



REQUEST FOR PROPOSAL

21-002

Capital Projects Plan Engagement and Strategy

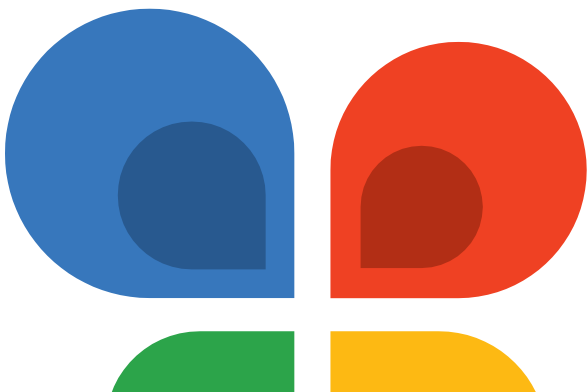
Date Issued: July 20, 2021

Due Date: 1:00 p.m. (local time), August 16, 2021

Contact Name: Iva Paulik

Email address:

ipaulik@gsacr.d.ab.ca



6 St. Vital Avenue St. Albert,
Alberta, Canada T8N 1K2

T: 780.459.7711
F: 780.458.3213

gsacr.d.ab.ca



Request for Proposals

RFP No. 21-002

Capital Projects Plan Engagement and Strategy

Issue Date: July 20, 2021

Closing date and time:

Proposals must be received on or before 1:00 p.m. Mountain Standard Time on August 16, 2021.

Please submit one electronic file.

Submission address:

All proposals must be submitted electronically* to ipaulik@gsacrd.ab.ca :

RFP Capital Projects Plan Engagement and Strategy

Attention: Iva Paulik, Secretary-Treasurer

Greater St. Albert Catholic Schools, 6 St. Vital Avenue, St. Albert, AB T8N 1K2

Contact person: All enquiries related to this Request for Proposal are to be directed, in writing, to the following person. Information obtained from any other source is not official and should not be relied upon:

Iva Paulik, Secretary-Treasurer

Email: ipaulik@gsacrd.ab.ca

**From time to time our spam filters block legitimate email. The Division cannot accept responsibility for delivery/receipt of email so please follow up if you do not receive a response.*



Capital Projects Engagement and Planning Strategy Mandate

Greater St. Albert Catholic Schools (GSACRD) intends to engage the services of professional consultants to assist our organization in executing an Engagement and Planning Strategy to establish and action key capital priorities that support a long term sustainable infrastructure plan that provides school choice, optimizes utilization and sustains enrolments in all communities where the division operates.

The Division is seeking to engage its community regarding possible strategies relative to capital planning in order to enhance the efficient utilization of schools and ensure that the Division is positioned to access designated school sites in order to facilitate the availability of Catholic education in new growth areas. GSACRD envisions two phases of engagement as follows:

1. An initial ideation phase in which data is shared with stakeholders and possible paths forward are developed into workable strategies.
2. A second phase in which possible scenarios or strategies are shared with the community in an effort to obtain feedback to inform the decision-making process of the Board.

The Consultant chosen will have worked extensively with other communities on strategic planning processes, public consultation, preparation of capital project plans and/or strategies, and has experience working with diverse sectors of the population. Engagement with the community and other stakeholders to help determine the strategic project priorities and suggest possible steps forward will ensure the process builds trust through collaboration and strong relationships with the community. Identifying stakeholders, their interests, providing information, encouraging collaboration, participation in the process and transparency are essential values for GSACRD.

An advisory committee may be utilized during the initial phase of the project. The role of the Committee will be to suggest recommendations to the Board of Trustees, ensure adherence to timelines and expectations, and provide feedback and advice to the Consultant during the project. Although the Consultant may work with an advisory committee as well as the Board of Trustees during the course of the project, the consultant shall report directly to the Superintendent.



Deliverables

The Consultant will:

- Provide overall project direction and framework at the beginning of the project;
- Work with Division representatives to identify potential stakeholder participants;
- Provide a detailed communications plan to inform the community and our division families and employees of this initiative and the engagement process;
- Develop benchmarks for success such as number and demographics of participants;
- Ensure adherence to objectives provided by committee and be available for guidance throughout the project;
- Be responsible for implementing, coordinating and advertising for this engagement process;
- Document all meetings, including planning sessions with the committee and provide summary reports;
- Provide a detailed plan as to how the Consultant will engage participants in a dynamic way, getting the participants excited about this initiative. The plan will be developed with appropriate and transparent community engagement that aligns with the International Association for Public Participation (IAP2) best practices.
- Provide detailed reporting identifying the strategic priorities, surfaced through stakeholder engagement processes that fulfill the mandate of this project.

The engagement process is intended to solicit the ideas and views of various stakeholders as to what the priorities for capital strategies might be. Through these stakeholder engagement sessions, the Consultant will make recommendations to the Superintendent, Board, and/or committee, as appropriate, regarding key priorities and themes to guide the future capital plan.



Proposal Bid Submission

Proposals will include:

- Identification of the roles as well as the commitment, qualifications and expertise of the project manager and all team members and their estimated time to be spent on the project.
- A list of similar work undertaken as well as the names and contact information for two recent projects;
- Consultant's understanding of the context, issues and ultimate objectives of the project;
- Proposed methodology;
- Proposed schedule of work. All work shall be completed by February 28, 2022, or according to a mutually agreed upon schedule, contingent upon feasibility.
- A cost breakdown for fees and disbursements.
 - Consultant will include the proposed fee structure and quote any additional charges that may be applicable and which have not already been addressed in the Proposal.
 - The fee will include GST as a separate line item.
 - A list of chargeable disbursements, including unit costs and an estimate of the total cost is also to be included.
 - Hourly and per diem rates for all staff must be provided. These rates will form the basis for agreed variations in services.
 - Consultant will clearly note any/all costs that are not included or allowed for and will also allow for the mandatory meetings and notifications required for the project;
 - Invoices, to be issued monthly, will be required for payment. Each invoice must be accompanied by a progress report. Each invoice must include a breakdown of staff, hours, rates, expenses and GST.
 - Proposals must be limited to no more than eight (8) pages (except for resumes, title page, and table of contents) and be submitted electronically.



Evaluation Criteria

The following criteria outlined below will be utilized in the evaluation of the Proposals.

Project Methodology– 20 points

Team Experience and Capacity– 20 points

Cost – 40 points

Proposed Project Schedule/Timeline – 10 points

Past Performance/References– 10 points

General Instructions

The following instructions, terms and conditions apply to all Proposals related to this RFP. Greater St. Albert Catholic Schools reserves rights to the following:

To accept any Proposal;

To reject any and/or all irregularities in the Proposal submitted;

To reject any and/or all Proposals;

To accept a Proposal that is not the lowest cost;

To cancel or reissue the RFP;

To clarify or seek further input if deemed necessary;

To negotiate further terms and conditions once the contract has been awarded.

Terms and Conditions

Any contract that may be entered into as a result of this Proposal will be subject to the laws of the Province of Alberta. It is the responsibility of the Consultant to thoroughly examine these documents and satisfy itself as to the full requirements of this RFP. While GSACRD has used



considerable effort to ensure an accurate representation of information in this RFP, the information supplied is a guideline for the Consultant.

The information is not guaranteed to be accurate, nor is it necessarily comprehensive or exhaustive. GSACRD will assume no responsibility for any oral information or suggestion(s). The Consultant is responsible for the costs of preparing proposals.

All documents, reports, proposal submissions, working papers or other materials submitted to GSACRD shall become the sole and exclusive property of the Division and as such, are subject to privacy legislation. To request documentation confidentiality, Consultant must submit a covering letter, with their proposal, detailing the specifics of their request.

GSACRD, as a result of awarding this contract and for the use of the Division's property or facilities requires that:

The Consultant shall indemnify and pay the Division promptly, on demand for any loss or damage to the Division's property and facilities arising either directly or indirectly as a result of the use of the property or facilities under the terms of this RFP.

All Proposals shall be irrevocable to remain open for acceptance for at least (60) sixty days after closing time, whether or not another Proposal has been accepted.

The Consultant selected to carry out the study will be required to enter into a contract with Greater St. Albert Catholic Schools respecting the conduct of the project.

Insurance

The Consultant shall, at their own expense, provide and maintain until the completion of the Project the following insurance in a form acceptable to the Division with an insurer licensed in Alberta including:

1. Commercial General Liability (CGL): covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than \$5,000,000 per occurrence \$5,000,000 General Aggregate.



2. **Automobile Liability:** Covering any auto , or if the Consultant has no owned autos, covering hired, and non-owned autos, with limit no less than \$2,000,000 per accident for bodily injury and property damage.

3. **Workers' Compensation:** as required by the Province of Alberta.

4. **Professional Liability (Errors and Omissions):** Insurance appropriate to the Consultant's profession, with limit no less than \$1,000,000 per occurrence or claim, \$1,000,000 aggregate.

Additional Insured Status

Greater St. Albert Catholic School Division, its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts or equipment furnished in connection with such work or operations.

Primary Coverage

For any claims related to this contract, the Consultant's insurance coverage shall be primary insurance coverage at least as broad respects the Divisions CGL policy, covering the Division's officials, employees, and volunteers. Any insurance or self-insurance maintained by Greater St. Albert Catholic School Division, its officers, officials, employees, or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

Notice of Cancellation

Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to Greater St. Albert Catholic School Division with a notice of Cancellation of Thirty (30) days prior to cancellation by the Consultant's Insurers to Greater St. Albert School Catholic School Division.

Waiver of Subrogation

Consultant hereby grants to the Division a waiver of any right to subrogation which any insurer of said Consultant may acquire against Greater St. Albert Catholic School Division by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the Division has received a waiver of subrogation endorsement from the insurer.



Self-Insured Retentions

Self-insured retentions must be declared to and approved by Greater St. Albert Catholic School Division. Greater St. Albert Catholic School Division may require the Consultant to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: unless otherwise acceptable to Greater St. Albert Catholic School Division.

Claims Made Policies

If any of the required policies provide claims-made coverage:

1. The Retroactive Date must be shown, and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of work.

Verification of Coverage

Consultant shall furnish Greater St. Albert Catholic School Division with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the Greater St. Albert Catholic School Division before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. Greater St. Albert Catholic School Division reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.