



REQUEST FOR PROPOSAL
Housing Needs Assessment Report and
Housing Strategy

(RFP CS 2024 007)
Corporate Services Division

RFP ISSUE DATE:	July 11, 2024
RFP CLOSING DATE:	August 1, 2024
RFP CLOSING TIME:	14:00:59 MST

Key Dates

RFP posted on APC (Alberta Purchasing Connection)	July 11, 2024
Deadline for Proponent's questions	July 22, 2024 at 14:00:59 P.M. (MST)
If Required, Final Addendum posting	July 26, 2024 at 14:00:59 P.M. (MST)
Submission Closing Date & Time	August 1, 2024 14:00:59 P.M. (MST)
If Required, Proponent's proposal clarifications	August 6, 2024 to August 9, 2024
Successful Proponent notification	August 22, 2024
Project Completion Date	September 1, 2024 – May 30, 2025

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1. INTRODUCTION

1.1. Invitation to Proponents

This Request for Proposals (the “RFP”) is an invitation by the Town of Edson (the “Town”) to submit non-binding proposals for the provision of **Housing Needs Assessment Report and Housing Strategy** (the Deliverables) as set out in this section of the RFP. The selected Proponent will be requested to enter into negotiations for an agreement with the Town for the provision of the Deliverables as further described in Section 2 – Deliverables (the “Deliverables”).

Depending upon the results and outcome of the deliverables of the project expressed in this RFP document, additional related work unforeseen at this time may come into existence. The Town reserves the right to either utilize the services of the successful Proponent for additional related work, subject to the successful Proponent’s performance and successful negotiation, or return to the market with a new Request for Proposal document when in the Town’s best interest.

1.2. Town of Edson

A community of 8,374 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. Further details on the Town can be found on our website at www.edson.ca

1.3. Background

The Town has never completed any studies or work on housing and needs to better understand the current state of housing in the community to identify gaps and create a strategy to meet the needs of the community today and into the future.

1.4. Definitions

In this Request for Proposals, in addition to any words defined above,

“**Addendum**” and “**Addenda**” mean additional information or amendments to this RFP, issued by the Town.

“**Agreement**” means the written agreement between the Town and the successful Proponent resulting from this RFP.

“**Closing Date and Time**” means the date and time that Proposals to this RFP must be received.

“Conflict of Interest” includes, but is not limited to, any situation or circumstance where:

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

“Contact Person” means the person named in Section 3.3 – Enquiries.

“Deliverables” means the goods and/or services that the Town seeks to be provided by the Supplier, as further defined in Section 2 – Deliverables.

“Evaluation Committee” means the team of qualified staff appointed by the Town to review and assess Proposals.

“Must”, “Mandatory”, or “Required” means a requirement that must be met in order for a Proposal to receive consideration.

“Proponent” means a person or entity that submits a Proposal in response to this RFP. **“Proposal”** means a response submitted to this RFP.

“Request for Proposal” or “RFP” means this Request for Proposals and includes the documents listed in the index and any modifications thereof or additions thereto incorporated by addendum before August 1, 2024 14:00:59 MST.

“Section” means the numbered section of the referenced part of this RFP.

“Supplier” means the successful Proponent, the individual firm, co-partnership, or corporation retained by the Town to perform the Deliverables in accordance with the Agreement.

2. SCOPE OF WORK

2.1. Description of Services Required

The Town of Edson is seeking proposals from qualified consultants to conduct a Housing Needs Assessment Report and Housing Strategy. It is intended that both the Housing Needs Assessment and the Housing Strategy will assist the Town in its strategic direction, updates to existing policy and bylaws, and future related policy development.

There are existing social housing developments and non-profit and non-government organizations that are integral to the success of affordable/attainable housing in the Town. We value their involvement and actions and want to see housing groups form and inform and help implement our Strategy. We also value our construction and development community and want to also see them be a part of this process and Strategy in some way.

We see the spectrum of housing options and affordable/attainable housing as an integral part of living up to our vision and our citizens’ quality of life. And we see the housing needs assessment report providing invaluable data that will inform the Housing Strategy. We also want the Housing Strategy to address key needs for those most in need and provide approaches that will address our housing gaps in the community.

The work for Housing Needs Assessment Report will complete data collection, analysis and reporting, and set up a data collection system or method for future reporting and analysis, and will be used to inform the key areas of focus for the Town's Housing Strategy.

For the Housing Strategy Proponents are encouraged to be creative and respond to the range of needs identified through this project. The intent of the Housing Strategy is to give clear, appropriate, and attainable strategies and approaches for housing in Edson. The process must be inclusive and address the range and diversity of housing needs to reflect the diversity and most critical and largest needs of our community.

The following are questions to illustrate the scope and suggested areas that the Housing Strategy could explore and recommend, and is not limited to:

- What types of affordable/attainable housing is most needed based on the housing spectrum?
- What types of affordable/attainable housing should be most actively pursued/is a priority given the Town's market conditions, housing need, available funding, and land availability?
- What are specific actions for key groups, for example the Town (local government), public, NGO/NPO, developers, and housing providers?
- What are existing tools and mechanisms available to the Town, and that are appropriate and replicable in Edson? For example, leveraging real estate taxation tools (allocations, escrow interest) for funds and grants.

2.2. Term of Engagement

The successful Proponent should be prepared to commence work immediately after the Agreement is awarded and shall complete the work by May 30, 2025.

2.3. Budget

The Town is not disclosing a budget for the Deliverables as part of this RFP process. Proponents should provide their required remuneration as part of their Proposal.

2.4. Innovation and Value-Added Services

Provide a summary of Innovation and Value-Added Services you may want the proposals to include.

2.5. Supplier Requirements

The Supplier shall provide the Town with proof of the following prior to beginning work on this Project:

- A Town of Edson Business Licence is required to allow the proponent to perform work in Edson.
- WCB Alberta Clearance Letter addressed to the Town of Edson indicating that the account is active and in good standing.
- Commercial General Liability Insurance coverage in the amount of \$2,000,000 per occurrence as per the requirements detailed in Appendix A – Form of Agreement.
- All other insurance requirements as per Appendix E – Insurance Requirement and as detailed in Appendix A – Form of Agreement.

For clarity, a Proponent is not required to be in possession of all of the above at the time of submitting a Proposal, but if they are the successful Proponent and invited to enter into an Agreement, they must be prepared to obtain the above and provide proof to the Town.

3. RFP PROCESS

3.1. Schedule of Events

Event:	Date:
Issue Date of this RFP	July 11, 2024
Deadline for Questions	July 22, 2024 – 14:00:59
Anticipated Last Day to issue Addenda	July 26, 2024
RFP Closing Date and Time	August 1, 2024 at 14:00:59 MST
Anticipated Notice of Award	August 22, 2024
Project Completion Date	September 1, 2024 – May 31, 2025

The above dates are subject to change at the discretion of the Town.

3.2. Site Meeting Details

No site meeting will be held for this RFP. Proponents should submit any questions they may have in accordance with Section 3.3.

3.3. Enquiries

The point of contact at the Town of Edson for any queries or questions related to this RFP (RFP Contact Person) is:

Attention: Chris Chapates, GM Corporate Services
Email: chrisc@edson.ca
Address: P.O. Box 6300
605 - 50 Street
Edson, AB T7E 1T7

Proponents should contact the RFP Contact Person with any questions, in writing, by email only, prior to the Deadline for Questions noted in Section 3.1 – RFP Schedule. This will allow the Town, at its discretion, to issue addendum prior to the Anticipated Last Date to Issue Addenda. Questions received after the Deadline for Questions will be addressed if time permits.

Verbal discussion between Town staff and a Proponent shall not become part of the RFP unless confirmed by a written Addendum. The Town shall not be held responsible for any misunderstanding by the Proponent.

3.4. Proponents to Review RFP

Proponents shall carefully review the RFP documents immediately upon receipt of the RFP and report any errors, omissions, or ambiguities, and ask any questions that will further their understanding of the request. The Proponent is solely responsible to seek clarification from the Town on any matter it considers to be unclear and Proponents are to rely on their own independent analysis in preparing a submission.

It is the Proponent’s responsibility to determine if, as part of their evaluation of this assignment and the preparation of their Proposal, they need to request access to any information included in this RFP. If there are any services that are not included in the Deliverables, but which the Proponent deems necessary to successfully complete this assignment, the Proponent should advise the RFP Contract Person.

3.5. All New Information by way of Addenda

This RFP may only be amended by way of an Addendum issued in accordance with this Section. At any time up until the Closing Date and Time, the Town may issue an Addendum in order to amend, clarify, or answer questions to this RFP. Each Addendum will be issued at the same location and in the same manner as this RFP document (i.e., on the Town of Edson website at <https://www.edson.ca/business/tenders-rfps> and APC).

Each Addendum will form an integral part of this RFP. Proponents are solely responsible for checking for Addenda up until the Closing Date and Time. If the Town deems it necessary to issue an Addendum after the Anticipated Last Day to Issue Addenda, as detailed in Section 3.1, then the Town may extend the Closing Date and Time in order to provide Proponents with more time to complete their Proposal.

Proponents must confirm receipt of all Addenda on Appendix B – Submission Form, to be submitted as part of their Proposal.

3.6. Conflict of Interest

The Proponent shall not engage in any Conflict-of-Interest communications. Proponents should note that Proposals will not be evaluated if the Proponent's current or past corporate or other interest may, in the Town's opinion, give rise to a conflict of interest in connection with the RFP.

3.7. Qualifications

By submitting a Proposal, the Proponent is representing that it has the competence, qualifications, and relevant experience to carry out the work and will employ the same experienced staff to efficiently and safely perform the Deliverables.

3.8. Submission of Proposals

Proponents will submit their Proposal to this RFP either by mailing or emailing a digital copy of their proposal to the RFP Contact Person as detailed in Section 3.3 – Enquiries. The Town shall not be responsible for incomplete or misdirected Proposals due to electronic technical or other problem arising out of the Proponent's submission.

Proposals submitted in any other manner will not be accepted.

Proposals must be received no later than the RFP Closing Date and Time detailed in Section 3.1. It is solely the responsibility of the Proponent to ensure that the Proposal is received on time.

3.9. Amendment or Withdrawal of a Proposal

A Proponent may amend a Proposal at any time up until the RFP Closing Date and Time by sending their amended Proposal to the RFP Contact Person via the methods outlined in Section 3.8 above. Amended Proposals must be clearly identified as amendments.

A Proponent may withdraw a Proposal that is already submitted at any time up until the RFP Closing Date and Time by contacting the RFP Contact Person via the methods outlined in Section 3.8 above.

3.10. Remedy Period

Notwithstanding the requirements for mandatory criteria and scored criteria, the Town may, in its sole discretion, provide written notification to a Proponent that identifies any of the mandatory or recommended requirements not met and provides the Proponent with five (5) calendar days to remedy and supply the requirements. This option to remedy missing requirements shall be exercised at the absolute discretion of the Town and does not apply to Proposals received after the Closing Date and Time.

3.11. Clarification and Verification

At any point in the evaluation process, the Town may, at its sole option, request further details or clarification from the Proponent and/or third parties on aspects of a Proposal by way of a written request for clarification. The written request shall clearly state the required clarification and time limit to supply the information requested. Following receipt of the clarification information, the Town may use this information to reassess and/or re-score the Proposal according to the scored criteria.

Proponents should note that the Town, in addition to any other remedies it may have at law or in equity, reserves the right to rescind any contract awarded to a Proponent in the event that the Town determines that the Proponent made a misrepresentation or provided any inaccurate, misleading, or incomplete information in its proposal or during contract negotiations.

4. EVALUATION OF PROPOSALS AND AWARD OF AGREEMENT

The Town will conduct the evaluation of Proposals and selection of a successful Proponent in accordance with the process detailed in this Section. Evaluation of Proposals will be by a Proposal Evaluation Committee. The Town’s intent is to enter into an Agreement with the Proponent who has met all mandatory criteria and minimum scores, and who has the highest overall ranking based on this evaluation process.

4.1. Stage I – Compliance Review

Prior to the evaluation of Proposals, the Town will review each Proposal to determine if it complies with the submission instructions and mandatory requirements provided in this RFP. If, in the sole discretion of the Town, a Proposal does not materially comply with the requirements set out in this RFP and/or the Town determines that there is a material or perceived conflict of interest, the Proposal will be disqualified from further consideration.

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration in the evaluation process.

Mandatory Criteria:	
1	The Proposal must be received by the Closing Date and Time, in accordance with the requirements of Section 3.1 – Schedule of Events
2	The Proposal must be submitted in accordance with the requirements of Section 3.8 – Submission of Proposals
3	The Proposal must include the following completed forms: Appendix B – Submission Form Appendix C – Pricing Form
4	The Proposal must include the information requested on the following forms either on the forms or in a format of their choice: Appendix D – Rated Criteria Form

4.2. Stage II – Evaluation of Rated Criteria

Proposals that are deemed compliant after Stage I will be evaluated in Stage II. The evaluation team will establish the Stage II score using the following criteria. Rated criteria are set out in Appendix D – Rated Criteria Form.

Scored Criteria		Weighting (Points)
Quality of Proposal	<ul style="list-style-type: none"> General impression, clarity, free from errors, format, use of plain language principles, use of graphics to support text 	10 % (0-10)
Methodology	<ul style="list-style-type: none"> Demonstrate a clear understanding of the necessary content and process of developing a Land Use Bylaw in Alberta by describing the key issues and considerations the Proponent understands. Provide particular attention to consultation and engagement approaches and technical considerations. Provide a schedule outlining specific dates for key activities and required deliverables. 	30% (0-10)
Project Team	<ul style="list-style-type: none"> Describe the applicable skill sets, professional planning credentials, and demonstrated experience in similar projects. 	30% (0-10)
Related Project Experience	<ul style="list-style-type: none"> Similar projects in small urban Alberta municipalities Detail experience and provide examples of work your firm has undertaken on up to three similar projects highlighting innovative or cost effective solutions. 	20% (0-10)
Total		

Any Proposal not meeting a threshold score will not be given further consideration.

Scoring Methodology

Each criterion will be scored by the evaluation committee as a percentage out of 100, which will then be multiplied by the weighting to provide a weighted score.

4.3. Stage III – Evaluation of Pricing

At the conclusion of Stage II, any proposals that have met the minimum scores and minimum overall threshold requirement will advance to Stage III – Pricing Evaluation.

Scored Criteria		Weighting (Points)
Total Contract Price	Overall Project Cost	10% (0-10)
	Overall value to the Town	

Scoring Methodology

Score	Description
0	Lack of response or lack of understanding of requirements. Significantly below criteria required for success. Many deficiencies. No or low probability of success.
2	Does not meet expectations or demonstrate clear understanding of requirements. Insufficient or incomplete information. Generally, does not meet criteria relative to quality. Does not describe or demonstrate a sufficient range of skills or experience. Less than acceptable. Significant concerns related to ability to successfully complete the project.
4	Somewhat meets expectations. Some major and minor weaknesses or deficiencies. Weak Proposal. May demonstrate large gaps in expectations. Some major concerns may exist.
6	Generally satisfactory, acceptable, or described as average. Minor weaknesses or deficiencies. Adequate for effective performance. No major concerns.
8	Meets expectations. More than adequate for effective performance. Generally, meets or exceeds expectations. No major or minor weaknesses or deficiencies. Demonstrates the full range of understanding, skills, and experience desired. High probability of success.
10	Exceeds expectations. Proponent clearly understands requirements. Innovative approaches, skills, and experiences. Excellent probability of success.

4.4. Stage IV – Cumulative Score and Selection of Highest Scoring Proponent

At the conclusion of Stage III, each Proposal’s weighted scores will be added together, and Proposals will be ranked according to their total weighted scores. Subject to the express and implied rights of the Town, the highest scoring Proponent will be selected to enter into an agreement based on the Form of Agreement attached as Appendix A of this RFP unless the Town wishes to proceed with Interviews as per Section 4.5 below. In the event that two or more Proposals have an equal total weighted score, Proponents may be invited for interviews/presentations or may be asked to submit a Best and Final Offer; otherwise, the Proponent with the lowest total price will be invited to enter into an Agreement with the Town.

Stage IV – Cumulative Scores	Weighting (Points)
Stage II Score	90% (0-90)
Stage III Score	10% (0-10)
Total Points	100

4.5. Stage V – Interviews / Presentations

The Town, at its sole discretion, or in the event of a tied score between Proponents, may shortlist the Proponents and may invite one or more Proponents to an interview in order to further evaluate the Proposal(s).

Any interview that takes place will be evaluated out of an additional 25 points for a revised total available proposal score of 125 points. The Town reserves the right, at its sole discretion, to adjust the initial evaluation scores up or down following the interview.

4.6. Negotiations and Execution of an Agreement

Neither the Town nor any Proponent will be legally bound to provide or purchase the Deliverables until the execution of a written Agreement.

The Town will invite the top ranked Proponent to enter into discussions with a view to concluding an Agreement. The terms and conditions found in the Form of Agreement (Appendix A) are to form the basis for commencing negotiations between the Town and the selected Proponent. In no event will the Town be required to offer any modified terms to any other Proponent prior to entering into an agreement with a Proponent and the Town shall incur no liability to any other Proponent as a result of such negotiation or modifications. No Proponent shall have any rights against the Town arising from such negotiations.

It is the intent of the Town to ensure it has the flexibility it needs to arrive at a mutually acceptable Agreement. Negotiations may include, among other things:

- Clarifications or amendments to the scope of goods/services, plus any resulting price adjustments.
- Social and environmental aspects.
- Innovations.
- Amendments to the terms and conditions of the Form of Agreement (included as Appendix A), based on items submitted in the Proposal.

Proposals should remain valid for a period of sixty (60) days following the Closing Date and Time of this RFP.

The Town would seek to execute an Agreement within 15 days of issuing an invitation to the Proponent to conclude an Agreement. If the Town and the preferred Proponent cannot negotiate a successful Agreement within this time period, the Town may terminate negotiations with that Proponent and invite the next-highest-ranked Proponent to conclude an Agreement. The Town may then continue this process until an Agreement is executed, or there are no further Proponents, or the Town otherwise elects to cancel the RFP process entirely. For clarity, the Town may discontinue discussions with a Proponent if at any time the Town is of the view that it will not be able to conclude an Agreement with that Proponent.

The Town may rescind an award if the Proponent is unable to provide the adequate business and insurance documents, as requested under Section 2.5 – Supplier Requirements.

5. TERMS AND CONDITIONS OF RFP PROCESS

5.1. Not a Tender Call

This RFP is not a tender call and the submission of any response to this RFP does not create a tender process. This RFP is not an invitation for an offer to contract made by the Town.

By this RFP, the Town reserves itself the absolute and unfettered discretion to invite Proposals, consider and analyze submissions, select short-listed Proponents, or attempt to negotiate an Agreement with the successful Proponent as the Town considers desirable. Proposal submission by a Proponent and its subsequent receipt by the Town does not represent a commitment on the part of the Town to proceed further with any Proponent or project.

5.2. No Obligation to Proceed

Though the Town fully intends, at this time, to proceed through the RFP, the Town is under no obligation to award an Agreement as a result of this RFP. The receipt by the Town of any information (including any submissions, ideas, plans, drawing, models, or other materials communicated or exhibited by any intended Proponent or on its behalf) shall not impose any obligations on the Town. There is no guarantee by the Town, its officers, employees, or agents, that the process initiated by the issuance of this RFP will continue, or that this RFP process or any RFP process will result in an Agreement with the Town.

5.3. Limitation of Liability

No representation, warranty or undertaking, expressed or implied, is or will be made by, and no responsibility is or will be accepted by, the Town in relation to this RFP or the completeness or accuracy of any information presented in the RFP.

5.4. Procedural Rights of the Town

The Town has the right, at its sole discretion, at any time, either before or after the Closing Date and Time, to:

- a) accept, reject, or disqualify any Proposal;
- b) determine whether a Proposal is in compliance with the RFP or whether a failure to comply is material or not;
- c) if only one Proposal is received, elect to accept it, reject it, and/or re-issue the RFP documents for re-bid without revising the existing RFP documents;
- d) alter or amend any aspect of the RFP;
- e) seek clarification or request further information or documentation from any or all Proponents, or from third parties;
- f) elect not to proceed with the RFP;
- g) cancel this RFP and subsequently call for new submissions for the subject matter of this RFP (including any portion thereof);
- h) select one or more than one Proponent for the performance of all or any part of the goods and/or services that are the subject matter of the RFP;
- i) decline to enter into an Agreement with any Proponent if the Town is of the opinion that the Proponent submitted pricing that is too low to be sustainable and/or the successful provision of the Deliverables according to the RFP would be in jeopardy; and,
- j) cancel its decision to enter into an agreement with any Proponent in the event of any material change with the respect to the Proponent's Proposal that has not been approved by the Town;

in each case without any liability for costs, expenses or damages incurred or suffered by any Proponent or entity.

5.5. Pricing

Proponents shall deduct any applicable government discounts and quote firm net prices. All prices quoted shall be in Canadian funds, F.O.B. destination, freight and duty prepaid. The Supplier will pay for the full cost of any and all transportation of the goods from point of origin in any country to the specified Town location, including, but not limited to, inland haulage, any and all customs clearance fees, duties, taxes, documentation charges, demurrage if any, port handling charges and any unloading fees. Supplier pays and bears freight charges, and the Supplier owns goods in transit and files any claims. The material delivered in response to Town orders shall remain the property of the Supplier until a full physical inspection is made by the Town and the material accepted to the satisfaction of the Town. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging.

Where applicable, Proponents shall give both unit prices and extended totals. The Town reserves the right to correct a patent computational or other mathematical error evident on the face of the bid, however, unit prices will not be adjusted. In the case of a discrepancy in computing the amount of a proposal, the unit price will govern over extended totals.

While the pricing information provided in Proposals will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation and ranking of the Proposals. Any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation or ranking or the decision of the Town to enter into an agreement for the Deliverables.

The Town may elect to evaluate pricing on the basis of the total cost of ownership. In using life cycle costing, factors such as the following may be considered: initial purchase pricing including shipping and handling, installation, training, warranties, duration of useful life and all reasonable operating costs (fuel/energy use, water use, routine maintenance, consumable supplies, parts and repairs), direct and indirect labour required, energy usage, environmental impact, social costs or benefits, disposal costs, transitional costs, residual value, etc. The Town reserves the right to use those or other applicable criteria that, in its sole opinion, will most accurately estimate total cost of use and ownership.

5.6. Disqualification

The Town may, at its sole discretion, disqualify a proposal or cancel its decision to award to any Proponent under this RFP process, at any time prior to or after the execution of an agreement, if:

- a) the Proponent or Proposal is not materially compliant with any part of this RFP;
- b) the Proponent fails to cooperate in any attempt by the Town to verify any information provided by the Proponent in its Proposal;
- c) the Proposal, in the opinion of the Town, contains false, misleading, or misrepresented information;
- d) the Proposal, in the opinion of the Town, reveals a real, foreseeable, or perceivable conflict of interest;
- e) there is evidence that the Proponent, its employees, agents, suppliers, or representatives colluded with one or more other Proponents or any of its respective employees, agents, suppliers or representatives in the preparation or submission of Proposals;
- f) the Proponent has been responsible for significant or persistent deficiencies in performance of any substantive requirement or obligation under a prior contract or contracts with the Town or any other party;
- g) there is evidence of professional misconduct or acts or omissions that adversely reflect on the commercial integrity of the Proponent;
- h) there is evidence that the Proponent was convicted of a criminal offence or other serious offences; or
- i) the Proponent has filed for bankruptcy.

5.7. Best and Final Offer

At its sole discretion, the Town may provide Proponents with an opportunity to provide a Best and Final Offer (“BAFO”). The BAFO process represents an optional step in the Supplier selection process. BAFOs may be useful, for example, when no single response addresses all the specifications, when shortlisted proposals are over budget, when two or more Proponents are tied or nearly tied (e.g., 1% apart or less) after the evaluation process, or when Proponents submitted responses that are unclear or deficient in one or more areas.

The Town may restrict the number of Proponents invited to submit a BAFO or may offer the option to all Proponents. In either case, the Town will provide the same information and the same submission requirements to all Proponents chosen to submit a BAFO. Proponents may be asked to review their offers, provide additional clarification to specific sections of the RFP, or respond to an updated scope of Deliverables.

If a BAFO is requested, submitting a BAFO response is optional. Those choosing not to submit a BAFO should submit a written response notifying the Town that their response remains as originally submitted.

A BAFO may be submitted only once and the terms of the BAFO will not identify either the current rank of any of the Proponents selected for a BAFO or the offers currently proposed.

5.8. Proposals in English

All Proposals are to be in the English language only.

5.9. Only One Entity as Proponent

The Town will accept Proposals where more than one organization or individual is proposed to deliver the Deliverables, so long as the Proposal identifies only one entity that will be the lead entity and will be the Proponent with the sole responsibility to perform the Agreement if executed. The Town will only enter into an Agreement with that one Proponent. Any other entity involved in delivering the Service should be listed as a subcontractor. The Proponent may include the subcontractor and its resources as part of the Proposal and the Town will accept this, as presented in the Proposal, in order to perform the evaluation. All subcontractors to be used in the Service must be clearly identified in the Proposal.

5.10. Proposals to Contain All Content in Prescribed Forms

All information that Proponents wish to be evaluated must be contained within the submitted Proposal. Proposals should not reference external content in other documents or websites. The Town may not consider any information that is not submitted within the Proposal or within the pre-prescribed forms set out in this RFP.

5.11. Information in RFP Only an Estimate

While the Town has made every effort to ensure the accuracy of the information contained in this RFP, the Town makes no representations, warranties, or guarantees as to the accuracy of the information provided. Any quantities or measurements provided are estimates only and are provided to describe the general nature and scale of the Deliverables. Proponents must obtain all information they deem necessary, including verification of quantities or measurements, in order to prepare a Proposal.

5.12. Proponent Expenses

Proponents are solely responsible for their own expenses in participating in this RFP process, including costs in preparing a Proposal and for subsequent finalizations of an agreement with the Town, if required. The Town will not be liable to any Proponent for any claims, whether for costs, expenses, damages, or losses incurred by the Proponent in preparing its Proposal, loss of anticipated profit in connection with any final Agreement, or any matter whatsoever, including any actual or alleged unfairness on the part of the Town at any stage of the Request for Proposal process.

5.13. Retention of Proposals

All Proposals submitted to the Town will not be returned and will be retained in accordance with the *Freedom of Information and Protection of Privacy Act*.

5.14. Notification and Feedback to Unsuccessful Proponents

At any time until or after the execution of a written Agreement with the Supplier, the Town may notify unsuccessful Proponents in writing that they have not been selected to conclude an Agreement.

Unsuccessful Proponents may then request a debriefing with the Town's RFP Contact Person in order to obtain feedback on how their Proposal fared in the evaluation. Such requests for feedback should be made within sixty (60) days of notification of the RFP results to the unsuccessful Proponent. Details of feedback provided will be at the Town's sole discretion in order to protect the confidentiality of other Proponents and the Town's commercial interest.

5.15. Proponent Not to Communicate with Media

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

5.16. Procurement Protest Procedure

If a Proponent wishes to challenge the RFP process, it should provide written notice to the RFP Contact Person in accordance with any applicable procurement protest mechanisms. The notice must provide a detailed explanation of the Proponent's concerns with the procurement process or its outcome.

5.17. Conflict of Interest

All Proponents must disclose an actual or potential conflict of interest, as set out in Appendix B – Submission Form. The Town may, at its sole discretion, disqualify any Proponent from this RFP process, if it determines that the Proponent's conduct, situation, relationship (including relationships of the Proponent's employees and Town employees) create or could be perceived to create a conflict of interest.

The Town may rescind or terminate an Agreement entered into if it subsequently determines that the Proponent failed to declare an actual or potential conflict of interest during this RFP process, as required under Appendix B – Submission Form.

5.18. No Lobbying

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

5.19. Illegal or Unethical Conduct

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

5.20. Confidentiality of Town Information

Information pertaining to the Town obtained by the Proponent as a result of participation in this RFP process is confidential and must not be disclosed without written authorization from the Town.

All Proponents and any other persons who, through this RFP process, gains access to the Town's confidential information, are required to keep all information strictly confidential, which in any way reveals confidential business, financial or investment details, programs, strategies, or plans learned through this RFP process. This requirement will continue with respect to such information learned by the Supplier, if any, over the course of the Agreement.

5.21. Confidentiality of Proponent Information

Proponents should note that in accordance with the provisions of *Freedom of Information and Protection of Privacy Act* ("FOIPPA"), certain details of this RFP and any executed Agreement may be made public, including the Supplier's name and total Agreement price. Proponents should be aware of and review the Town's obligations under FOIPPA and the Town's limited ability to refuse to disclose third party information pursuant to section 21 of FOIPPA.

Proponents are advised that their Proposals or Agreement details may, as necessary, be disclosed on a confidential basis to advisers retained by the Town to advise or assist with the RFP process or other matters.

5.22. No Contract A and No Claims

This RFP process is not intended to create any contractual obligations whatsoever (including what is commonly referred to as 'Contract A') shall arise between the Town and any Proponent upon the submission of a Proposal in response to this RFP. For extra clarity, both the Proponent and the Town are free to cancel their participation in this RFP process at any time up until the execution of a written Agreement for the Deliverables.

Without limiting the above paragraph, no Proponent shall have any claim whatsoever against the Town for any damage or other loss resulting from a Proponent's participation in this RFP, including where the Town does not comply with any aspect of this RFP and including any claim for loss of profits or Proposal preparation costs should the Town not execute an Agreement with the Proponent for any reason whatsoever.

5.23. Governing Law and Trade Agreements

This RFP is governed by the laws of the Province of Alberta and any other agreements that exist between the Province of Alberta and other jurisdictions.



605 - 50th Street
P.O. Box 6300
Edson, AB T7E 1T7
www.edson.ca



APPENDIX A – FORM OF AGREEMENT

The form of the agreement to be used as the basis for contract negotiations with the successful bidder, if any, is included as an attachment to this Request for Proposals.

Schedule A – Deliverables

The successful Proponent shall be responsible for providing a complete Housing Needs Report and a complete Housing Strategy, which includes but is not limited to the following:

- Incorporate reporting analysis and information from the Housing Needs Assessment Report
- Establish clear and appropriate housing goals, objectives and actions
- Identify priorities in securing housing
- Include realistic goals for short and long-term recommendations/actions
- Identify and utilize available resources, tools and partnerships
- Identify and describe partners and their roles and goals moving forward (Town, citizens, partners, etc.)
- Identify factors that influence housing supply, demand, and provision of housing
- Provide and examine other applicable case studies from other Alberta municipalities
- Quantify the amount of land and/or housing units needed to satisfy housing deficits in our community and to address specific housing challenges (for example, low-income, emergency shelter, middle-income, single household families, low-income seniors, etc.)
- Create a housing inventory for housing, units, type, operator, location, etc.
- Must identify what MDP policies and how they are addressed in the housing strategy
- Must include a review of recent and applicable provincial and national housing plans.
- Must include at least, but not limited to, the following demographic groups: seniors, youth, women and children, homeless, First Nations, newcomers to Canada, low-income, middle-income, temporary worker and student accommodation.
- Clear set of goals and objectives; clearly identifies and explains the roles of various stakeholder groups (Town, provincial agencies, NGO/NPO, developers, etc.)
- Explain the role of stakeholders (staff, council, NGO/NPO, business, developer, etc.).

If any services, deliverables, functions, responsibilities or tasks are not specifically described in this Agreement are:

- a) required for the proper performance of any of the Deliverables, or
- b) are usually performed as part of services that are substantially similar to the Deliverables, such services, deliverables functions, responsibilities and tasks shall be deemed to be included within the scope of the Deliverables to the same extent and in the same manner as if specifically required by this Agreement.



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Schedule B – FEES

The Fees are in Canadian funds. The Fees are firm, fixed fee prices and the Proponent will not be compensated above the total Fees if they find that the Work requires more effort than they had planned for when they prepared their Proposal unless a Scope Change is submitted and approved by the Town.

APPENDIX B – SUBMISSION FORM

Proposals should include this Appendix B – Submission Form

1. Proponent Details:

Full Legal Name of Proponent:	
Other “DBA” Names the Proponent Uses:	
Registered Address:	
Proponent Contact Person Name and Title:	
Contact Person Phone No.:	
Contact Person Email:	

2. Confirmation of Addenda Received:

We have checked the Town of Edson website at <https://www.edson.ca/business/tenders-rfps> and/or Alberta Purchasing Connection for Addenda and confirm receipt of the following Addenda, issued by the Town up to the Closing Date and Time:

Addendum #	Issued on Date:

3. Subcontractors:

Subcontractors to be used for the work are as follows:

Name of Subcontractor	Role on Project

4. Certification and Acknowledgement of RFP Process:

By signing this Appendix B – Submission Form, we the Proponent, certify and acknowledge the following:

- a. We have carefully read and examined this RFP document, including all appendices, and have conducted such other investigations as were prudent and reasonable in preparing this Proposal. We are able to provide the Deliverables and meet the Supplier Requirements detailed in Section 2 for the pricing submitted in this Proposal.
- b. We certify that the statements made in this Proposal are true and submitted in good faith.
- c. We acknowledge and understand that the RFP process and the submission of this Proposal do not give rise to any contractual obligations whatsoever (including what is commonly referred to as 'Contract A') between the Town and us, the Proponent, and that no contractual obligations shall arise between the Town and us, the Proponent, until and unless we execute a written Agreement with the Town.
- d. We certify that we have not engaged in any conduct which would constitute a Conflict of Interest in relation to this RFP process, and that there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP; or, we have disclosed any potential, perceived, or actual conflict of interest below:

[disclose any potential, perceived, or actual conflict of interest]

5. Certification Signature:

The Proponent hereby certifies that the above statements are true and that the individual signing below has the authority to bind the Proponent:

Signature

Name

Title

Date

APPENDIX C – PRICING FORM

Proposals should include this Appendix C – Pricing Form, as well as an Hourly Rate Schedule Breakdown, as described in Section 3 of this Appendix.

1. Pricing Basis:

Pricing entered into the tables of Section 2 below, shall be on the following basis:

All Prices must be in Canadian funds and inclusive of all applicable duties and taxes, except GST which shall be itemized separately where indicated. The prices must be all-inclusive and include for all labour, materials, supplies, site visits, travel, overheads, profit, insurance, expenses, disbursements, and all other costs and fees necessary to deliver the Deliverables.

Proponents acknowledge that, if it is a non-resident company (i.e., not a company registered in Canada), payments to the Proponent, as a non-resident, may be subject to withholding taxes under the Income Tax Act (Canada). Unless a non-resident Proponent provides the Town with an official letter from Canada Revenue Agency waiving the withholding requirements, the Town will withhold the taxes it determines are required under the Income Tax Act (Canada).

The Fixed Fee prices are firm not-to-exceed prices. The Deliverables must be completed for the price submitted. Supplier will not be compensated above the Total Fixed Fee price if they find that the work requires more effort than they had planned for when they prepared their Proposal.

2. Fixed Fee for Deliverables:

For completion of all Deliverables, the Supplier will be compensated the Total Fixed Fee as indicated below.

Deliverables	Fixed Fee
ARO Standard – Implementation	[enter fixed fee]
Subtotal:	[enter subtotal]
Goods and Services Tax (GST)	[enter GST amount]
Total Fixed Fee Price:	[enter TOTAL]

3. Hourly Rates:

Proposals should include an ‘Hourly Rate Schedule’ with this Appendix C and can be in a format of the Proponent’s choosing. The rate schedule should identify the hourly rate by role and experience level as applicable, and where available, identify the personnel associated with the role.

APPENDIX D – RATED CRITERIA FORM

Proposals should include the following sections in this order, with all requested details and supporting documents, either on this form or in a format of your choice.

1. Proponent Profile:

In this section, provide a brief profile of your company, including a description of the history and areas of expertise.

Discuss your company's experience in relevant fields, expanse of other related experience, and strengths relevant to these assignments. Include a narrative as to why the company is well-suited and best qualified to perform the work described in this RFP.

If your company has multiple locations, please identify the corporate head office and any local offices that may be involved in project delivery and coordination.

2. Proposed Team:

In this section, provide the details of the proposed team members that will deliver the Deliverables.

Proposals should identify the manager who the Proponent has appointed to lead the Proponent's project team and who will be the main contact for the Town.

Team Member Name:	Position:	Employee or Subcontractor:	Brief Description Provided:	Resume / Work History Attached:

Provide a brief description of each proposed team member describing their qualifications, experience relevant to the Deliverables and responsibilities for this Project.

Attach a resume or detailed work history for each named team member.

Please note that adjustments to proposed team members following award of the Agreement will require written approval of the Town.

3. Approach and Methodology:

It is the expectation of the Town that the Proposal will include a detailed “Approach and Methodology” section that clearly outlines the approach that the Proponent proposes to complete the Project.

In this section, describe:

Your understanding of the Project, as well as the potential issues and challenges to be addressed. The methodology that you would use to complete this assignment.

Your intended approach and utilization of proposed team members to complete the work, and how you will manage your workloads on other commitments.

Your work plan, including the start and end dates, relevant tasks, meetings, milestones, and deliverables required to complete this Project.

Your approach to communicating with the Town, and how you will ensure that the work will be completed on time and within budget.

Any innovative or value-added services that you propose pursuant to Section 2.4.

4. Experience and References:

In this section, in a format similar to the tables below, Proponents should provide details on three (3) projects completed in the last five (5) years which are the most relevant to the Deliverables. Proponents should note that the Town may contact the client to provide a reference on the experience listed and may amend scoring in the evaluation based on the client's feedback. Positive references will impact scoring positively, and poor or negative references will impact scoring negatively and may be grounds for rejection of a Proposal. Additionally, the Town may consider information regarding the integrity and reliability of a Proponent's services from parties other than those provided in a Proponent's proposal, including the Town's own experience with the Proponent.

Project Experience #1	
Client Name:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
Proposed Team Members on Project:	
Brief Description of Project and Services Proponent Performed:	



Project Experience #2	
Client Name:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
Proposed Team Members on Project:	
Brief Description of Project and Services Proponent Performed:	

Project Experience #3	
Client Name:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
Proposed Team Members on Project:	
Brief Description of Project and Services Proponent Performed:	



APPENDIX E – 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 deductible not exceeding \$5,000, with the Consultant to be responsible for payment of all deductibles

Professional Liability Insurance (Errors and Omissions) with a policy limit of \$2,000,000 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.

By signing below as a requirement of the Town, the successful proponent(s) agree to maintain the minimum insurance requirements as stated above throughout the duration of the Consulting Services Pre-Qualified term ([Insert Date] – {Insert Date})

Signature of Respondent Representative

Name and Title

I have authority to bind the respondent

Date: _____