder groups, other authorities having

jurisdiction, municipal staff, neighbouring municipalities and the Regional District, provincial authorities, other consultation and reporting processes;

- Assistance with project costing, value analysis and milestone scheduling;
- Managing construction implementation for conformity with the approved design, including detailed scheduling and coordination, management of inspections, project status reports, administration of construction changes, approvals of progress claims, completion certificates, management of deficiency and warranty work, commissioning, operating manuals and record documentation;
- Acting as owner's representative;
- Project risk analysis and management;
- Managing project approvals and permits;
- Visiting project sites, reviewing and recording existing site conditions;
- Managing of project design documents, ensuring design conformity with agreed project requirements and budget, and administering design changes;
- Suggesting alternatives, evaluating them, and assisting the City in deciding between them so as to best meet the City's needs in terms of scope, time, quality and cost;
- Project contract administration; and
- Chairing regular project meetings with stakeholders and providing meeting minutes.
- NOTE: Individual qualified consultants may apply under this category if not represented by an engineering firm.

5.0 - COMMUNICATIONS

Regular updates to CoD project contact are required throughout the project.

6.0 - FEES AND DISBURSEMENTS

Proponents must provide pricing and rates by category of personnel and disbursements for each year that is 2025, 2026, and 2027.

NOTE TO ALL BIDDERS: The City of Duncan may negotiate with the prospective Consultant(s) prior to signing a contract.



RFP 2024-08
October 24, 2024

APPENDIX A

Request for Proposal Evaluation Form

APPENDIX A

REQUEST FOR PROPOSAL EVALUATION FORM

Proponent's Name: _____			
Project Title: Municipal Engineering Consultants Rotational Roster 2025-2027			
Evaluation Date: _____			
Evaluator: _____			
Step 1:		YES	NO
Basic Attributes	Proposal received prior to closing		
	Sub-consultant list submitted		
	Project Manager identified		
	Reference List		
	Hourly rates provided		
	Complete proposal as requested		
Step 2:		Assigned Points	Points
Proponent	Qualifications and experience of firm and project team members	30	
	Past Performance / References (including Staff evaluation of past performance with CoD)	30	
Proposal	Overall proposal	5	
	Social Value Questionnaire	5	
Price	Points for Price = (lowest cost Proposal divided by Proposal being evaluated) x (% weight)	30	
Total Score	Proponent + Proposal + Price Scores	100	

Pricing may be calculated based on a sample project and/or by comparison of a Senior Project Engineer hourly rate or similar role.



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APPENDIX B

Social Value Questionnaire



APPENDIX B: SOCIAL VALUE QUESTIONNAIRE

Complete the following questionnaire as a means for the City of Duncan to assess the social component of your bid. Each question asks for a yes or no answer. If you answer “yes” you may be required to submit evidence along with your bid to support or verify your answer. Required documentation is clearly outlined in each question and must be complete in order to receive points.

General Information on the proponent:

Company name: _____

Date questionnaire completed: _____ (YYYY-MM-DD)

RFP #: _____

Section 1 – Employment

1. Does your organization currently have strategies or policies around inclusive employment practices to ensure you are providing employment opportunities for equity-deserving groups or persons facing barriers to employment?

Examples of equity-deserving groups include, but are not limited to, youth, Indigenous people, women, 2SLGBTQ+, racialized minorities, people with disabilities, and people with experience of homelessness.

Yes

No

Please describe in a few sentences your current processes for implementing your strategies/policies, and ensuring employment opportunities for equity-deserving groups.

Scoring

(Yes, with evidence - 3 points)

(Yes, without evidence - 0 points)

(No - 0 points)

2. Do you have a living wage policy or certification?

Yes

No

If yes, please attach the policy or your living wage certification.

Scoring

(Yes, with verification - 3 points)

(Yes, without verification - 0 points)

(No - 0 points)

3. Do you provide extended health and dental benefits to your employees?

Yes

No

If yes, please identify your provider.

Scoring

(Yes, with provider - 3 points)

(Yes, without provider - 0 points)

(No - 0 points)

4. Where applicable, do you plan to hire local employees to work on this project?

Yes

No

Scoring

(Yes - 3 points)

(No - 0 points)

Section 1: Employment Question	Maximum Points	Response Score
1.1	3	
1.2	3	
1.3	3	
1.4	3	
Total	12	

Section 2 – Social Value in the Supply Chain

1. Do you have a 3rd party certification that shows you are a diverse or socially inclusive business? Certification could be from any of the following organizations verifying that you are a social enterprise, your social impact, or membership of any organization verifying diverse ownership.

- 3rd party certification/verification that verifies that the business is owned by:
 - Indigenous People
 - Women
 - 2SLGBTQ+
 - Racialized minorities
 - Businesses owned by individuals with a recognized disability.
- Social enterprise or social purpose business

Yes

No

If yes, please attach proof of third-party verification (indicating document name in the space below)

Examples of certifying organizations include:

- Canadian Aboriginal & Minority Supplier Council (CAMSC)
- Canadian Council for Aboriginal Business (CCAB)
- Canadian Gay and Lesbian Chamber of Commerce (CGLCC)
- Inclusive Workplace and Supply Council of Canada (IWSCC)
- National Gay and Lesbian Chamber of Commerce (NGLCC)
- National Minority Supplier Development Council (NMSDC)
- WBE Canada (WBE)
- WeConnect International (WCI)
- Women’s Business Enterprise National Council (WBENC)
- Buy Social Canada Social Enterprise Certification
- B Corporation

Scoring

(Yes, with third-party verification - 3 points)

(Yes, without third-party verification - 0 points)

(No - 0 points)

2. Does your organization practice social procurement? Social procurement is intentionally seeking to leverage social value from your supply chain. This could be by buying from small businesses, local businesses, diverse-owned businesses, social enterprises, and businesses who support your social value creation goals.

Yes

No

If yes, please attach the relevant policy (indicating document name in the space below) or describe the implementation of social procurement in your supply chain.

Scoring

(Yes, with evidence - 3 points)

(Yes, without evidence - 0 points)

(No - 0 points)

Section 2: Social Value in the Supply Chain Question	Maximum Points	Response Score
2.1	3	
2.2	3	
Total	6	

Section 3 – Community Development

1. In the last three years, has your organization implemented any programs or initiatives to ensure greater economic opportunity and community benefits for the Cowichan Valley Community?

Yes

No

If yes, please provide details of any programs or initiatives.

Scoring

(Yes, with evidence - 3 points)

(Yes, without evidence - 0 points)

(No - 0 points)

2. Do you plan on completing any initiatives in the Cowichan Valley as part of this project related to community development and benefits? (e.g., park and public space improvements, public art, heritage conservation and awareness, environmental and habitat improvements, new or expanded local offices, or Indigenous reconciliation initiatives.)

Yes

No

If yes, please provide details of any programs or initiatives.

Scoring

(Yes, with description - 3 points)

(Yes, without description - 0 points)

(No - 0 points)

Section 3: Community Development	Maximum Points	Response Score
3.1	3	
3.2	3	
Total	6	

Total Score Social Procurement Questionnaire

Section	Maximum Points	Response Score
Section 1: Employment	12	
Section 2: Social Value in the Supply Chain	6	
Section 3: Community Development	6	
Total	24	

Definitions

Apprentices: Employment Social Development Canada definition: An apprentice is a paid employee, registered with the regional apprenticeship authority, who works under the supervision of a certified journeyman to learn their skilled trade and fulfill all requirements established by their province or territory.

Diverse-owned Business: A business that is majority owned, operated, and controlled by a member of one of the following diverse groups: Indigenous community; members of a visible minority group; immigrants and refugees; people with recognized disabilities; racialized communities; women; members of the 2SLGBTQ+ community.

Equity-deserving Groups: Also referred to as equity-seeking groups, groups who have historically been denied equal access to employment, education, and other opportunities and includes, without limitation, the following: members of an Indigenous community; members of a visible minority group; immigrants and refugees; people with recognized disabilities; racialized communities; youth; women; members of the 2SLGBTQ+ community; low-income residents; people with mental or physical health barriers; people facing employment barriers, unemployment or underemployment; and others experiencing barriers to economic opportunity and participation.

Indigenous Businesses: A business which is 51%, or more, owned, operated, and controlled by individuals who identify as Indigenous or by First Nations by an Indigenous first nation band, Metis community, or government.

Person Experiencing Homelessness: Employment and Social Development Canada, *Reaching Home: Canada's Homelessness Strategy Directives* definition: Homelessness is the situation of an individual or family who does not have a permanent address or residence; the living situation of an individual or family who does not have stable, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it.

Person with a Disability: Self-identified; Disability in Canada is indicated by one or more of the following; being blind, being markedly restricted in at least one of the basic activities of daily life, being significantly restricted in two or more of the basic activities of daily life (including vision impairment) or by requiring life-sustaining therapy. Daily life activities are

speaking, hearing, walking, eliminating (bowel or bladder functions), feeding, dressing, or mental functions necessary for everyday life.

Racialized Minorities: Self-identified.

Recent Immigrants: Self-identified; Statistic Canada definition: refers to a person who obtained a landed immigrant or permanent resident status up to five years prior to a given census year.

Social Enterprise: A business that sells goods or services, embeds a social, cultural, or environmental purpose into the business, and reinvests the majority of profits into their social mission.

Socially Inclusive Business: A business who seeks to create economic opportunities for groups who have historically been denied equal access to employment, education, and other opportunities and includes; members of an Indigenous community; members of a visible minority group; immigrants and refugees; people with recognized disabilities; racialized communities; women; members of the 2SLGBTQ+ community; low-income residents; people with mental or physical health barriers; people facing employment barriers, unemployment or underemployment; and others experiencing barriers to economic opportunity and participation.

Social Procurement: Every purchase has a social, economic, and environmental impact. Social procurement is about using your existing purchasing to capture those impacts to achieve overarching institutional, governmental, or individual goals that helps shape inclusive, vibrant, and healthy communities.

Veterans: Any former member of the Canadian Armed Forces who successfully underwent basic training and is honorably released.

Women: Self-identified.

Youth: Youth Policy – Government of Canada, Privy Council Office definition: young workers up to age 29.