SCHEDULE C – FORM OF PROPOSAL

**RFP Project Title: Insurance Brokerage Services**

**RFP Reference No.: 1220-030-2024-004**

**Legal Name of Proponent:**

**Contact Person and Title:**

**Business Address:**

**Business Telephone:**

**Business Fax:**

**Business E-Mail Address:**

TO:

City of Surrey

City Representative: Sunny Kaila, Manager, Procurement Services

E-mail for PDF Files: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

Dear Sir:

1. I/We, the undersigned duly authorized representative of the Proponent, having received and carefully reviewed all of the Proposal documents, including the RFP and any issued addenda posted on the City Website and BC Bid Website, and having full knowledge of the Site, and having fully informed ourselves as to the intent, difficulties, facilities and local conditions attendant to performing the Services, submit this Proposal in response to the RFP.
2. **I/We confirm** that the following schedules are attached to and form a part of this Proposal:

Schedule C-1 – Statement of Departures;

Schedule C-2 – Proponent’s Experience, Reputation and Resources;

Schedule C-3 – Proponent’s Technical Proposal (Services);

Schedule C-4 – Proponent's Technical Proposal (Time Schedule); and

Schedule C-5 – Proponent’s Financial Proposal.

**3.0 I/We confirm** that this proposal is accurate and true to best of my/our knowledge.

**4.0** **I/We confirm** that, if I/we am/are awarded a contract, I/we will at all times be the “prime contractor” as provided by the *Worker's Compensation Act (British Columbia)* with respect to the Services. I/we further confirm that if I/we become aware that another consultant at the place(s) of the Services has been designated as the “prime contractor”, I/we will notify the City immediately, and I/we will indemnify and hold the City harmless against any claims, demands, losses, damages, costs, liabilities or expenses suffered by the City in connection with any failure to so notify the City.

**This Proposal** is submitted this **[day]** day of **[month],** **[year].**

**I/We have the authority to bind the Proponent.**

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| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Legal Name of Proponent)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Signature of Authorized Signatory)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Print Name and Position of Authorized Signatory) | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Signature of Authorized Signatory)  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Print Name and Position of Authorized Signatory) |

SCHEDULE C-1 - STATEMENT OF DEPARTURES

**1.** I/We have reviewed the proposed Contract attached to the RFP as Schedule “B”. If requested by the City, I/we would be prepared to enter into that Contract, amended by the following departures (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**2.** The City of Surrey requires that the successful Proponent have the following in place **before commencing the Services**:

(a) Workers’ Compensation Board coverage in good standing and further, if an “Owner Operator” is involved, personal operator protection (P.O.P.) will be provided,

Workers' Compensation Registration Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(b) Prime Contractor qualified coordinator is Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

and Contact Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(c) Insurance coverage for the amounts required in the proposed agreement as a minimum, naming the City as additional insured and generally in compliance with the City’s sample insurance certificate form available on the City’s Website at [www.surrey.ca](http://www.surrey.ca) search [Consultants Certificate of Insurance](http://www.surrey.ca/files/DCT_Consultants_Form_Certificate_of_Insurance_2014.docx);

(d) City of Surrey or Intermunicipal Business License: Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_;

(e) If the Consultant’s Services are subject to GST, the Consultant’s GST Number is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; and

(f) If the Consultant is a company, the company name indicated above is registered with the Registrar of Companies in the Province of British Columbia, Canada, Incorporation Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

As of the date of this Proposal, we advise that we have the ability to meet all of the above requirements **except as follows** (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**3.** I/We offer the following alternates to improve the Services described in the RFP (list, if any):

**Section Requested Departure(s) / Alternative(s)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**4.** The Proponent acknowledges that the departures it has requested in Sections 1, 2 and 3 of this Schedule C‑1 will not form part of the Contract unless and until the City agrees to them in writing by initialling or otherwise specifically consenting in writing to be bound by any of them.

SCHEDULE C-2 - PROPONENT’S EXPERIENCE, REPUTATION AND RESOURCES

Proponents should provide information on the following (use the spaces provided and/or attach additional pages, if necessary):

1. Location of primary business, branch locations, background, stability, structure of the Proponent and number of years business has been operational;
2. Proponent’s relevant experience and qualifications in delivering services similar to those required by the RFP;
3. Provide information regarding the experience and qualifications of the Construction Insurance Team in larger construction projects (i.e., design-bid-build, design-build, an P3) and working collaboratively with partners on projects;
4. Proponent’s demonstrated ability to provide the Services;
5. Proponent’s equipment resources, capability and capacity, as relevant;
6. Proponent’s references (name and telephone number). The City's preference is to have a minimum of three (3) references;

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| --- | --- |
| **Reference #1** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

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| **Reference #2** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

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| **Reference #3** | |
| Name of client’s organization: |  |
| Reference Contact Information: | Name: |
| Phone Number: |
| Email Address: |
| How long has the organization been a client of the Proponent? |  |
| Describe the size and scope of the referenced project. |  |
| Describe the nature of the work performed. |  |
| Provide the start and end dates of the project duration, and any relevant comments. |  |
| Information on any significant obstacles encountered and overcome for this type of park, boulevard and median tree watering services. |  |

1. Proponent’s financial strength (with evidence such as financial statements, bank references);
2. Describe any difficulties or challenges you might anticipate in providing the Services to the City and how you would plan to manage these;
3. Proponent should provide a one-page overview of their two best markets for liability and markets for property to which the Proponent would market the City’s business and the Proponent’s experience in obtaining favourable terms with them;
4. Proponents should provide information on the background and experience of all key personnel proposed to undertake the Services. Proponents are encouraged to provide resumes of the key members of the team. The resumes should be no longer than one page in length, outlining their experience applicable to this account along with a reference for each key member of the team. (use the spaces provided and/or attach additional pages, if necessary):

**Key Personnel**

Name:

Experience:

Dates:

Project Name:

Responsibility:

Dates:

Project Name:

Responsibility:

##### Provide information of the suggested Account Manager, Marketer and Claims Manager of your firm;

**Project Approach – Team Roles**

1. Proponents should provide an outline of the resource roles and estimated effort required for this project. (use the spaces provided and/or attach additional pages, if necessary); and

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| **Role** | **Name** | **Forecasted Project Days/Hrs.** |
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**Sub-Contractors**

1. Proponents should provide the following information on the background and experience of all sub-contractors proposed to undertake a portion of the Services (use the spaces provided and/or attach additional pages, if necessary):

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| **DESCRIPTION OF SERVICES** | **SUB-CONTRACTORS NAME** | **YEARS OF WORKING WITH PROPONENT** | **TELEPHONE NUMBER AND EMAIL** |
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SCHEDULE C-3 - PROPONENT’S TECHNICAL PROPOSAL (SERVICES)

Proponents should provide the following (use the spaces provided and/or attach additional pages, if necessary):

1. a narrative that illustrates an understanding of the City’s requirements and Services;
2. a description of the general approach and methodology that the Proponent would take in performing the Services including specifications and requirements;
3. a narrative that illustrates how the Proponent will complete the scope of Services, manage the Services, and accomplish required objectives within the City’s schedule;
4. a description of the standards to be met by the Proponent in providing the Services;
5. list of reports that you would anticipate providing the City’s management team, including their relationship to project milestones and the method of delivery (electronic, paper, e-mail, other);
6. a service outline, maximum one page per service outline of the consulting services your firm can provide the City;
7. a narrative outlining your firm’s philosophy on independent brokerage and the firm’s policy on contingent commissions and disclosure of commissions;
8. Municipal risk is a special class of risk in both liability and property.  Please identify if your firm offers a manuscript municipal wording for property and/or liability.  If so, please outline the strengths of the manuscript wording over the standard wording;
9. **Customer Service**:

* Provide details about customer service response times and availability;
* Provide details on how your firm will provide the best value to the City. Include any creative, unique and innovative ideas that have been implemented with other clients for similar types of requirements;
* Describe what assistance your firm is willing to make available to assist the City in compiling accurate information and record keeping purposes; and
* Describe how the City will be provided with complete copies of all policies and endorsements and how you plan to communicate the coverage with the City to ensure understanding.

1. **Start up Plan**: Provide a description of your proposed transition plan. Provide a detailed start-up including proposed time frames and resources;

1. **Environmental and Social Responsibility**: Describe your commitment environmental stewardship initiatives, recycling practices and carbon footprint reduction; and,
2. **Value-Added Services**: The Proponent should provide a description of value-added, innovative ideas and unique services that the Proponent can offer to implement the City’s requirements relevant to the scope of services described in this RFP. Unless otherwise stated, it is understood that there are no extra costs for these services.

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SCHEDULE C-4 - PROPONENT’S TECHNICAL PROPOSAL (TIME SCHEDULE)

The City encourages responses that demonstrate a thorough understanding of the nature of the work and what the Proponent must do to get the work done properly. To this end, Proponents should provide an estimated project schedule, with major item descriptions and time indicating a commitment to perform the Services within the time specified (use the spaces provided and/or attach additional pages, if necessary).

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| **ACTIVITY**(Insert Milestone Dates) | **Time from Notice to Proceed in Days** | | | | | | | | | |
| **10** | **20** | **30** | **40** | **50** | **60** | **70** | **80** | **90** | **100** |
| Letter of Intent |  |  |  |  |  |  |  |  |  |  |
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SCHEDULE C-5 - PROPONENT’S FINANCIAL PROPOSAL

Proponents should set out in their Proposal, the proposed fee structure (excluding GST) including a breakdown of the estimated hours to be spent by each individual on the consultant team and the charge out hourly rate for each individual included in their Proposal.

The Fee structure should be tabulated in a spreadsheet format with each task itemized including hourly rates, break out costs as specified for the project and all deliverables, and fees for anything the Proponent would consider additional work. Sub-consultant fees and disbursements should also be itemized.

The annual fee is to be firm for each year of the initial three-year term.

**Fees**

As outlined in Schedule A:

* 1. Transaction Services
  2. Consulting Services
     + Hourly rate for each type of consulting services.
     + Proposed packaged rate for a bundle of consulting services.
  3. Bundled Rate
     + A bundled rate for transaction services and a specified amount and type of consulting services included in the bundle.
     + Hourly rate for additional consulting services.



**Transaction Services**



**Consulting Services**



**Additional Expenses:**

The proposed Contract attached as Schedule "B" to the RFP provides that expenses are to be included within the fee, other than the expenses listed in the Contract as disbursements. Details of disbursements are to be shown in the chart above. Please indicate any expenses that would be payable in addition to the proposed fee and proposed disbursements set out above:

**Payment Terms:**

A cash discount of \_\_\_\_\_\_% will be allowed if account is paid within \_\_\_\_\_\_\_ days, or the \_\_\_\_\_\_\_\_\_ day of the month following, or net 30 days, on a best effort basis.

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