



**REQUEST FOR PROPOSAL
ECONOMIC DEVELOPMENT STRATEGY
(RFP No.: ED-2023-001)
INFRASTRUCTURE AND PLANNING**

Issued: April 12, 2023

Proposal Submission Deadline: May 9, 2023, at 2:00:59 P.M. (Alberta Time)

NOTE: RESPONSES WILL NOT BE OPENED PUBLICLY

Posted to: Alberta Purchasing Connection at www.purchasingconnection.ca
Town of Edson website at www.edson.ca/town/tenders-rfps

Key Dates

RFP posted on APC (Alberta Purchasing Connection)	April 12, 2023
Deadline for Proponent's questions	April 21, 2023, at 2:00:59 p.m. (Alberta Time)
If Required, Final Addendum posting	May 3, 2023, at 2:00:59 p.m. (Alberta Time)
Submission Closing Date & Time	May 12, 2023, 2:00:59 p.m. (Alberta Time)
If Required, Proponent's proposal clarifications	May 15, 2023, to May 19, 2023
Successful Proponent(s) notification	May 22, 2023

***All dates and times are subject to change.**

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1. INSTRUCTIONS TO PROPONENTS

1.1 Introduction

This Request for Proposal (RFP) is an invitation by the Town of Edson to qualified, professional consultants to submit Proposals for Consulting Services to create a strategic plan that will guide the Town of Edson's economic development prospects within a local and regional scope.

This Request for Proposals sets out important dates related to the project, the details of the services required, submission particulars, evaluation criteria, and award process.

Project Name: RFP ED-2023-001 - Economic Development Strategy

Request for Proposals Issue Date: April 12, 2023

Request for Proposals Closing Date: May 12, 2023, at 14:00:59 MDT (local time)

It is anticipated that this project will include working with municipal staff, industry partners, community organizations and extensive consultation with residents, local businesses, and elected officials.

All relevant information related to this Request for Proposals can be found on the Alberta Purchasing Connection online platform. Request for Proposals documents will not be provided in any other manner.

The competition is also posted on the Town's Website: <https://www.edson.ca/town/tenders-rfps>

1.2 Preparation of Proposals

All Proposals received will be subject to all terms and conditions contained in this RFP competition. Proponents are responsible for familiarizing themselves with all terms and conditions of this document and for carefully examining the samples, specifications and other documents enclosed herewith (herein collectively referred to as the "RFP"). The Proponent shall make all inquiries and investigations necessary for the preparation and submission of proposals and shall be deemed to have made same prior to submitting the proposal response.

The Town will not be responsible for any costs incurred by a proponent in preparing and submitting a proposal.

1.3 No Guarantee of Volume of Work or Exclusivity of Contract

The Town 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 Town 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 Offer and Acceptance Period

A response to the RFP shall be deemed to be an offer to contract with the Town based upon the terms, conditions and specifications contained in this RFP. Proposals shall constitute offers which are irrevocable for a period of sixty (60) days after the RFP's Closing Date and Time. If in the

Town's sole opinion, a Proponent's Proposal does not meet these requirements, the Town may reject the Proposal.

1.5 Definitions

Terms used in this RFP have the meaning set out below unless otherwise indicated.

"Agreement" means a written document between the Town and the Proponent to perform the tasks, duties and responsibilities, as described in this RFP.

"Alberta Time" means Mountain Standard Time or Mountain Daylight Saving Time as provided for in the Daylight Saving Time Act of Alberta.

"APC" means Alberta Purchasing Connection and is the Government of Alberta's official web site where this competitive process is posted. Please see the following website for additional information: <http://www.purchasingconnection.ca>.

"Contract Administrator" means the Town's representative responsible for the day-to-day administration of the Agreement. The Contract Administrator is the Proponent's primary Town contact for all matters relating to the contract and service delivery.

"Must" means a requirement that is to be met in a substantially unaltered form for a Proponent's Proposal to be considered.

"Primary Contact" means the individual a Proponent (that has submitted a Proposal), designates to represent the Proponent during the competitive process associated with this RFPQ. There can be only one (1) Primary Contact.

"Proponent" means the firm or individual who has obtained a copy of this RFP or has registered as an Interested Proponent on APC for this competitive process.

"Proposal" means the Proponent's response to this RFP.

"Services" means everything done or performed by or through the Proponent that is within the scope of the RFP, including preparation and submission of any deliverables required by the Agreement.

"Town Contact" means the individual who will receive and accept the inquiries and Proposals for this competitive process.

1.6 Pre-Proposal Meeting

There will be no Pre-Proposal meeting scheduled for this competition.

1.7 Inquiries

Email inquiries will be accepted up to and including **2:00:59 p.m. Alberta Time, April 21, 2023**. No telephone inquiries will be accepted.

At the Town's sole discretion, information or clarifications regarding competitive process procedural issues may be provided to Proponent(s) after this date and time.

All inquiries shall be sent to the Town personnel listed below. Do not contact any other Town employees or Proponents regarding any aspect of this RFP process, procedural or technical.

For the purposes of this procurement process, the “Town Contact” is:

Emily Jensen, Infrastructure and Planning Administrative Assistant

Email: engineeringandplanning@edson.ca

When submitting an inquiry, identify your organization name, address, telephone, as well as “**RFP ED-2023-001 – Economic Development Strategy**” in the subject line of the email.

All inquiries received will be reviewed by the Town. Inquiries that may contain proprietary or confidential information, in the Town’s sole opinion, may be answered exclusively to the submitting Proponent directly via e-mail (not posted on APC) provided the response does not 1) require a modification to this RFP document, or 2) potentially provide the Proponent with an undue advantage in the competitive process. If the Town believes that either of these situations may reasonably arise, it reserves the right to request the Proponent to reword and resubmit the inquiry or not provide a response.

All other inquiries will be compiled and answered in the form of written Addenda issued by the Town and posted on APC. Proponents are strongly encouraged to submit inquiries as early as possible. Proponents are advised that all other inquiries received and answered by the Town will be provided verbatim to Proponents.

Prior to the Closing Date and Time, if the Town requires clarification pertaining to an inquiry submitted by a Proponent, the Town will direct the request for clarification to the Proponent’s representative that submitted the inquiry.

After the Closing Date and Time, the Town will direct all correspondence regarding this competitive process to the Proponent’s Primary Contact as identified in its Proposal. It is the Proponent’s responsibility to notify the Town personnel listed above—in writing and in advance—of any change in the Proponent’s Primary Contact information; this is especially critical for an e-mail address change.

The Town assumes no responsibility or liability arising from information obtained in a manner other than as described by this RFP.

1.8 Addenda

Any changes to this RFP as well as the response(s) to all inquiries received (subject to section 1.7) will be issued in the form of written Addenda. The final written Addenda will be issued no later than **14:00:59 Alberta Time, May 3, 2023.**

The final written Addendum to non-proprietary or non-confidential inquiries will be posted on APC no later than the above noted date and time. The final written Addenda to proprietary or confidential inquiries will be e-mailed directly to the Proponent’s representative that submitted the inquiry no later than the above noted date and time.

The date and time for issuing the final written Addendum may be amended at the sole discretion of the Town.

Verbal instructions shall not be binding.

It is the Proponent's sole responsibility to regularly check APC for any updates or Addenda pertaining to this competitive process, and to maintain current and accurate user profile information on APC. The Town will not be liable to any Proponent for any damages, direct or indirect, or lost profits arising out of the Proponent's use of the APC. By registering as an Interested Proponent on APC for this competitive process, the Proponent agrees to be bound by the terms and conditions set out on the APC website.

The Town requests the Proponent acknowledge receipt of all Addenda by completing and returning Appendix A with the Proposal. The Town shall have the sole authority to resolve any discrepancies, omissions, or conflicts in this RFP.

1.9 Closing Date and Time

The Closing Date and Time for this RFP is **May 12, 2023, at 14:00:59 Alberta Time**. The Closing Date and Time may be amended at the sole discretion of the Town.

For RFP closing purposes, the official time of receipt of Proposals shall be as determined by the time recorder clock located at the Civic Centre.

Failure to clearly identify Proposals as outlined in Section XXX being emailed to the Town's Contact just prior to the Closing Time, may result in delays in date and time stamping of Proposals. Proposals that are date and time stamped after the Closing Date and Time will not be evaluated.

1.10 Submission of Proposals

Proponents are to ensure the following below standards are followed for the electronic submission:

Email Structure:

- Email Address for proposal submission: engineeringandplanning@edson.ca
- Subject Line: **RFP ED-2023-001 – Economic Development Strategy (1 of 1)**
- Should the max file size of the proposal submission be exceeded, Proponents will need identify in the subject line 1 of 2, and divide their proposal into two or more smaller files which do not exceed the maximum file size, and submit these in multiple emails, with subject headings to follow the convention above.
- File(s) must be in .PDF format
- Maximum file size per email exchange shall not exceed 35MB
- Must include a "Read Receipt" at the time of an electronic submission

The Town accepts no responsibility for "undelivered" electronic proposal submissions.

1.10.1 Faxed or Paper submitted Proposals will not be accepted;

1.10.2 Proposals submitted in the name of an incorporated company shall be signed in the name of the company by a duly authorized representative of the company;

- 1.10.3 Proposals received after the Closing Date and Time will not be evaluated;
- 1.10.4 Delivery service disruptions will not be acceptable conditions for late Proposal submissions;
- 1.10.5 At any time prior to the RFP Closing Date and Time, a Proponent may withdraw its Proposal. No Proposal shall be altered, amended or withdrawn after the Closing Date and Time unless the Proponent is requested to do so by the Town;
- 1.10.6 There will be no public opening of Proposals;
- 1.10.7 Persons or firms submitting Proposals shall be actively engaged in the line of work required by the RFP and shall be able to refer to work of a similar character performed by them; and,
- 1.10.8 The Town will retain for its records all copies of Proponents' Proposals and related documents.

1.11 Exceptions

For the Proponent to be considered for possible exemption from the application of any of the terms and conditions or specifications contained in the RFP, the Town requests the Proponent's Proposal specifically address the term, condition, or specification in question by referring to the corresponding RFP page number and paragraph containing the term, condition, or specification and, if applicable, providing proposed revised wording.

The acceptability of any proposed exemption will be determined by the evaluation team. The extent of any proposed exemption(s) may be a factor in whether the Town will accept or reject a Proponent's Proposal.

1.12 Reservation

Notwithstanding anything to the contrary herein, the Town reserves the right in its sole discretion to:

- 1.12.1 Accept or reject any or all Proposals.
- 1.12.2 Add, delete and/or negotiate with a Proponent an Agreement containing different and/or additional items or terms without reference to other Proponents or Proposals.
- 1.12.3 Disqualify a Proponent in the event that, in the sole discretion of the Town, its Proposal does not contain sufficient information to permit a thorough analysis.
- 1.12.4 Verify the validity of the information supplied and reject any Proposal where the contents appear to be incorrect or inaccurate in the Town's estimation.
- 1.12.5 Award the contract to more than one Proponent without invalidating the Proposals.
- 1.12.6 Accept Proposals in whole or in part.
- 1.12.7 Accept a non-compliant Proposal.
- 1.12.8 Waive compliance with any requirement of this RFP for any one or more Proponents at any time without notice.
- 1.12.9 Accept or reject any Proposal where the Town believes the Town staffing levels required to implement and maintain a Proponent's proposed solution are unacceptable.

1.12.10 In the event that:

- Financial circumstances of the Town change;
- Political, economic or technical conditions change;
- Any other unforeseen event or circumstance occurs which is beyond the control of the Town; or,

The Town reserves the right, in its sole discretion, to cancel this RFP without award or compensation to Proponents, their officers, directors, employees or agents.

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

1.13 Freedom of Information and Protection of Privacy Act

While the *Freedom of Information and Protection of Privacy Act* allows persons a right of access to records in the Town's custody or control, it also prohibits the Town from disclosing personal information about an individual in certain circumstances, or business information, if disclosure could reasonably be expected to cause harm as outlined in the *Act*. Because of the complexity of this *Act*, Proponents must consider the potential that any information that is provided to the Town may be disclosed to a third party.

All information in the possession or control of the Town, including any information provided, obtained or under the custody or control of the Town as a result of this competitive process, is subject to the *Freedom of Information and Protection of Privacy Act*. Should the Town receive a request for any records that are under the control of the Town and in the Proponent's custody, the Proponent must provide the records, at the Proponent's expense, to the Town.

Assessment criteria and allocation formulas for this competitive process are public information. Information regarding individual assessments is considered confidential and may be provided, upon request, to the party to whom it relates. Third parties will only be provided information in accordance with the *Freedom of Information and Protection of Privacy Act*.

1.14 Conflict of Interest

Proponents must fully disclose, in writing to the Town on or before the Closing Date and Time of this RFP, the circumstances of any potential conflict of interest or what could be perceived as a possible conflict of interest if the Proponent were to become a contracting party pursuant to this RFP. The Town shall review any submissions by Proponents under this provision and may reject any Proposals where, in the sole opinion of Town, the Proponent could be in a conflict of interest or could be perceived to be in a possible conflict of interest position if the Proponent were to become a contracting party pursuant to this RFP.

1.15 Governing Law

This RFP shall be governed by the laws of the Province of Alberta, and the forum for all disputes shall be the Courts of the Province of Alberta.

2 BACKGROUND INFORMATION

2.1 Town Background Information

A community of 8374 residents, Edson is located halfway between Jasper and Edmonton along Highway 16 (the Trans Canada Yellowhead Route). The Town benefits from a mixed, resource-based economy. Residents and visitors come to Edson to work, live, and play, capitalizing on the Town's strategic location, economic strengths, and natural beauty. Recreation and the outdoors feature prominently in the local culture and lifestyle, as exemplified by the Town's extensive parks and trails network and a forthcoming regional multiplex.

Economy

The Town's growth is based on the rich natural resources in the region. Initially, the railroad provided access to the rich Alberta Coal Branch, and in the 1930s coal from the Branch was being distributed to Canadian and world markets. In the 1960s, petroleum and related industries added to the prosperity of the Edson district. In addition, the coal industry was revitalized in the 1970s with the launching of two mines in the area. The forestry industry has been a major employer in the Edson area since the Town's inception. In the future, the area's natural resources are expected to remain major contributors to the Edson economy. Resources available include coal, clay, sand/gravel, oil and natural gas, and timber. Products available locally include forest products, straw, hay, cereal grains, dairy products, cattle, poultry, horses, sheep, hogs, honey, seed potatoes and vegetables.

Major Projects

Edson, Alta., 200 kilometers west of Edmonton, sits along the Yellowhead Highway and has long been a resource-driven town. Currently under construction nearby are part of the Trans Mountain pipeline expansion, another pipeline project from TC Energy and the \$1.5-billion Cascade Energy Project power plant. This flurry of economic activity comes after several slow years following the oil market crash of 2015; recent projects have brought 2,000 additional workers into the area.

Major Industries

- Oil & Gas Production
- Oilfield Construction
- Coal Mining
- Forestry
- Hospitality Services
- Retail Services

Key Identifiers

- Strategically located midway between Jasper and Edmonton on the very busy TransCanada Yellowhead Highway;
- High quality of life that provides opportunities for community involvement and a sense of belonging and understanding;
- Quiet, friendly, safe community with a customer oriented civic government;

- Outdoor and indoor recreation activities; such as an 18 hole golf course, curling, slo-pitch, spray park, hockey, swimming, tennis, soccer, skiing, hiking, fishing and boating. Close proximity to numerous campgrounds;
- Growing retail and commercial sector that offers a variety of professional and customer oriented services;
- Top-rated schools;
- First class protective and emergency services, hospital and wide range of professional medical services;
- Reasonable tax and utility rates;
- Close to several tourism, arts and cultural attractions such as the Red Brick Arts Centre and Museum, the Galloway Station Museum, the Cardinal Divide, Cadomin Caves, Emerson Lake and the Hoodoos, Silver Summit Ski Hill, and Hornbeck Cross Country Ski Trails; and
- Our proximity to the beautiful McLeod River provides excellent opportunities for outdoor recreation.

Council's Strategic Plan commits the Town to fostering a robust and adaptable economy by promoting the Town as a place to do business. This Plan will be accomplished through creating and implementing an Economic Development Plan and by creating and leveraging a value proposition that highlights Edson's strengths.

The Town of Edson, Infrastructure & Planning Division invites the submission of Proposals from interested consultants for the provision of an Economic Development Strategy that will be required by the Town.

2.2 Project Description and Deliverables

The Town of Edson has recently put a focus on economic development and is seeking to widen the portfolio through an Economic Development Strategy. This project will guide the Town and provide direction on opportunities to support the community, business owners and prospective business owners. This project will also determine the type and quantity of tourism that suits the Town and the mechanisms to achieve the goal of Council's Strategic Plan. Please find below the following deliverables:

2.2.1 Current State Analysis

The successful Proponent will conduct a local and regional analysis to assess Edson's current economic landscape and trends. This deliverable will include but not be limited to the following:

- a) Environmental scan;
- b) Data collection and research;
- c) Review of relevant historic studies and reports;
- d) Market analysis and trends;
- e) Situational analysis;
- f) Industry analysis;
- g) Labour market analysis; and

h) Strengths, weaknesses, opportunities and threats (SWOT) analysis.

The successful Proponent will provide a work plan that includes the identification of all key components in fulfilling a comprehensive current state analysis.

2.2.2 Community and Stakeholder Engagement

Preparation of the Economic Development Strategy will require a robust engagement process that facilitates real and equitable discussions. To ensure that we gather meaningful perspectives, the Proponent will design and implement community and stakeholder outreach for engaging with the Edson community. The process of engagement should be based on the current state analysis and be foundational towards the construction of the Economic Development Strategy.

Apart from residents and businesses, the other list of stakeholders impactful to the strategic vision of the Town are the following:

- Industry partners;
- Community organisations;
- Elected officials; and
- Economic Development Partners:
 - Community Futures West Yellowhead.
 - Edson and District Chamber of Commerce.

Proponents should also include a communication plan that explains the communication process between the Proponent, the Town of Edson, industry partners, community organizations, elected officials, and economic development partners.

2.2.3 Economic Development Strategy

Intent

The Town of Edson serves its residents, businesses, and visitors by promoting a vibrant and prosperous community. To that end, the Town of Edson prioritizes committing the resources necessary to create a responsive economy that nurtures a competitive workforce and generates a thriving economic market that is prosperous and resilient. The successful bidder will articulate a successful strategy and proposal to accomplish this mission and will provide the tools and actions necessary for the Town to measure success and deliver on the strategic plan goals that are set.

Key Objective

To identify strategic opportunities and propose actions to seize, retain and attract new investment, job creation and wealth generation in the Town of Edson over a 10-year horizon.

All prospective Proponents are required to articulate and address their approach to developing an Economic Development Strategy that is clear, succinct, visually attractive, and includes the following:

- Values, vision, mission;
- Strengths, opportunities and value proposition;
- Strategic framework;

- Strategic focus areas/goals;
- Key industry focus; and
- Implementation, resources, and timelines.

2.2.4 Action Plan

The Proponent will draft an easy-to-understand visual and branded final Action Plan, highlighting near, medium and long-term action items set to be completed in fulfilling the Economic Development Strategy. It will identify the action that must take place and the metrics that determine its level of success. This document will also include general economic metrics, benchmarks, and indicators for the Town that were assessed in the initial evaluations and must continue to be tracked to assess success and progress on goals, objectives, policies, and the selected programs and projects. The Town is also looking for implementation measurements that would assess the level of success for each action plan item and the ones that remain on the list submitted to the Town.

Proponents should include their approach and steps involved in providing the Deliverables.

2.3 Relevant Documents

Please find below supporting documentation that proponents may want to review or reference in preparation for this RFP:

- [Land Inventory Report](#)
- [Town of Edson: Economic Base Analysis](#)
- [Town of Edson Triage BR&E](#)
- [Community Futures West Yellowhead Triage BR&E](#)
- [Town of Edson Community Profile](#)
- [Catalis GIS](#), maps, imagery, and database information (available upon entering into a Data Agreement)

3 PROPOSAL EVALUATION PROCESS

3.1 Screening

Upon receipt of the Proposals, an evaluation team will screen each Proposal to ensure the Proponent's compliance with the requirements of this RFP. After the Proposal has passed the initial screening, the evaluation team will then undertake a detailed analysis of the Proponent's Proposal.

3.2 Evaluation Process

The main areas of consideration and the weighting in the evaluation process are:

Rated Criteria Category	Points
RFP Deliverables Comprehension & Completion <ul style="list-style-type: none"> • Statement of understanding of deliverables • Formatting (including table of contents) adheres to RFP requirements • All necessary forms and information included 	0 to 15
Proposed Work Plan, Methodology and Approach <ul style="list-style-type: none"> • Detailed work plan provided with proper identification of all key components in fulfilling a current state analysis. • Communication plan that explains the communication process between the Proponent and key stakeholders; • Details provided of the project management approach and methodology that will be followed for each phase of deliverables; and • Detailed project schedule provided in GANTT chart which demonstrated a critical path for each deliverables. 	0 to 30
Experience and Qualifications <ul style="list-style-type: none"> • Description of the company, resources & details provided of same or similar projects; • Demonstrated ability (Facilitation/Collaboration/Analysis/Formulation); and • Provided examples of at least three (3) Economic Development Strategy projects completed in other Canadian Municipalities. 	0 to 30
References <ul style="list-style-type: none"> • Relevant references provided; and • Reference feedback. 	0 to 10
Proposal Price / Financial Model	0 to 15

***Non-Compliant Proposals will be eliminated without further evaluation**

At any time during the evaluation process, the Town may request written clarification concerning any aspect of a Proponent’s Proposal. If the Town is not satisfied as to the reliability of any proposed solution, the Proposal may be rejected, at the sole discretion of the Town.

3.3 Other Mandatory Requirements

3.3.1 Safety Prequalification

Respondents shall possess a valid Certificate of Recognition (“COR”) which is relevant to their industry, and which is recognized by Alberta Human Resources and Employment, Workplace Health and Safety at the Submission Deadline.

Prospective respondents who do not possess a COR and wish to obtain information about obtaining a COR, are advised to contact:

Government of Alberta
www.alberta.ca/get-certificate-recognition.aspx

Respondents shall submit a copy of their valid COR. (To be placed within Appendix H)

3.4 Award Strategy

The successful Proponent will be notified as soon as possible after acceptance of its Proposal. Selection of a successful Proponent does not obligate the Town to negotiate or execute an Agreement.

3.5 Proponent Debriefing

Respondents may request a debriefing after receipt of a notification of the outcome of the RFP process. All requests must be via email to the Town Contact and must be made within thirty (30) days of notification of the outcome of the selection process.

3.6 The Workers’ Compensation Act

As a part of the screening and evaluation process, the Town will perform account reviews and obtain employer clearance certificates for Proponents to ensure compliance with the requirements of the Workers’ Compensation Act. The Town will advise Proponents of any compliance deficiencies and the time allowed to rectify the same. The Town will not enter into an Agreement with a Proponent where the deficiencies remain outstanding.

3.7 Outstanding Issues Negotiation

After the Proposal Evaluation, but prior to notifying Proponents of the successful Proponent, the Town may, starting with the highest-ranking Proponent, enter into sequential negotiations in an attempt to resolve outstanding issues. If necessary, the Town may enter into sequential negotiations with other Proponent(s) in order of ranking. If the Town is unable to successfully conclude negotiations, the Town reserves the right, in its sole discretion, to:

- Cancel this RFP without award or compensation to Proponents, their officers, directors, employees or agents; or,
- Reissue to compliant Proponents updated competitive process documents, in whole or in part, and request compliant Proponents to resubmit Proposals, in whole or in part.

The Town will inform Proponents of its intent to enter into Outstanding Issues Negotiation with the Proponent.

4 PROPONENT RESPONSE INSTRUCTIONS

4.1 Introduction

This Section outlines the information the Town requests the Proponent to provide in its Proposal. Failure to provide all the information may result in disqualification from the competitive process.

4.2 Proposal Organization

The Town requests the Proponent's Proposal be organized as outlined below. This will facilitate the Town's evaluation.

If the Proponent wishes to include additional information on any point that is somewhat voluminous or that is not directly relevant to the specific situation described in this RFP, that information should be placed in the section entitled "Additional Information" (Appendix G).

Proponents shall build their respective proposals in the following format:

APPENDIX A – WORKBOOK (The Proposal Body shall not exceed a maximum of 40 Pages)

4.2.1 Letter of Transmittal

A Letter of Transmittal or covering letter, dated and signed by an official authorized to negotiate, make commitments, and provide any clarifications with respect to the proposal on behalf of the vendor.

4.2.2 Executive Summary

An Executive Summary, touching on pertinent points in the proposal you wish to highlight.

4.2.3 Corporate Profile, Qualifications and Experience

Corporate information, experience, profile, history and suitability for providing the services related to this RFP;

Clearly identified management and reporting structure including structure or process for escalation concerns;

Measures and practices employed to maintain schedule and cost control for project(s);

Identified methods to mitigate cost overruns and possible change orders;

4.2.4 Key Staff Qualification, and Experience / Resources

Identify key staff's qualification, experience and resources.

4.2.5 Past Projects (x3)

The Proponent are to provide three (3) past projects which demonstrate knowledge and expertise.

4.2.6 Health, Safety and Environment Framework

Describe the Proponent's Health, Safety and Environment framework

APPENDIX B – CERTIFICATION

APPENDIX C – STANDARD AGREEMENT TEMPLATE

APPENDIX D – INSURANCE REQUIREMENTS

APPENDIX E – CLIENT REFERENCES

The Proponent shall include a list of three (3) references, all of which shall be municipal, with their proposal package. Each of the references shall include the complete municipality's name, contact person complete with title, and phone number including area code. The references will reflect municipalities to whom similar consulting work has been provided.

APPENDIX F – ADDENDA ACKNOWLEDGMENT

APPENDIX G – ADDITIONAL INFORMATION (Maximum of 12 Pages - this includes the required document below)

- A copy of the COR

APPENDIX A – Workbook (Max. 40 pages)

Each respondent is required to complete and provide a Submission Workbook (Labelled Appendix A). The workbook (Appendix A) is to be presented as described in section 4.2 of this RFP document.

APPENDIX B – CERTIFICATION

Proponents are requested to sign and return this form with their Proposal

Failure to complete, sign and submit this certification, with the proposal package, shall disqualify this Proposal.

We _____

(Legal Company Name)

of _____

(Business address)

(Telephone number)

(E-mail Address)

Having examined and read the proposal documents for ED-2023-001 as issued by the Town of Edson, do hereby bid and agree to provide the services/products in accordance with the proposal/RFP documents, and do hereby agree to accept the terms and conditions set out in this Request for Proposal.

Executed this _____ day of _____, 2023

Signature of authorized representative

(Print or Type) name and status of authorized representative

The personal information provided by you is being collected under the authority of the *Municipal Government Act* and will be used for the purposes under that Act. The personal information that you provide may be made public, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

APPENDIX C – Standard Agreement Template

The following file is provided separately and forms part of this RFP, and will form the initial basis for Agreement negotiations in accordance with this RFP:

- Standard Consulting Agreement V2023.04

APPENDIX D – Insurance Requirements

Proponents shall sign and return this form with their Proposal

Generic Requirements:

General Liability Insurance with a policy limit of \$2,000,000 per occurrence. The policy must:

1. List the Town as an additional insured
2. Contain a cross liability clause
3. Contain a contractual liability clause
4. Contain a non-owned automobile clause
5. Include a waiver of subrogation in favour of the Town
6. Be endorsed to provide the Town with 30 days' written notice of cancellation
7. Have a reasonable deductible (at the determination of the Town), with the Consultant to be responsible for payment of all deductibles

Professional Liability Insurance (Errors and Omissions) with a policy limit of \$1,000,000 per occurrence.

Automobile Liability Insurance on all vehicles owned, operated, or licensed in the consultant's name, with limits of not less than \$2,000,000 per occurrence.

INSURANCE

INSURANCE BROKER (AGENT): _____

ADDRESS: _____

TELEPHONE NO.: _____

EMAIL ADDRESS:

By signing below as a requirement of the Town, the successful proponent agree to maintain the minimum insurance requirements as stated above throughout the duration of the project.

Signature of Respondent Representative

Name and Title

I have authority to bind the respondent

Date: _____

APPENDIX E – Client References

Client	Contact Name & Position	Phone Number	Project Overview	Date Services Provided (from: to)

*Response for Proposal and provision of references constitutes authorization for the Town to contact references. The Town therefore reserves the right to contact references without further permission from the consultant. The references will only be accepted based on projects completed for municipal government.



APPENDIX F – ADDENDA ACKNOWLEDGMENT

The following Addenda have been received. The modifications to the RFP documents noted therein have been considered and the effects are included in the Proposal prices.

Note: The Town requests the Proponent acknowledge receipt of all Addenda by completing and returning Appendix A with the Proposal.

<u>Addendum #</u>	(check)	<u>Received</u>	<u>Date of Acknowledgement</u>
Addendum # 1		Received	
Addendum # 2		Received	
Addendum # 3		Received	
Addendum # 4		Received	
Addendum # 5		Received	
Addendum # 6		Received	
Addendum # 7		Received	
Addendum # 8		Received	

Signature of Respondent

Printed Name of Respondent

Date



APPENDIX G – Additional Information