



Request For Proposals 2019-1 Signage Project

WAYFINDING & INTERPRETIVE SIGNAGE PROJECT

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PART 1 – INTRODUCTION

1.1 Invitation to Proponents

This Request for Proposals (“RFP”) is an invitation by Swan Lake Christmas Hill Nature Sanctuary Society (The SOCIETY) to prospective proponents to submit proposals for the provision of signage services, as further described in Part 2 – The Deliverables (the “Deliverables”) and in Appendices E and E(1).

Swan Lake Christmas Hill Nature Sanctuary is a wild oasis in the heart of the urban landscape and includes two distinct ecosystems: the beautiful marshland of Swan Lake and the rocky, oak-forested highlands of Christmas Hill. Both are home to an incredible array of native plants and wild animals.

Managed by a non-profit society, this urban refuge provides an exceptional opportunity to bring people and nature together. The Sanctuary is a living classroom fostering an understanding and appreciation of nature through direct experiences. Fast approaching its 45th anniversary in 2020, the Society continues to be regarded as a principal centre for nature education and protection in the heart of the city. Educational programs for all ages encourage responsibility for the care and protection of the natural environment.

For the purposes of this procurement process, “The SOCIETY Contact” shall be: Kathleen Burton, Executive Director at kburton@swanlake.bc.ca

1.2 Type of Contract for Deliverables

The selected proponent will be requested to enter into negotiations for an agreement with the SOCIETY for the provision of the Deliverables. It is the SOCIETY’s intention to enter into an agreement with only one (1) legal entity. The term of the agreement is to be for a period sufficient to complete the deliverables. The SOCIETY retains the option to extend the agreement on the same terms and conditions for an additional term to facilitate additional work, to be determined following the completion of the deliverables. It is anticipated that the agreement will be executed on or around the first week in November 1, 2019.

1.3 No Guarantee of Volume of Work or Exclusivity of Contract

The SOCIETY 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 SOCIETY may contract with others for the same or similar Deliverables to those described in the RFP or may obtain the same or similar Deliverables internally.

1.4 Trade Agreements

Proponents should note that procurements falling within the scope of [British Columbia trade agreements](#) and [Federal trade agreements](#) are subject to those trade agreements, but that the rights and obligations of the parties shall be governed by the specific terms of each particular tender call. For further information on BC trade or Federal trade visit the appropriate website.

PART 2 – THE DELIVERABLES

2.1 Description of Deliverables

The RFP is an invitation to submit offers for the provision of signage services, as further described in Appendix E – RFP Particulars – Section A. The Deliverables as well as in Appendix E(1).

2.2 Material Disclosures

Proponents should refer to Appendix E – RFP Particulars – Section B. Material Disclosures as well as Appendix E (1).

PART 3 – EVALUATION OF PROPOSALS

3.1 Timetable and Submission Instructions

Proponents should submit their proposals according to the following timetable and instructions.

3.1.1 Timetable

| | |
|------------------------------|---|
| Issue Date of RFP | September 9, 2019 |
| Deadline for Questions | September 19, 2019 |
| Deadline for Issuing Addenda | September 24, 2019 |
| Submission Date | 3:00 pm (Pacific time), October 7, 2019 |
| Rectification Date | October 14, 2019 |

Invited proponents may be requested to participate in shortlisted provider presentations tentatively scheduled for the fourth week in October in Victoria, British Columbia.

The RFP timetable is tentative only, and may be changed by The SOCIETY at any time.

3.1.2 Proposals Should Be Submitted in Prescribed Manner

Proposals should be submitted at: 3873 Swan Lake Road, Victoria, BC V8X 3W1

Proponents should submit one (1) electronic copy and two (2) hard copies in a sealed, opaque package.

Proposals are to be prominently marked with the RFP title and number (see RFP cover), with the full legal name and return address of the proponent, and with the Submission Date.

In the event of a conflict or inconsistency between the hard copy and the electronic copy of the proposal, the hard copy of the proposal shall prevail.

3.1.3 Proposals Should Be Submitted in Prescribed Manner at Prescribed Location

Proposals should be submitted at the location set out above on or before the Submission Date. Proposals submitted after the Submission Date will be rejected.

A proponent may, at its option, email the SOCIETY contact prior to the Submission Date with delivery details, including the anticipated arrival time of its proposal. In the event a proposal does not arrive as scheduled, the SOCIETY may provide those proponents who have given such prior notice one additional Business Day to effect the delivery of their proposals. The Submission Date shall be deemed to be adjusted accordingly for the purpose of accepting those proposals. For the purposes of this Section, "Business Day" means any working day between 8:30 a.m. and 4:00 p.m., Monday to Friday inclusive, but excluding statutory and other holidays that the SOCIETY has elected to be closed for business.

3.1.4 Withdrawing Proposals

At any time throughout the RFP process, a proponent may withdraw a submitted proposal. To effect a withdrawal, a notice of withdrawal must be sent to the SOCIETY Contact and must be signed by an authorized representative. The SOCIETY is under no obligation to return withdrawn proposals.

3.2 Stages of Proposal Evaluation

The SOCIETY will conduct the evaluation of proposals in the following three (3) stages:

3.2.1 Stage I

Stage I will consist of a review to determine which proposals comply with all of the mandatory requirements. Proposals failing to satisfy the mandatory requirements as of the Submission Date will be provided an opportunity to rectify any deficiencies. Proposals failing to satisfy the mandatory requirements as of the Rectification Date will be excluded from further consideration.

3.2.2 Stage II

Stage II will consist of a scoring by the SOCIETY of each qualified proposal on the basis of the rated criteria.

3.2.3 Stage III

Stage III will consist of a scoring of the pricing submitted. The evaluation of price will be undertaken after the evaluation of mandatory requirements and any rated requirements has been completed.

3.2.4 Cumulative Score

At the conclusion of Stage III, all scores from Stage II and Stage III will be added and the highest ranking proponent will be selected for contract negotiations in accordance with Part 4.

3.3 Stage I – Mandatory Requirements, Submission and Rectification

3.3.1 Submission and Rectification Date

Other than inserting the information requested on the mandatory submission forms set out in the RFP, a proponent may not make any changes to any of the forms. Proponents submitting proposals that do not meet the mandatory requirements will be provided an opportunity prior to the Rectification Date to rectify any deficiencies.

3.3.2 Submission Form (Appendix B)

Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.

3.3.3 Rate Bid Form (Appendix C)

Each proponent must include this form completed according to the instructions contained in the form as well as those instructions set out below:

- a) rates shall be provided in Canadian funds, inclusive of all applicable duties and taxes except for sales taxes, which should be itemized separately; and
- b) rates quoted by the proponent shall be all-inclusive and shall include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery to the SOCIETY, 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. Rate details should be provided separately for each section of Appendix E and E(1).

3.3.4 Reference Form (Appendix D)

Each proponent must complete the Reference Form (Appendix D) and include it with its proposal.

3.3.5 Rectification Date

Proposals satisfying the mandatory requirements before the Rectification Date will proceed to Stage II. Proposals failing to satisfy the mandatory requirements will be excluded from further consideration.

3.4 Stage II

Evaluation of Rated Criteria Proponents should refer to Appendix E – RFP Particulars – Section D. Rated Criteria for a breakdown of the Rated Criteria.

3.5 Stage III

Evaluation of Pricing Proponents should refer to the Rate Bid Form at Appendix C and Appendix E – RFP Particulars – Section D. Pricing.

3.6 Cumulative Score and Selection of Highest Scoring Proponent

At the conclusion of Stage III, all scores from Stage II and Stage III will be added together and the highest ranked proponent will be selected for negotiations in accordance with Part 4 – Terms and Conditions of the RFP process.

PART 4 – TERMS AND CONDITIONS OF THE RFP PROCESS

4.1 General Information and Instructions

4.1.1 Proponents to Follow Instructions

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

4.1.2 Proposals in English

All proposals are to be in English.

4.1.3 Institution's Information in RFP Only an Estimate

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

4.1.4 Proponents Shall Bear Their Own Costs

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

4.2 Communication after Issuance of RFP

4.2.1 Proponents to Review

RFP Proponents shall promptly examine all of the documents comprising the RFP, and

(a) shall report any errors, omissions or ambiguities; and

(b) may direct questions or seek additional information; in writing by email on or before the proponent's Deadline for Questions to the SOCIETY Contact.

All questions submitted by proponents by email to the SOCIETY Contact shall be deemed to be received once the email has entered into the SOCIETY Contact's email inbox. No such communications are to be

directed to anyone other than the SOCIETY Contact. The SOCIETY is under no obligation to provide additional information. It is the responsibility of the proponent to seek clarification from the SOCIETY Contact on any matter it considers to be unclear. The SOCIETY shall not be responsible for any misunderstanding on the part of the proponent concerning the RFP or its process.

4.2.2 All New Information to Proponents by Way of Addenda

The RFP may be amended only by an addendum in accordance with this section. If the SOCIETY, for any reason, determines that it is necessary to provide additional information relating to the RFP, such information will be communicated to all proponents by addenda. Each addendum forms an integral part of the RFP.

Such addenda may contain important information, including significant changes to the RFP. Proponents are responsible for obtaining all addenda issued by the SOCIETY.

In the Submission Form (Appendix B), proponents should confirm their receipt of all addenda by setting out the number of each addendum in the space provided.

4.2.3 Post-Deadline Addenda and Extension of Submission Date

If any addendum is issued after the Deadline for Issuing Addenda, the SOCIETY may at its discretion extend the Submission Date for a reasonable amount of time.

4.2.4 Verify, Clarify and Supplement

When evaluating responses, the SOCIETY 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. The SOCIETY may revisit and re-evaluate the proponent's response or ranking on the basis of any such information.

4.2.5 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 will not be considered to form part of its proposal.

4.2.6 Proposal to Be Retained by THE SOCIETY

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

4.3 Negotiations, Notification and Debriefing

4.3.1 Selection of Top-Ranked Proponent

The top-ranked proponent, as established under Part 3 – Evaluation of Proposals, will receive a written invitation to enter into direct contract negotiations with the SOCIETY.

4.3.2 Timeframe for Negotiations

The SOCIETY intends to conclude negotiations within thirty (30) days commencing from the date the SOCIETY invites the top-ranked proponent to enter negotiations. A proponent invited to enter into direct contract negotiations should therefore be prepared to provide requested information in a timely fashion and to conduct its negotiations expeditiously.

4.3.3 Process Rules for Negotiations

Any negotiations will be subject to the process rules contained in this Part 4 – Terms and Conditions of RFP Process and the Submission Form (Appendix B) and will not constitute a legally binding offer to enter into a contract on the part of the SOCIETY or the proponent.

Negotiations may include requests by the SOCIETY 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 SOCIETY for improved pricing from the proponent.

4.3.4 Terms and Conditions

The terms and conditions found in the Form of Agreement (Appendix A) are to form the starting point for negotiations between the SOCIETY and the selected proponent. Page 14 of 27.

4.3.5 Failure

4.3.5 Failure to Enter Into Agreement

Proponents should note that if the parties cannot execute a contract within the allotted thirty (30) days, the SOCIETY may invite the next-best-ranked proponent to enter into negotiations. In accordance with the process rules in this Part 4 – Terms and Conditions of RFP Process and the Submission Form (Appendix B), there will be no legally binding relationship created with any proponent prior to the execution of a written agreement.

With a view to expediting contract formalization, at the midway point of the above-noted timeframe, the SOCIETY may elect to initiate concurrent negotiations with the next-best-ranked proponent.

Once the above-noted timeframe lapses, the SOCIETY may discontinue further negotiations with that particular proponent. This process shall continue until a contract is formalized, until there are no more proponents remaining that are eligible for negotiations or until the SOCIETY elects to cancel the RFP process.

4.3.6 Notification to Other Proponents

Other proponents that may become eligible for contract negotiations will be so notified at the commencement of the negotiation process. Once a contract is executed between the SOCIETY and a proponent, the other proponents may be notified directly in writing and shall be notified by public posting in the same manner that the RFP was originally posted of the outcome of the procurement process and the award of the contract.

4.3.7 Debriefing

Proponents may request a debriefing after receipt of a notification of award. All requests must be in writing to the SOCIETY Contact and must be made within sixty (60) days of notification of award. The intent of the debriefing information session is to aid the proponent in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

4.3.8 Bid Protest Procedure

If a proponent wishes to challenge the outcome of the RFP process, it should provide written notice to the SOCIETY Contact within sixty (60) days of notification of award, and the SOCIETY will respond in accordance with its bid protest procedures.

4.4 Prohibited Communications and Confidential Information

4.4.1 Prohibited Proponent Communications

The proponent shall not engage in any Conflict of Interest communications and should take note of the Conflict of Interest declaration set out in the Submission Form (Appendix B).

For the purposes of this Section, "Conflict of Interest" shall have the meaning ascribed to it in the Submission Form (Appendix B).

4.4.2 Proponent Not to Communicate with Media

A proponent may not at any time directly or indirectly communicate with the media in relation to the RFP or any contract awarded pursuant to the RFP without first obtaining the written permission of the SOCIETY Contact.

4.4.3 Confidential Information of Institution

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

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

(d) shall be returned by the proponents to THE SOCIETY immediately upon the request of the SOCIETY.

4.4.4 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 SOCIETY. The confidentiality of such information will be maintained by the SOCIETY, 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 the SOCIETY's advisers retained for the purpose of evaluating or participating in the evaluation of their proposals. If a proponent has any questions about the collection and use of personal information pursuant to the RFP, questions are to be submitted to the SOCIETY Contact.

4.5 Procurement Process Non-binding

4.5.1 No Contract A and No Claims

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

(a) the RFP shall 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 SOCIETY shall have the right to make any breach of contract, tort or other claims against the other with respect to the award of a contract, failure to award a contract or failure to honour a response to the RFP.

4.5.2 No Contract until Execution of Written Agreement

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

4.5.3 Non-binding Price Estimates

While the pricing information provided in responses will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the responses and the ranking of the proponents. Any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation, ranking or contract award.

4.5.4 Disqualification for Misrepresentation

The SOCIETY may disqualify the proponent or rescind a contract subsequently entered if the proponent's response contains misrepresentations or any other inaccurate, misleading or incomplete information.

4.5.5 References and Past Performance

The SOCIETY's evaluation may include information provided by the proponent's references and may also consider the proponent's past performance on previous contracts with the SOCIETY or other institutions.

4.5.6. Inappropriate Conduct

The SOCIETY may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, and such inappropriate conduct shall include but not be limited to the following:

- (a) the submission of quotations containing misrepresentations or any other inaccurate, misleading or incomplete information;
- (b) the refusal of the supplier to honour its pricing or other commitments made in its proposal; or
- (c) any other conduct, situation or circumstance, as solely determined by the SOCIETY, which constitutes a Conflict of Interest.

For the purposes of this Section, "Conflict of Interest" shall have the meaning ascribed to it in the Submission Form (Appendix B).

4.5.7 Cancellation

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

4.6 Governing Law and Interpretation

4.6.1 Governing Law

The terms and conditions in this Part 4 – Terms and Conditions of RFP Process

- (a) are included for greater certainty and are intended to be interpreted broadly and separately (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive (and shall 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 British Columbia and the federal laws of Canada applicable therein.

APPENDIX A – FORM OF AGREEMENT

Proponents shall include a proposed terms of engagement document that the SOCIETY and the successful proponent will use as the basis of the negotiation phase of the contract development process.

APPENDIX B – SUBMISSION FORM 1.

Proponent Information

Please fill out the following form, and name one person to be the contact for the RFP response and for any clarifications or amendments that might be necessary.

Full Legal Name of Proponent: _____

Any Other Relevant Name under Which the Proponent Carries on Business: _____

Street Address: _____

City, _____ Province/State: _____

Postal Code: _____ Phone Number: _____

Fax Number: _____ Company Website: _____

RFP Contact Person and Title _____ RFP Contact Phone: _____

RFP Contact Facsimile _____ RFP Contact E-mail: _____

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 that there will be no legal relationship or obligations created until the SOCIETY and the selected proponent have executed a written contract.

Ability to Provide Deliverables

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. The proponent represents and warrants its ability to provide the Deliverables required under the RFP in accordance with the requirements of the RFP for the Rates set out in the Rate Bid Form and has provided a list of any subcontractors to be used to complete the proposed contract. The proponent encloses herewith as part of the proposal the mandatory forms set out below:

: Page 15 of 27 FORM INITIAL TO ACKNOWLEDGE Proposed Terms of Engagement Submission Form Rate Bid Form Reference Form Notice to proponents: There may be forms required in the RFP other than those set out above. See the Mandatory Requirements section of the RFP for a complete listing of mandatory forms.

Non-binding Price Estimates

The proponent has submitted its Rates in accordance with the instructions in the RFP and in the Rate Bid Form set out in Appendix C. 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 quotation or its eligibility for future work.

Addenda

The proponent is deemed to have read and accepted all addenda issued by the SOCIETY prior to the Deadline for Issuing Addenda. The onus remains on proponents to make any necessary amendments to their proposal based on the addenda. The proponent is requested to confirm that it has received all addenda by listing the addenda numbers or, if no addenda were issued, by writing the word “None” on the following line: _____.

Proponents who fail to complete this section will be deemed to have received all posted addenda.

Conflict of Interest

For the purposes of this section, the term “Conflict of Interest” means

(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 SOCIETY 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 RFP process; or

(b) in relation to the performance of its contractual obligations contemplated in the contract that is the subject of this procurement, 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.

If the box below is left blank, the proponent will be deemed to declare that

(a) there was no Conflict of Interest in preparing its proposal; and

(b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the following *italicized* statement applies, check the box.

The proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP. If the proponent declares an actual or potential Conflict of Interest by marking the box above, the proponent must set out below details of the actual or potential Conflict of Interest:

The following individuals, as employees, advisers, or in any other capacity (a) participated in the preparation of our proposal; AND (b) were employees of the SOCIETY or Volunteer of the SOCIETY and have ceased that employment within twelve (12) months prior to the Submission Date:

Name of Individual: _____

Affiliation with the SOCIETY: _____

Perceived conflict with the SOCIETY: _____

Last Date of paid or volunteer employment with the SOCIETY: _____

Name of last Supervisor or contact: _____

Brief Description of Individual's Job Functions: _____

Brief Description of Nature of Individual's Participation in the Preparation of the Proposal: _____

(Repeat above for each identified individual)

The proponent agrees that, upon request, the proponent shall provide the SOCIETY with additional information from each individual identified above in the form prescribed by the SOCIETY.

7. 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 if required by order of a court or tribunal. The proponent hereby consents to the disclosure, on a confidential basis, of this proposal by the SOCIETY to the SOCIETY's advisers retained for the purpose of evaluating or participating in the evaluation of this proposal.

Signature of Proponent

Name and Title Date: I have authority to bind the proponent

Signature of Witness

Representative Name of Witness

APPENDIX C – RATE BID FORM

Please complete for sections 2-5 of Appendix E (1)—price each section separately, exclusive of HST.
Prepare this detailed pricing form for each of the 4 projects outlined in Appendix E (1) Fixed Project.

Costs (detail): _____ Estimated Variable Project Costs Materials and Shipping _____

Installation: _____ Shop Drawing Fees _____ Consulting/Survey Fees _____

Design Fees _____ Project Management Fees _____ Fabrication Fees _____

Warranty Fees _____ Permit Fees _____ Subcontractor Fees (detail) _____

Other (detail) _____ Total Estimated Variable Project Costs _____ TOTAL PROJECT

COSTS: _____

Please also outline the hourly rate for any work that may be requested outside of scope of this Request for Proposal or the associated response document.

APPENDIX D – REFERENCE FORM Each proponent is requested to provide three (3) references from clients who have obtained similar goods or services to those requested in the RFP from the proponent in the last three (3) years.

Reference #1

Company Name: _____

Company Address: _____

Contact Name: _____

Contact Telephone Number: _____

Date Work Undertaken: _____

Nature of Assignment: _____

Reference #2

Company Name: _____

Company Address: _____

Contact Name: _____

Contact Telephone Number: _____

Date Work Undertaken: _____

Nature of Assignment: _____

Reference #3

Company Name: _____

Company Address: _____

Contact Name: _____

Contact Telephone Number: _____

Date Work Undertaken: _____

Nature of Assignment: _____

APPENDIX E – RFP PARTICULARS

A. THE DELIVERABLES

The objective of this Request for Proposal is to receive proposals from interested respondents able to provide signage services as outlined in Appendix E(1).

B. MATERIAL DISCLOSURES

1) The SOCIETY has three locations within the one site located in the District of Saanich a) The Nature Centre, b) Swan Lake c) Christmas Hill

3) The SOCIETY Nature Centre exterior and main trail entrances must maintain signage.

Selection by Swan Lake Christmas Hill Nature Sanctuary Society to perform the work for which it responsible, does not ensure that the same Proponent will be retained by the Society to perform work as extended via other request for proposals nor does it ensure the same Proponent will be retained by the District of Saanich to perform the work for which it is financially responsible.

C. OTHER MANDATORY REQUIREMENTS

1) Terms of Engagement (Appendix A)

Proponents shall include a proposed terms of engagement document that the SOCIETY and the successful proponent will use as the basis of the negotiation phase of the contract development process.

D. RATED CRITERIA

Experience and Qualifications

Experience and Qualifications, including project team each proponent should provide the following in its proposal:

- i) a brief description of the proponent including details of experience in signage consultation, design, project management, manufacture and installation;
- ii) a description of the goods and services the proponent has previously and/or is currently delivering, with an emphasis on experience relevant to the Deliverables;
- iii) 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. Proponents shall include CV's related to the personnel that will be assigned to this project. Respondents shall outline the percentage contribution that is anticipated from each team member;
- iv) its knowledge, skills and expertise as it pertains to the Deliverables including knowledge of the signage at similar organizations:
- v) a Reference Form in accordance with the instructions set out in the Form attached as Appendix D to the RFP.

Methodology

The proponent shall outline the methodology that will be used to complete this work. How and from whom will the necessary information be gathered? Define the contribution anticipated from THE SOCIETY member representatives. Include a work plan and define the key milestones.

Scope of Work

The respondent shall clearly indicate what components are within the scope of the base project and clearly indicate any optional components of the project.

Timeline

The proponent shall define the proposed timeline and key milestones associated with the proposed work.

Pricing

The proponent shall clearly indicate the project costs and provide detailed costs for each section of appendices E and E(1).

If the respondent includes a provision for reimbursement of expenses, the proponent shall include a budget for anticipated expenses and a recommendation for cost management and approvals process. Proponents should review and complete the Rate Bid Form at Appendix C.

Pricing will be scored based on a relative pricing formula using the Rates set out in the Rate Bid Form.

Each proponent will receive a percentage of the total possible points allocated to price for the particular category it has bid on by dividing that proponent's price for that category into the lowest bid price in that category.

For example, if a proponent bids \$120.00 for a particular category and that is the lowest bid price in that category, that proponent receives 100% of the possible points for that category ($120/120 = 100\%$).

A proponent who bids \$150.00 receives 80% of the possible points for that category ($120/150 = 80\%$), and a proponent who bids \$240.00 receives 50% of the possible points for that category ($120/240 = 50\%$).

Lowest rate ----- x

Total available points = Score for proposal with second lowest rate Second-lowest rate Lowest rate

----- x

Total available points = Score for proposal with third-lowest rate Third-lowest rate And so on, for each proposal.

The following is an overview of the categories and weighting for the rated criteria of the RFP.

Proponents who do not meet a minimum threshold score for a category will not proceed to Stage III of the evaluation process. Rated Criteria Category Weighting (Points) Minimum Threshold Expertise and Qualifications, including:

Project team 40 - 30 points

Ability to Provide Full Scope of Signage Services 15 - 12 points

References and Related Project Experience 10 - 10 points

Timeline 10 - 10 points

Pricing 25 - N/A

Total Points 100 - N/A

Appendix E (1) -RFP Particulars Signage Services Outline of Key Deliverables

The purpose of this Request for Proposal (RFP) is to procure signage services for Swan Lake Christmas Hill Nature Sanctuary Society. The Society will require a range of services from signage firms, which hereafter may be referred to as “Consultants” and/or “Proponents”, including but not limited to: stakeholder consultations, general consulting, design, and preparing tendering specifications and documentation for sign fabrication and installation.

Both interior and exterior signage is required. Signage will include, but will not be limited to, that which assists in identifying the buildings, directing visitors to the buildings, promoting the SOCIETY brand and its mission, creation of and updating of Historic Properties signage as required and recognizing the new boardwalk and the associated donors.

There are 3 separate projects being sent to tender as part of the overall scope described in a Vision Document for the work required by the SOCIETY. Embedded within the overall scope of this RFP project is the Wayfinding and Interpretive Signage Project. The SOCIETY reserves the right to source separate proposals for the other projects in the Vision Document.

Project

Perform consultations, prepare drawings and renderings and manufacturing specifications and tendering documents for signage to enhance Swan Lake Christmas Hill Nature Sanctuary Society’s presence and brand at the Nature House, the wetlands Swan Lake site and Christmas Hill site; including new exterior wayfinding/interpretive signage.

The sign system consists of wayfinding, interpretation and regulatory categories. Adherence to our brand guidelines ensures a consistent “Sanctuary style” across different signage types. Interpretive signs should be interactive and engaging for different age groups.

Proponents must obtain all necessary permits for exterior signage additions, removals and updates, as necessary. Proponents should respect Swan Lake Christmas Hill Nature Sanctuary Society's official brand colors and, as necessary, match existing signage and building exterior colors. Proponents must also ensure any historical building preservation requirements are met. Specifically the scope should include the following steps:

1. Review existing signage at the Nature House, Swan Lake wetlands and Christmas Hill (for context)
2. Walk site properties (the trails surrounding the lake and Christmas Hill) to gain an appreciation for the use of signage in this urban protected area.
3. Review the SOCIETY's Vision Document for the project(s) as it outlines the signage needed over both the Swan Lake and Christmas Hill sites.
4. Review the SOCIETY's recognized official brand colors.
5. Provide designs and conceptual drawings to brand Swan Lake Christmas Hill Nature Sanctuary Society's occupancy in Saanich as the "Natural Heart of the City" and ensure that Swan Lake Christmas Hill Nature Sanctuary Society's presence and brand in the designs are evident and prevalent.
6. Provide designs and conceptual drawings for signs Swan Lake Christmas Hill Nature Sanctuary Society Nature House, Swan Lake and Christmas Hill sites trail entrances (currently, the Society has very little presence in the neighbourhoods of Swan Lake and Christmas Hill).
7. Meet with the SOCIETY and if required, the Society Board and or District of Saanich staff for a start-up meeting and to walk around the Sanctuary. During this tour, the SOCIETY will discuss the need to refresh existing signage that brands the two sites as part of the larger "Natural Heart of the City".
8. Discuss the implementation budget for the project with the SOCIETY, quoting separately on each so that any designs proposed are in alignment with the proposed organizational budgets.
9. Have a discussion with Society Staff to understand any concerns (if any) associated with preparation of preliminary concepts for all of the proposed signage and to ascertain any permit requirements, if any.
10. Meet with the SOCIETY and its staff and the Ecosystems and Facilities Committee to present the draft signage concepts and drawings. The consultant should also plan for a separate meeting with the full SOCIETY Board and possibly the Membership in order to obtain feedback on the proposed design concepts.
11. Make revisions as necessary and finalize concepts.
12. Prepare specifications for signage fabricators to bid on the fabrication and installation of signage. This would include shop drawings, colour palettes, etc.
13. Any contract administration during construction would be billed at regular hourly rates and is not part of this tender.

Other Requirements:

Proponents should be capable of providing complete onsite project management and oversight. Proponents must explain in detail their business capabilities to meet Swan Lake Christmas Hill Nature Sanctuary Society's signage requirements. Proponents will be responsible to provide and/or obtain all necessary equipment, labour, indemnities, liability insurance, and safety equipment to complete these signage services. Proponent's proposals should provide renderings/shop drawings and photographs of recently completed signage projects and details of the projects which demonstrate the Proponent's ability to provide all of the service requirements outlined above and how the Proponent organizes, executes and completes signage projects.

Proponents should also provide a project schedule that includes the tasks and the level of effort to ensure that the required time frame to complete the work is in accordance with the Society's scope. Proponents should detail the use of sub-contractors and their associated work scope, if any, that are proposed to provide some of the required services. If subcontractors are used, references and details of past projects with the Proponent should be included.

Swan Lake Christmas Hill Nature Sanctuary Society reserves the right to request a formal presentation from all or a "short list" of the proponents. Presentations shall include a brief overview of the proponent's written proposal, a more in depth discussion and demonstration of the solution being offered, and questions and answers.

Other Proposal Requirements:

Delivery

The Society is working to a target of site installation on/or before June of 2020. This is the 45th anniversary of the SOCIETY, this date may become critical and influence our selection; please consider this when calculating lead times.

The proponent must include a detailed schedule for implementation in order to meet the site installation requirement. Also include proposed dates of when the specification and tendering documents will be prepared for the fabrication and installation and other relevant requirements.

Fitness for Purpose

The Proponent shall be deemed to have reasonable knowledge of and satisfied itself as to the nature of the Society's requirement, and any conditions which may affect its proposal to supply, in order that the goods and related services offered shall be fit for its purpose.

Alternative Proposals

You may wish to submit an Alternative Proposals which include preferential costs based on closer association of partner organizations, an innovative approach to the supply or alternative means of delivering best value for money. Alternative Proposals must be clearly marked so, and be submitted as separate appendix to your main tender.

Change in Status of Proponent

In the event that after the date of this RFP and prior to the award of any Contract, the status or identity or circumstances of the Proponent is changed in any material way, including but not limited to merger, amalgamation, take-over or any other reorganization, change of name, or involvement in any action relating to receivership, liquidation, bankruptcy, or similar action, such change will be notified to the Society immediately. Failure to comply with this may result in Proponents being disqualified, or in the event of any award of Contract shall be deemed to be in breach of Contract.

Contact for Inquiries

All questions relating to the RFP must be addressed in writing to Kathleen Burton, Executive Director Swan Lake Christmas Hill Nature Sanctuary Society at www.swanlake.bc.ca

Answers to technical queries shall be circulated as necessary. The authorized contact for this RFP is Kathleen Burton and in no circumstances should the substance of these documents be discussed with any other member of the Society without the specific written agreement of the authorized contact.

* Please note:

- 1) Swan Lake Christmas Hill Nature Sanctuary Society reserves the right to refuse a proposal which has not been submitted in accordance with the instructions detailed here.
- 2) Selection by the SOCIETY to perform the work for which it is responsible, does not ensure that the same Proponent will be retained to perform the work for all four projects, for which the Society is financially responsible.