



REQUEST FOR PROPOSAL

NWRFP-22-11

Consulting Services for Climate Action Planning and Development

Closing Time:

Thursday, June 16, 2022
3:00 PM, Local Time, Vancouver BC

Closing Location:

upload to https://fileshare.newwestcity.ca/filedrop/purchasing_submissions

Further requests for information :

Purchasing: Patrick Shannon, SCMP
Purchasing Manager

Email: nwpurchasing@newwestcity.ca

PROPONENT NAME		
Street Address:		
City Province Postal Code		
Contact Name:		
Telephone number:		Fax:
Email		Date:
Signature: by authorized signatory		

By my signature above, it shall be understood that I have read, understood and accept the requirements outlined in the Request for Proposal; we hereby propose to supply the Services in accordance with the Request for Proposal and as outlined in this Form of Proposal.

CORPORATION OF THE CITY OF NEW WESTMINSTER**PART 1****RFP PROCESS & GENERAL REQUIREMENTS****1.0 GENERAL INFORMATION**

- 1.1** The City of New Westminster is seeking a firm to facilitate advancing our digital development approvals processes, from application intake through final approvals, including improving internal workflows, and enhancing use of existing related digital tools/platforms. The City reserves the right to use the lead proponent for a period of 5 years for the services as noted in this RFP or similar services. Refer to Part 2 – BUSINESS REQUIREMENTS AND SCOPE OF WORK for an in-depth scope of work.
- 1.2** The City of New Westminster is the first city in Western Canada and is located at the centre of Metro Vancouver. Just 20 km from downtown Vancouver, the City has both major transportation routes and railways running through its boundaries.
- 1.3** This is a request for proposals, and not a call for tenders or request for offers and no contractual obligations shall arise between the City and a Proponent upon the Proponent's submission of a Proposal to the City.
- 1.4** The city, at its discretion, reserves the right to;
- a) select a Proposal that deviates from the requirements of this RFP;
 - b) modify this RFP at any time.
- 1.5** Proponents will be solely responsible for their own expenses incurred in connection with this RFP, including in preparing and submitting a Proposal and in any subsequent negotiations with the City.
- 1.6** This RFP shall be governed by and construed in accordance with the laws of the Province of British Columbia.
- 1.7** The City reserves the right to negotiate with the lead Proponent deemed to provide the best overall value and such negotiations may include, but are not limited to:
- a) Changes to the requirements or Scope of Work proposed by the Proponent;
 - b) Price; and
 - c) Specific contract details as deemed reasonable for negotiations by the City.

2.0 COVID-19 GLOBAL PANDEMIC

- 2.1** Due to the COVID 19 global pandemic, the City may be required or decide not to proceed with the Work or to terminate any contract prior to the Work commencing. If this occurs, the City will only pay for actual costs incurred by the Proponent.

CORPORATION OF THE CITY OF NEW WESTMINSTER

2.2 In submitting a Proposal, the Proponent acknowledges the presence of the COVID-19 virus in Canada and other jurisdictions. The Proponent also acknowledges the consequences and impacts “Known Impacts” of the COVID-19 Pandemic existing as of the date of this Request for Proposal, and said “Known Impacts” have been accounted for by the Proponent within the schedule and pricing.

3.0 **PROPOSAL INSTRUCTIONS**

3.1 Proposals should be submitted electronically in one (1) Adobe (PDF) file with Subject “NWRFP-22-11 Submission” in the Subject to

https://fileshare.newwestcity.ca/filedrop/purchasing_submissions

3.2 The City will receive Proposals at the location and time indicated on the title page of this Request for Proposal.

3.3 It is the Proponent's responsibility to ensure that the City receives its Proposal prior to the closing time indicated on the title page of this Request for Proposal. The City does not accept facsimile or other unsealed Proposals.

3.4 Requests for clarification or further information must be made in writing only to the individual identified on the first page of this RFP. The City intends to respond to enquiries that it, in its sole discretion, considers relevant to this RFP. The City intends to respond only to those relevant written enquiries received at least ninety-six (96) hours prior to the closing time. The City will record enquiries and post written responses on its website at <https://www.newwestcity.ca/business-and-economy/doing-business-with-the-city/request-for-bids-and-proposals-open>

4.0 **CONTRACT REQUIREMENTS**

4.1 The City anticipates that any contract arising from this RFP will be based on the City's Consulting Services Agreement and Statement of Work provided by the consultant.

https://www.newwestcity.ca/business-and-economy/doing-business-with-the-city/procurement_policy.php

4.2 The City expects that any Agreement with the selected Proponent will be for an initial term of one (1) year with two (2) optional one (1) year renewal terms at the sole discretion of the City.

5.0 **OWNERSHIP OF PROPOSALS AND FREEDOM OF INFORMATION**

5.1 All documents submitted with your Proposal will become the property of the City, and as such shall be subject to the disclosure provisions of the *BC Freedom of Information and Protection of Privacy Act (FOIPPA)* and *Community Charter*. A Proponent may stipulate in their Proposal that a portion(s) of their Proposal that contains confidential information and is supplied to the City in confidence. However, under FOIPPA, the City may nevertheless be obligated to disclose all or part of a Proposal in response to a request made under the Act, even if the Proponent has stipulated that part of their Proposal is supplied in confidence. The Proponent should review

CORPORATION OF THE CITY OF NEW WESTMINSTER

Section 21 and other provisions of FOIPPA in order to gain a better understanding of the City's disclosure responsibilities under the Act.

6.0 INSURANCE, PERMITS AND LICENSES

- 6.1** The successful Proponent will, without limiting its obligations or liabilities and at its own expense, provide and maintain throughout the Contract term, the following insurance with insurers licensed in British Columbia in forms acceptable to the City:
- a) Commercial General Liability Insurance protecting the City, for an amount of five million dollars (\$5,000,000) naming the City as additional insured;

- 6.2** The successful Proponent may be required to obtain a City of New Westminster or MetroWest Inter-Municipal Business license prior to commencement of work.

7.0 LIVING WAGE EMPLOYER

- 7.1** Effective January 1, 2011, the City of New Westminster became a "Living Wage Employer". As such, the City has established a [Living Wage Policy](#) that requires all firms that are contracted by the City to provide services on City premises, to pay their employees, who perform said service on City property, a Living Wage as calculated by the Living Wage for Families Campaign. The current living wage rate for Metro Vancouver is \$20.52 per hour, assuming the employer provides no benefits.

- 7.2** In order to determine an employee's hourly rate with benefits the Living Wage for Families has created a Living Wage Calculator to assist with this determination. Please access the following website to determine your compatibility.

http://www.livingwageforfamilies.ca/living_wage_calculator

- 7.3** The City includes in all its competitive bid documents a Declaration referencing the City's expectations with regards to compliance of the Policy (attached as Appendix A). **Completion and submission of the Declaration is required prior to Contract award.**

- 7.4** In evaluating submissions, the City intends to rely on the Declaration provided by a Respondent and shall have no obligation or duty to investigate the truthfulness of the Declaration. Please review the City's [Living Wage Page](#) for further information.

8.0 EVALUATION AND SELECTION PROCESS

- 8.1** The City will evaluate all submitted valid Proposals. The City will not necessarily accept any or all Proposals. The object of the evaluation and selection process is to identify the Proposal that, in the City's opinion offers the best value for the services requested.
- 8.2** The City will evaluate the requirements and only those deemed by the City to have the right experience/capabilities/methodology etc. will be contacted

CORPORATION OF THE CITY OF NEW WESTMINSTER

8.3 Proposals will be evaluated based on the following criteria:

Evaluation Criteria	Weighting
Team Experience	15%
Project Experience	50%
Methodology	15%
Cost	10%
Social and Sustainability	5%
Value Add	5%
Total	100

8.4 The City, at its discretion, may request any or all of the Proponents to present their proposals and/or interview with the Selection Committee. Note that any information provided by Proponents in their proposals or discussed in presentations/interviews may be incorporated into any Contract with the Proponent.

8.5 The City advises all Proponents that the process for evaluation/interview and finalizing the lead/winning proponent may take 2 – 3 months.

9.0 NEGOTIATIONS

9.1 The award of a contract may be subject to negotiations with the lead Proponent that is deemed to provide the best value to the City. Such negotiations include, but not limited to, the following:

- a) Changes to the requirements or Scope of Work proposed by the Proponent;
- b) Price; and
- c) Specific contract details as deemed reasonable for negotiations by the City.

9.2 If a written contract cannot be negotiated within fourteen (14) days of notification with the lead Proponent, the City may, at its discretion at any time thereafter, terminate negotiations with the lead Proponent and either enter into negotiations with the next qualified Proponent or cancel the RFP or negotiate with another supplier.



Corporation of the City of
NEW WESTMINSTER

NWRFP-22-11

PART 2

**BUSINESS REQUIREMENTS, SCOPE OF WORK, AND
SUBMISSION REQUIREMENTS**

CORPORATION OF THE CITY OF NEW WESTMINSTER

1. **BACKGROUND**

- 1.1 The City of New Westminster's Climate Action Planning and Development (CAPD) department is seeking a multidisciplinary consulting team to facilitate advancing the planning and building permit digital development approvals processes, from application intake through final approvals, including improving internal workflows, and enhancing use of existing related digital tools/platforms.
- 1.2 See Appendix B that contains additional background.

2. **BUSINESS REQUIREMENTS & SCOPE OF WORK**

- 2.1 See Appendix B that contains an overview of the requirements and scope of work.

3. **SUBMISSION REQUIREMENTS**

- 3.1 Proposals should be concise and directed to the requirements of this RFP. Proposals should be provided double-sided on 8 ½" white paper, in a font colour of black and not less than 11 point. All proposals must include and clearly identify:
- a) **Cover Page:** Front page of this RFP shall include the required Proponent information filled out and signed.
 - b) **Executive Summary:** (1 page) including a brief history of the firm, overview of overall ability and expertise, and experience and competencies in providing deliverables similar in nature to those identified for this project
 - c) **Team Experience:** Provide a brief bio of the team member(s); ensure you indicate how their experience is relevant to this RFP.
 - d) **Project Experience:** (Max 3 pages per example) Provide 2 examples of where you provided similar systems as outlined in this RFP and ensure to include, but not limited to, the following points:
 - 1) Type of client (private or government)
 - 2) Nature of the project scope – outline software, processes, protocols involved.
 - 3) Identify the scale of the project (single or multi-departmental)
 - 4) Identify the project deliverables including as applicable, workflows, organizational charts, reporting metrics, training guides, etc.
 - 5) Identify the timeline for the project and what stage the project is in now.
 - 6) Knowledge of municipal development approvals process, including planning and building approvals
 - 7) Knowledge of Tempest, EDMS, Camino, Microsoft Dynamics 365 CRM software
 - 8) Knowledge of other municipal development approvals related software
 - 9) Experience working with organizations to evolve their digital permitting process and tools

CORPORATION OF THE CITY OF NEW WESTMINSTER

- e) **Methodology:** (3 pages max) – using all the information provided in this RFP, provide a review on how you would propose to work with the City. Ensure you outline your proposal to:
- 1) Engage with the City to identify a project work plan
 - 2) To secure the information you need from the City
 - 3) Create comparative evaluations of software platforms/vendors
 - 4) Identify new opportunities for consideration
 - 5) Create new protocols, procedures and reporting metrics.
 - 6) Provide a framework for engaging with other departments and sustaining the project
- f) **Cost/Schedule:** Using the summary provided in question e) Methodology provide a summary of the costs, include a high-level schedule and expected level of effort in hours for each task.
- g) **Value Add:** Provide a description of your organization’s unique expertise and successes; what sets your firm and proposed team apart from other organizations with respect to this project
- h) **Social and Sustainability:** Explain your social and sustainability policy and process. Explain how your company addresses anti-racism, diversity, inclusion, and equity. Explain how your company promotes sustainability (locally and in your operations), i.e. do you have a carbon footprint reduction plan? How do you manage waste in your facility or on a job-site?
- i) **Living Wage Declaration:** As per Part 1, section 7.
- j) **References:** Complete the attached table of references below

CORPORATION OF THE CITY OF NEW WESTMINSTER

REFERENCES

Please provide three (3) references for companies whom your organization has completed work of a similar magnitude and nature in the past five (5) years. The City of New Westminster may be used as a reference, if work of a similar nature has been provided to the City.

Reference 1	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

Reference 2	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

Reference 3	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

- 1.1** The City reserves the right to contact the references to confirm the nature and performance of the work provided by the Proponent. The City reserves the right to seek a reference from sources other than those provided by the Proponent.



Corporation of the City of
NEW WESTMINSTER

NWRFP-22-11

APPENDIX A

DECLARATION – LIVING WAGE EMPLOYER

CORPORATION OF THE CITY OF NEW WESTMINSTER



DECLARATION – LIVING WAGE EMPLOYER

I, _____ as a duly authorized signing officer of

Company: _____

Address: _____

_____, confirm that all employees and sub-contractors under our contract with the City as outlined below, are paid not less than the “Living Wage” as calculated by the Living Wage for Families Campaign.

I understand that this requirement extends only to those employees and sub-contractors’ employees that perform work while on City premises and property for durations in excess of one continuous hour per occasion.

I understand that the City will conduct audits if and when notification of breach of this compliance is received by the City. I understand that in the event any breach of this declaration is found to be true, the City reserves the right to cancel its contract without penalty at any time once said authentication of the breach is made.

Contract Name: _____

Authorized Signatory:

Dated:



Corporation of the City of
NEW WESTMINSTER

NWRFP-22-11

APPENDIX B

BUSINESS REQUIREMENTS & SCOPE OF WORK

CORPORATION OF THE CITY OF NEW WESTMINSTER

1. INTRODUCTION

- 1.1 The City of New Westminster's Climate Action Planning and Development (CAPD) department is seeking a multidisciplinary consulting team to facilitate advancing the planning and building permit digital development approvals processes, from application intake through final approvals, including improving internal workflows, and enhancing use of existing related digital tools/platforms.
- 1.2 The overall project is expected to be carried out in two parts: (1) review of current processes/platforms, and development of an implementation plan and business case for moving 100% to efficient digital permitting and data management; and (2) implementation of the plan. This Request for Proposals entails part 1. The City reserves the right not to proceed with scope in part 2, and to select a different consultant(s) for part 2.

2. BACKGROUND

- 2.1 CAPD currently uses a combination of digital and manual methods to intake, manage workflow for, and issue planning and building permit applications. The Department's goal is to move 100% to an efficient digital permitting and data management process, and to integrate this with the City's broader E-government platform, which is currently under development.
- 2.2 CAPD currently uses a range of software programs and platforms to manage intake, interdepartmental workflow, and filing, including EDMS (under review and may be replaced in the future), Tempest (primarily Prospero, Land, Calls-for-Service modules), Adobe/BlueBeam, MS suite, Camino.
- 2.3 The subject applications require review from staff in multiple divisions and departments, who are responsible for applying a wide range of policies, regulations and practices as part of their review. This often requires interdepartmental consultation and collaboration to negotiate solutions where different mandates overlap. This includes Engineering, Electrical, Fire, Planning and Development (current planning, long range planning, social planning, tree permits, heritage), Building, Plumbing, Parks and Recreation, Climate Action, and Licensing. In particular, many of the applications flow directly between Planning and Development, and Building. The process resulting from the project must be accessible and easily useable by all related staff, but must particularly address workflow between Planning and Development, and Building.
- 2.4 CAPD requires a fulsome review of our current processes and use of software/platforms and, based on that review, development of a plan and business case for moving 100% to efficient digital permitting and data management. As part of this review, we will need to determine whether to change software/platforms or restructure our current tools to create more effective interdepartmental digital permitting and data management. For example, currently our teams use Tempest inconsistently and ineffectively leverage the power of that tool; with restructuring and additional staff training, could Tempest be the best tool for our needs?

CORPORATION OF THE CITY OF NEW WESTMINSTER

- 2.5** The project will be overseen by a Steering Committee of key staff from CAPD and a representative from the Information Technology department.
- 2.6** To realize an integrated, holistic digital permitting and data management process/platform, at appropriate points in the project, coordination will be required with representatives from all divisions of CAPD (Planning and Development, Building, Climate Action, and Integrated Services), and/or with other City departments (e.g. Parks and Recreation, Fire, Engineering), and/or other City stakeholders.
- 2.7** Given current limits to City staff capacity, the review and plan/business case development are anticipated to take one year from start-up meeting through delivery of final documents.
- 2.8** CAPD is able to provide the following background materials to the selected consulting team:
- a) Public process guides
 - b) Process Documents (not all current)
 - c) Emails and similar outlining components of processes.
 - d) Internal Draft Process Overview Documents
 - e) Internal Planning Workflow diagrams
 - f) Current application guides for Building and Tree Permits
 - g) Digital Building Permit Application workflow chart for Camino
 - h) Prospero Business Process Review provided by Central Square (note: this review did not adequately address the needs of all staff users.)
 - i) Demonstration of how each division within CAPD is using Tempest

3. PROJECT PROCESS & PHASES

- 3.1** The project will be carried out through a combination of research and analysis, interviews, and implementation plan/business case preparation.
- 3.2** **Phase 1 – Research and Review:** review existing City materials; survey practices at other similar municipalities; work with the Steering Committee to develop a matrix of key points for comparison between at least 12 different types of applications.
- 3.3** **Phase 2 – Interviews:** individual and/or small group research sessions with key staff to “flesh out” understanding of our current processes; and with the Steering Committee to establish vision and goals for future process and software/platform.
- 3.4** **Phase 3 – Development of an Implementation Plan:** based on outcomes of Phases 1 and 2, including vision and goals, develop a plan for moving CAPD 100% to efficient digital permitting and data management, including detailed refined workflow diagrams for at least 12 application types, and recommended improvements/changes to software/platforms being used.
- 3.5** **Phase 4 – Business Case Development:** Once the Implementation Plan is approved in principle by CAPD, develop a minimum of a class C cost estimate and supporting business case.

CORPORATION OF THE CITY OF NEW WESTMINSTER

4. PROJECT REQUIREMENTS, SCOPE & DELIVERABLES

4.1 The following sections outline consultant responsibilities and deliverable expectations for the six phases listed in Appendix B - Sections 3.1 - 3.5. You may wish to make a strong case for different phases or a shift in approach; we are open to that as we are looking for the best way to reach the project objective outlined in Appendix B - Section 1.1.

4.2 As Part of Phase 1, Research and Review, we anticipate the consulting team will undertake/provide the following:

- a) Attend a project initiation meeting with City staff, for introductions, refinement of the project strategy, scope and timeline, and list of municipalities for review. An initial list of municipalities is North Vancouver, Richmond, Burnaby, Surrey, Coquitlam, and Victoria.
- b) Review City materials provided.
- c) Develop a matrix of key points for comparison between at least 12 different types of applications, with input from the Steering Committee, including considerations such as manual vs. digital processing, which software/platforms are used, common submittal requirements, how data is managed, review process steps, how the platforms are managed (i.e. change protocols), and how permits are issued, etc.
- d) Survey related practices at selected municipalities, with particular attention to the comparison matrix.
- e) Meet with the Steering Committee to review and discuss findings.
- f) Key deliverable: completed municipal comparison matrix document, in both pdf and “live” document.

4.3 As Part of Phase 2, Interviews: we anticipate the consulting team will undertake/provide the following:

- a) Undertake approx. eight interviews with individuals/groups of staff from all development-related departments to “flesh out” an understanding of our current processes, including clarifying steps, and identifying gaps and issues.
- b) Facilitate a workshop with the Steering Committee to establish vision and goals for future development review process and software/platform.
- c) Prepare “What we heard” summary document and draft vision and goals document for review with Steering Committee; meet with the Steering Committee to review and discuss findings.
- d) Present to interdepartmental staff; working with Steering Committee, finalize documents based on feedback.
- e) Key deliverable: final “what we heard” summary, and vision and goals document, including what feedback was/was not incorporated and why, and related PowerPoint presentation, in both pdf and “live” document.

CORPORATION OF THE CITY OF NEW WESTMINSTER

- 4.4** As Part of Phase 3, Implementation Plan, we anticipate the consulting team will undertake/provide the following:
- a) Initiate analysis based on Phase 1 and 2 findings, including but not limited to: what we are doing well and what needs improvement, where there are opportunities to improve, and/or replace software/platforms.
 - b) Create updated detailed process workflows for at least 12 application types, including detailed annotations of tools, staff involved at each step, etc., and using flowcharts, diagrams and text; workshop draft workflows with Steering Committee.
 - c) Detailed analysis of software/platform changes and/or improvements needed to achieve 100% transition to digital permitting, including a comparison of alternative tools. This will include analysis of all software/platforms currently under use by CAPD (e.g. Tempest [including Prospero, Land and Calls for Service modules], Camino, other tools required to facilitate process), and consider the best approaches/tools for sharing information with internal and external stakeholders (e.g. web apps).
 - d) Prepare Implementation Plan, including but not limited to workflows, software/platform recommendations, management recommendations, identifying how each gap/issue identified in Phase 2 is addressed; meet with Steering Committee to review and discuss Plan.
 - e) Present to interdepartmental staff; working with Steering Committee, finalize Plan based on feedback.
 - f) Key deliverable: final Implementation Plan with key deliverables of Phases 1 and 2 appended, and related PowerPoint presentation, in both pdf and “live” document.
- 4.5** As Part of Phase 4, Business Case Development, we anticipate the consulting team will undertake/provide the following:
- a) Develop a draft of at a minimum class C cost estimate and supporting business case, including, case for change, cost/benefit analysis, sourcing/procurement recommendations, and management recommendations;
 - b) Meeting with Steering Committee and select interdepartmental staff to review Business Case.
 - c) Working with Steering Committee, finalize documents based on feedback.
 - d) Key deliverable: final Business Case and related PowerPoint presentation, in both pdf and “live” document.

5. TEAM QUALIFICATIONS

- 5.1** The City is seeking a consulting team with:
- a) Demonstrated ability in the diverse areas of knowledge required for the project, including but not limited to: current and innovative municipal software/platforms, workflow development, implementation planning, business case preparation including costing, facilitating group discussions with people of diverse mandates;
 - b) Experience in the municipal development review process, including the full range of planning permits, building permits, from initial inquiry through planning approvals, building permit review, inspections, and occupancy;

CORPORATION OF THE CITY OF NEW WESTMINSTER

- c) Both an understanding of the municipal framework that regulates application review, and an ability to think outside the box on how standard tools and processes might be used differently to achieve the objectives of the project;
- d) Proficiency regarding integrating equity and inclusion, and relatedly a team that embodies diversity.

6. BUDGET

The City's current project budget is \$100,000.00. All other incidental expenses require the written approval of the City representative.