



## **REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS**

Title: Services, Intranet Replacement Project

Reference No.: 1220-050-2023-012

## **FOR PROFESSIONAL SERVICES**

(General Services)

Issue Date: November 6, 2023

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# REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

## 1 INTRODUCTION

### 1.1 Purpose

The purpose of this Request For Expressions of Interest and Statements of Qualifications (the “**RFEOI/SOQ**”) is to:

- (a) invite Submissions from Respondents that describe the desire, expertise and capability of the Respondent to participate in the project described in Schedule A; and
- (b) select a Respondent or Respondent(s) who may be invited to participate in a Request For Proposals process, when called.

### 1.2 Definitions

In this RFEOI/SOQ the following definitions shall apply:

- (a) “**BC Bid Website**” means [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca);
- (b) “**City**” means the City of Surrey;
- (c) “**City Representative**” has the meaning set out in Section 2.3;
- (d) “**City Website**” means [www.surrey.ca](http://www.surrey.ca);
- (e) “**Date**” has the meaning set out in Section 2.2;
- (f) “**Evaluation Team**” means the team appointed by the City;
- (g) “**Preferred Respondent(s)**” means the Respondent(s) selected by the Evaluation Team;
- (h) “**Respondents**” (individually the “Respondent”) means an entity that submits a Submission in response to the RFEOI/SOQ issued by the City;
- (i) “**RFEOI/SOQ**” means this Request for Expressions of Interest and Statements of Qualifications;
- (j) “**Services**” has the meaning set out in Schedule A; and
- (k) “**Submission**” means a submission submitted in response to this RFEOI/SOQ.

## 2 INSTRUCTIONS TO RESPONDENTS

### 2.1 Address for Submission Delivery

The Respondent should submit the Submission **electronically** in a single pdf file which must be received by the City by email at: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

Confirmation of receipt of email will be issued. Submissions that cannot be opened or viewed may be rejected. A Respondent bears all risk that the City's receiving equipment functions properly so that the City receives the Submission.

**Note:** The maximum file size the City can receive is 10Mb. If sending large email attachments, Respondents should phone [604-590-7274] to confirm receipt.

### 2.2 Date

The City would prefer to receive Submissions on or before November 23<sup>rd</sup>, 2023 (the "Date").

### 2.3 Inquiries

All inquiries related to this RFEOI/SOQ should be directed in writing to the person named below (the "**City Representative**"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Sunny Kaila, Manager, Procurement Services

Email: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

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Inquiries should be made no later than seven (7) business days before the closing Date. The City reserves the right not to respond to inquiries made within seven (7) business days of the closing Date. Inquiries and responses will be recorded and may be distributed to all Respondents at the discretion of the City.

Respondents finding discrepancies or omissions in the RFEOI/SOQ documentation or having doubts as to the meaning or intent of any provision should immediately notify the City Representative. If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue an addendum in accordance with Section 2.4. No oral conversation will affect or modify the terms of this RFEOI/SOQ nor be relied upon by any Respondent.

### 2.4 Addenda

If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue a written addendum by posting it on the BC Bid Website at [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca) and the City Website at [www.surrey.ca](http://www.surrey.ca) (collectively, the "**Websites**"), and upon posting, any addenda will form part of this RFEOI/SOQ. It is the responsibility of Respondents to check the Websites for addenda. The only way this

RFEOI/SOQ may be added to, or amended in any way, is by a formal written addendum. No other communication, whether written or oral, from any person will affect or modify the terms of this RFEOI/SOQ or may be relied upon by any Respondent. By delivery of a Submission, the Respondent is deemed to have received, accepted and understood the entire RFEOI/SOQ, including any and all addenda.

## **2.5 Status Inquiries**

All inquiries related to the status of this RFEOI/SOQ, including whether or not a Respondent has been selected, should be directed to the City Website and not to the City Representative.

## **3 SUBMISSION FORM AND CONTENTS**

### **3.1 Form of Statements of Qualifications**

Respondents should include the information below in their Submission.

#### **A. LEAD FIRM PROFILE**

- Firm name & address of lead firm.
- List of relevant completed projects, including short project descriptions for the three most relevant projects, and an approximate total volume of related work for the last five years completed by the lead firm (organized by year, in Canadian dollars).
- List of similar or related projects currently underway.
- General overview of the lead firm's approach to related projects.

#### **B. PROPOSED PROJECT TEAM**

- List and short profile of possible team members (role, qualifications, related experience) and other possible firms. CVs are not required. Please note the RFP will provide more detail about the expertise that will be expected. At this stage, the City is interested in understanding more about lead firms and their proposed partners that may be drawn upon to deliver this type of project.
- References (project, client name and contact information only).
- List of related projects completed in past the 5 years completed by the proposed project team.

#### **C. CORPORATE SUSTAINABILITY**

- Overview of corporate commitment to sustainability.

#### **D. ADDITIONAL INFORMATION**

Respondents can provide other information that is not requested here but which you think the City of Surrey should consider in evaluating your firm/team.

### **3.2 Signature**

The Submission should be signed by a person authorized to sign on behalf of the Respondent and include the following:

- (a) If the Respondent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Submission should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Submission on behalf of the corporation is submitted;
- (b) If the Respondent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venturer should be included, and each partner or joint venturer should sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the City that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venturer is a corporation then such corporation should sign as indicated in subsection (a) above; or
- (c) If the Respondent is an individual, including a sole proprietorship, the name of the individual should be included.

## **4 EVALUATION AND SELECTION**

### **4.1 Evaluation Team**

The evaluation of Submissions will be undertaken on behalf of the City by the Evaluation Team. The Evaluation Team may consult with others including City staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required. The Evaluation Team will give a written recommendation for the selection of a Preferred Respondent or Preferred Respondents to the City. Such discussions will not in any way create a binding contract between the City and any such Respondents.

### **4.2 Evaluation Criteria**

The Evaluation Team will compare and evaluate all Submissions to determine the Respondent's strength and ability to provide the Services in order to determine the Submission which is most advantageous to the City using the following criteria:

- (a) Respondent's business and technical reputation and capabilities and experience of its personnel and project team;
- (b) Respondent's business experience and expertise with this type of project; and
- (c) Respondent's approach and ability to meet the City's objectives as described in the Scope of Services.

The Evaluation Team will not be limited to the criteria referred to above, and the Evaluation Team may consider other criteria that the team identifies as relevant during the evaluation

process. The Evaluation Team may apply the evaluation criteria on a comparative basis, evaluating the Submissions by comparing one Respondent's Submission to another Respondent's Submission. All criteria considered will be applied evenly and fairly to all Submissions.

#### **4.3 Evaluation Process**

To assist in evaluation of the Submissions, the Evaluation Team may, in its sole and absolute discretion, but is not required to:

- (a) conduct reference checks relevant to the project and background investigations of the Respondent, and any subcontractors proposed in the Submission, with internal and/or external sources, and consider and rely on any relevant information received from the references and from any background investigations in the evaluation of Submissions;
- (b) seek clarification or additional information from any, some, or all Respondents with respect to their Submission, and consider and rely on such supplementary information in the evaluation of Submissions;
- (c) request interviews/presentations with any, some, or all Respondents to clarify any questions or considerations based on the information included in Submissions, and consider and rely on any supplementary information received from interviews/presentations in the evaluation of Submissions; and
- (d) seek confirmation that the inclusion of any personal information about an individual in a Submission has been consented to by that individual.

The Evaluation Team is not obligated to complete a detailed evaluation of all Submission and may, after completing a preliminary review of all Submissions, identify and drop from any detailed evaluation any Respondent which, when compared to the other Respondent, the Evaluation Team judges, in its sole discretion, to not be in contention to be selected as the Preferred Respondent.

#### **4.4 Litigation**

In addition to any other provision of this RFEOI/SOQ, the City may, in its absolute discretion, reject a Submission if the Respondent, or any officer or director of the Respondent submitting the Submission, is or has been engaged directly or indirectly in a legal action against the City, its elected or appointed officers, representatives or employees in relation to any matter, or if the City has initiates legal action.

In determining whether or not to reject a Submission under this section, the City will consider whether the litigation is likely to affect the Respondent's ability to work with the City, its consultants and representatives and whether the City's experience with the Respondent indicates that there is a risk the City will incur increased staff and legal costs in the administration of an agreement if it is awarded to the Respondent.

## **5 GENERAL CONDITIONS**

### **5.1 No City Obligation**

This RFEOI/SOQ is simply an invitation for Submissions for the convenience of all parties. It is not a tender or a request for proposals and does not commit the City in any way to pre-qualify a Respondent(s), and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFEOI/SOQ process.

### **5.2 Respondent's Expenses**

Respondents are solely responsible for their own expenses in preparing, and submitting a Submission, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from this RFEOI/SOQ. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Submission, or participating in subsequent proposal requests, negotiations for an agreement, or other activity related to or arising out of this RFEOI/SOQ.

### **5.3 No Agreement**

By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Respondents expressly agree that no contract of any kind is formed under, or arises from, this RFEOI/SOQ, prior to the signing of a formal written agreement.

### **5.4 Conflict of Interest**

A Respondent shall disclose in its Submission any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

### **5.5 Solicitation of Council Members and City Staff**

Respondents and their agents will not contact any member of the City Council and City staff with respect to this RFEOI/SOQ, other than the City Representative, at any time prior to the award of an agreement or the cancellation of this RFEOI/SOQ, and which could be viewed as one Respondent attempting to seek an unfair advantage over other Respondents.

### **5.6 Confidentiality**

All Submissions become the property of the City and will not be returned to the Respondent. All Submissions will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

## **6 CITY DISCLAIMER**

- (a) The information in this RFEOI/SOQ and any further supporting documentation is provided for reference purposes only. It is the responsibility of interested parties



to confirm the accuracy and applicability of this information. All costs related to updating or acquiring additional information shall be born solely by the Respondent. The information contained in this RFEOI/SOQ has been prepared, in part, on information provided by others, and such information is believed to be accurate and reliable. However, by its receipt of this RFEOI/SOQ, each Respondent remises, releases, and forever discharges the City and its representatives (including staff and consultants and other professional advisors) from any and all claims which such person has, have, or may hereafter have arising out of any information contained herein. Any party who intends to submit a response to this RFEOI/SOQ is specifically invited to independently verify the accuracy of the information contained herein.

- (b) The City shall not be obligated to review or accept any Submission and may reject any or all Submissions without giving reasons therefore.
- (c) All negotiations and discussions with Respondents are on a “without prejudice” basis and cannot be construed as an agreement, and/or otherwise unless expressly approved by City Council and a written agreement is signed by the City.
- (d) The City may negotiate with any one or more of the Respondents without having any duty or obligation to advise or allow any other Respondents to vary their Submission or otherwise negotiate with the City.
- (e) The City may enter into discussions to clarify issues related to any Submission. If at any time the City reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached, the City may give notice terminating discussions, but is under no obligation to do so.
- (f) The City does not authorize any other person or agency to represent the Project on its behalf without the prior written approval of the City.
- (g) By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Respondents expressly agree that no contract of any kind is formed under, or arises from, this RFEOI/SOQ process.

## **7 DISCLAIMER**

Notwithstanding anything contained herein, the Respondent agrees that he shall take all necessary steps to confirm the accuracy of this RFEOI/SOQ and agrees that the City shall have no liability whatsoever in respect of any losses or damages of any kind howsoever arising in relation to this RFEOI/SOQ.

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## SCHEDULE A - SCOPE OF SERVICES

### 1. SCOPE OF SERVICES

The City of Surrey (the “City”) is seeking expressions of interest from experienced Respondents to lead a comprehensive transformation of our Corporate Intranet platform. A few of the key objectives of this initiative are as follows:

1. Implement a modern Intranet hub for enhanced user experience and employee engagement: We aim to create an environment that integrates features specifically designed to elevate user interaction and boost employee engagement metrics.
2. Implement AI-driven search and platform integration: We are seeking state-of-the-art search functionalities supported by artificial intelligence, seamlessly integrated with our existing Microsoft 365 environment and transform how our staff access information.
3. Advanced Analytics: The platform should have comprehensive analytics capabilities that assist in decision-making and reporting, so that we can refine and optimize our efforts for maximum impact.

The selected vendor is expected to present their qualifications, with a focus on these key opportunity areas. We also request a well-defined strategy and approach for achieving these objectives and seek examples of prior work that aligns with the scope of this endeavor.

### 2. PROJECT BACKGROUND

The City's existing Intranet solution, implemented in 2016, has served as a foundational tool for internal communication and collaboration within the organization. Over the years, it has proven to be an asset in facilitating information sharing, resource access, and interdepartmental collaboration. While the current Intranet system has been effective in many aspects, there are some identified limitations related to user experience, search capabilities, functionality, and security. These limitations occasionally pose challenges for employees when it comes to accessing information and resources efficiently.

To address these existing challenges and enhance overall operational efficiency, we are initiating a project to replace the current Intranet with a more advanced, secure, and user-centric platform. This project aims to build upon the strengths of our current system and address the areas that need improvement. Key components of this project include seamless integration with M365, leveraging M365 Co-pilot where feasible, utilizing Azure AD (Entra) for secure single sign-on access from any device, anywhere, anytime, and implementing API integration to improve functionality and connectivity. The goal is to ensure that the new Intranet continues to support and enhance the effective internal communication and collaboration that the current system has provided.

#### **Organizational Context**

The City is home to a dynamic workforce of approximately 5,000 staff, encompassing both office personnel and field staff. We are dedicated to creating a workplace where all our

staff feel deeply connected, valued, and engaged. We recognize that our staff are the heart of our organization, and their well-being and sense of belonging are paramount. The proposed intranet should be designed to cater to the diverse needs and roles of this broad spectrum of employees.

In 2019, a significant technological stride was taken with the introduction of Microsoft 365, including Microsoft Teams for real-time communication and SharePoint Online for efficient document management and collaboration. This step was part of the City's commitment to ensuring that its technological infrastructure remains modern and robust. We aim to further enrich our digital ecosystem by modernizing our Intranet, further enhancing the user-centric digital environment, and facilitating improved communication, collaboration, and engagement across the organization.

**3. ESTIMATED PROJECT TIMELINE**

<b>Activity</b>	<b>Estimated Date</b>
Closing Date	November 23, 2023
Respondent Demonstrations	November 27 – December 15, 2023
Clarification Interviews	December 18, 2023 – January 4 2024
Shortlisted Respondents invited to RFP	Early Q1, 2024

The above dates are subject to change at the sole discretion and written approval of the City.