



**ST. CLAIR CATHOLIC**  
DISTRICT SCHOOL BOARD

*Lighting the Way ~ Rejoicing in Our Journey*

**REQUEST FOR PROPOSALS  
FOR  
COST CONSULTANT for  
SARNIA SECONDARY SCHOOLS  
CONSOLIDATION PROJECT**

**RFP (Cost Consultant) No.: 715-CP1301  
ISSUE DATE: APRIL 23, 2012**

**DUE DATE: May 8, 2012 at 4:30:00 p.m., Local Time**

**Mailing Address:**

Mr. Tony Prizio  
Purchasing Department  
St. Clair Catholic District School Board  
420 Creek Street  
Wallaceburg, ON  
N8A 4C4

## **Part 1: INTRODUCTION**

### **1.1 Architectural Services**

The St. Clair Catholic District School Board is seeking a Cost Consulting firm to provide all of the necessary materials, equipment and labour to provide cost estimating and design review services outlined in the attached RFP document.

The RFP contains the following sections and appendices:

Part 1:	Introduction
Part 2:	RFP Process and Submission Instructions
Part 3:	Criteria for Evaluation and Awarding RFP
Part 4:	Scope
Part 5:	Required Written Submission
Appendix A:	Agreement to Contract
Appendix B:	Stipulated Sum Price Schedule
Appendix C:	Project Schedule

### **1.2 Project Overview**

The objective of this Request for Proposal (“RFP”) is to select a cost consultant to provide the Scope of Services described herein in accordance with the terms and conditions outlined in this RFP. The successful Proponent (“Cost Consultant”) shall provide cost consulting services for the Project described herein.

The St. Clair Catholic District School Board (“Board”) is proposing a renovation to its St. Christopher Catholic Secondary School (located at 1001 The Rapids Parkway, Sarnia, Ontario) together with an expansion onto its existing land. It is anticipated that the Project will be considered as two distinct elements, both being developed concurrently with a combined budget estimate of \$ 12M. Construction is expected to start by February 2013, and substantial completion is to occur by July 31<sup>st</sup>, 2014.

### **1.3 Background**

The Board currently has 26 elementary schools, 3 secondary schools and an administrative office with 2 maintenance warehouses.

The Board proudly serves over 8,500 students within the County of Lambton and the Municipality of Chatham Kent.

In 1998, the St. Clair Catholic District School Board was created through the amalgamation of the former Kent County Roman Catholic Separate School Board and the former Lambton County Roman Catholic Separate School Board.

#### **1.4 Definitions**

“Closing Time”, means the Proposal submission date and time as set out on the cover page of this RFP.

“Days”, means calendar days.

“Proponent”, means an entity that submits a proposal in response to this RFP and, in respect of the period prior to the RFP Closing Time, as the context may suggest, refers to a potential Proponent.

“Cost Consultant”, means any person, firm or organization, that has been awarded the contract to perform work as outlined within this RFP.

“Selection Committee”, may be comprised of the Associate Director of Corporate Services & Treasurer, Superintendent of Education, the Board’s project leader and staff from the Board’s Facility Services department. The Board reserves the right to change the members of the Selection Committee as it requires.

“User Committee”, may be comprised of the Director of Education, Associate Director of Corporate Services & Treasurer, Superintendent of Education, one or more principals and department heads, the Board’s project leader and staff from the Board’s Facility Services department. The Board reserves the right to change the members of the User Committee as it requires.

“Board Project Leader”, shall have the same meaning as Project Manager.

## Part 2: RFP PROCESS AND SUBMISSION INSTRUCTIONS

### 2.1 RFP Schedule

For the purposes of this RFP, the Board has established the following timing deadlines for the completion of the RFP Process.

Schedule	Date & Time
1. RFP Issue	April 23, 2012
2. Last day to submit questions and request clarification (Question Close)	May 3, 2012, 2:00 p.m. ET
3. Closing Date and Time	May 8, 2012, 4:30 p.m. ET
4. Interview	May 10, 2012 (if required)

### 2.2 Procurement Contact Name

Tony Prizio, Procurement Specialist  
St. Clair Catholic District School Board  
420 Creek Street  
Wallaceburg, ON  
N8A 4C4  
Tel: 519.627.6762 Ext. 256  
Email: [tony.prizio@st-clair.net](mailto:tony.prizio@st-clair.net)

### 2.3 Acceptance of Terms

The submission of a proposal by each Proponent represents that the Proponent has read and completely understands, and accepts all provisions contained in this RFP. Any proposal that has alternative terms and conditions to those contained herewith may be considered a counter offer to the Boards' request and may be rejected.

### 2.4 Submission of Proposals

One original and 2 copies of the written submission must be received in a sealed envelope/package by the closing date and time as stated in the RFP document, and should have the following marked on the outside of the envelope:

- **Written Submissions**
- Proposal title and number
- Proponent's name and address

The Fee Schedule (one original, no additional copies) shall be submitted in a separate sealed envelope and should clearly have the following marked on the outside of the envelope:

- **Fee Schedule**
- Proposal title and number
- Proponent's name and address

Submissions should be addressed to: **Tony Prizio, Procurement Specialist**  
St. Clair Catholic District School Board  
420 Creek Street  
Wallaceburg, ON N8A 4C4

Submissions not so clearly marked may be disqualified.

Since submissions must be in a sealed envelope/package, submissions by fax or electronic delivery are not acceptable.

## **2.5 Withdrawal of Proposals**

A Proponent may alter, amend or withdraw a submitted proposal if such request is received in writing by the contact person for this RFP prior to the closing date and time specified on the cover of this document. Such requests received after the closing date and time will not be permitted.

## **2.6 Signing of Proposals**

The Proponent shall sign the Agreement to Contract (Appendix A) as contained herein. The Proponent undertakes and acknowledges, if this proposal is accepted, to supply the goods and/or services to the Board at the prices proposed and in accordance with the conditions and specifications stated herein and further consents to the disclosure of the successful proposal, indicating the name of the successful Proponent, the products selected and the unit prices proposed.

## **2.7 Late Submissions**

Any proposal received after the closing time specified in this RFP shall not be accepted for consideration and will be sent back to the Proponent unopened, with a letter stating the reason for the return.

## **2.8 Proposal Rejection**

The lowest cost may not necessarily be accepted. The Board reserves the right to decline any or all proposals, in whole or in part, at any time prior to making an award.

## **2.9 Proposal Acceptance**

All proposals shall be irrevocable for sixty calendar days following the deadline for submission to allow sufficient time for evaluation of the proposals. The acceptance of a proposal will be by notice in writing signed by the Board.

## **2.10 Proposal Opening**

There will be no public opening of submissions for this RFP.

## **2.11 Cancellation**

The Board may withdraw this RFP at its discretion at any time prior to an award.

## **2.12 Acceptance of Proposals**

The Board shall, at its sole discretion, be the only determiner of the acceptability and suitability of services offered for the purpose for which such services are required.

## **2.13 Clarification**

The Board reserves the right to seek clarification from any Proponent without being obligated to all Proponents if it finds certain aspects of a proposal unclear.

## **2.14 Conflict of Interest**

Each Proponent shall declare to the Board, as part of their proposal, any situation that may be either a conflict of interest, or a potential or perceived conflict of interest with the contractual obligations of their proposal.

No member of the Board and no officer or staff member of the Board are, will be, or shall become interested, directly or indirectly, as a contracting party, partner, stockholder, surety or otherwise in the performance of any contract resulting from this solicitation or in the supplies, work or business in connection with any such contract or in any portion thereof, or in any monies to be derived there from.

## **2.15 Inquiries**

Under no circumstances will meetings related to this RFP be held with individual Proponents and employees of the Board prior to the closing date and time of this Request for Proposal. Non-compliance with this condition may (for this reason alone) result in disqualification of the Proponent's submission.

It is the responsibility of the Proponent to seek clarification on any matter that they consider unclear before submitting a proposal. The Board is not responsible for any misunderstanding of the RFP on the part of a Proponent. Written queries should be directed to: Tony Prizio at [tony.prizio@st-clair.net](mailto:tony.prizio@st-clair.net) and copied to Patsy McKenzie at [patsy.mckenzie@st-clair.net](mailto:patsy.mckenzie@st-clair.net). Send queries only to this email address.

No employee or agent of the Board is authorized to amend or waive the requirements of the RFP document in any way unless the amendment or waiver is signed by the Board's purchasing designate (Tony Prizio). Under no circumstances shall the Proponent rely upon any information or instructions from the Board, its employees, or its agents unless the information or instructions are provided in writing in the form of addendum issued by the purchasing designate. Neither the Board, nor its employees, nor its agents shall be responsible for any information or instructions given to the proponent, with the exception of information or instructions provided in writing by the purchasing designate.

## **2.16 Proponent Expenses**

Any and all costs and expenses incurred by Proponents in the development, preparation, submission or presentation of their Proposals, or otherwise related to its participation in this RFP process will be borne by the Proponents. The selection of any Proposal, or the rejection of any or all Proposals, or the termination of this RFP process, or initiation of a new RFP process shall not render the Board liable to pay or reimburse any such costs or damages incurred by any Proponent or any partner or contractor of such Proponents.

### **2.17 Addenda**

During the period prior to the Closing Date, alterations or amendments may be issued as written addenda. Information or instructions provided to a Proponent that may, in the opinion of the Board, be of general interest, and any other information or instructions that the Board may deem to be appropriate in the circumstances, may be incorporated in an addendum to the RFP which will be distributed to all eligible proponents through the Board's website and Biddingo. Any addendum issues as aforesaid by the Board will automatically become, upon its issuance, an integral part of the RFP, provided that it is issued by the Board and sent to eligible Proponents.

In response to an addendum issued, a Proponent may amend or withdraw its Proposal prior to the Closing Date and Time. Where no amendment or notice of withdrawal is received by the Board, the Proponent will be deemed to have agreed to the terms of any such addendum and rely on their Proposals as delivered to the Board.

### **2.18 Changes to Proposals**

No Proposal can be modified after the Closing Date. However, Proposals may be changed or withdrawn before the Closing Date by way of an addendum or notice, given by the Proponent, which must be received by the Board in writing before the Closing Date and Time.

### **2.19 Incomplete Submissions**

The Board may disqualify any Proposal that is submitted by non-eligible proponents, or that is incomplete, or is otherwise not submitted in accordance with the terms, conditions, and provisions of this RFP. Without prejudice to this right, the Board may request clarification where any Proponent's intent is unclear, and the Board expressly reserves the right to waive any irregularity or request amendment where, in the opinion of the Board, there is an irregularity or omission in the information.

### **2.20 Eligible Submissions**

Only Proponents who have received the RFP directly from the Board's website or "Biddingo" electronic tendering system are eligible to submit a Proposal under the RFP.

### **2.21 Errors and Omissions**

The Board will not be held liable for any errors or omissions in any part of the RFP. While the Board has used considerable effort to ensure an accurate representation in the RFP, the information contained in the RFP is supplied solely as a guideline for the Proponents. The information is not guaranteed or warranted to be accurate by the Board, nor is it necessarily comprehensive or exhaustive.

### **2.22 Right to Waive Minor Non-Compliance**

The Board reserves the right, in its sole and unfettered discretion, to reject or waive minor errors and non-compliance contained in a proposal without having to disqualify the proponent. The Board defines minor errors and matters of non-compliance as those which do not have the effect of creating an advantage of one submission over another but may be merely a matter of form.

### **2.23 Municipal Freedom of Information and Protection of Privacy Act**

The proposal and any accompanying documentation submitted by the Proponent prior to the closing date specified in this document shall become the property of the Board and shall not be returned. The proposal shall be subject to the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, M-56. The Proponent must identify any information contained in the proposal that is submitted in confidence.

### **2.24 Fair Wages and Hours**

All persons in the employment of the successful proponent, or other person doing or contracting to do the whole or any part of the work contemplated by the contract, should be paid in accordance with the "Fair Wage Schedule" as established by The Employment Standards Branch of the Ministry of Labour and any regulations under such Act that relates to wages, hours of work or other labour conditions, unless otherwise noted.

### **2.25 Form of Contract**

The Scope of Services and the terms and conditions associated with performing the Scope of Services and the terms and conditions associated with performing the Scope of Services as embodied in this RFP shall form part of the Contract between the Board and the successful Proponent. In the RFP Submission, Proponents shall identify any part(s) of the proposed Contract Form to which the Proponent objects. The Successful Proponent will be required to enter into a "Contract" for this RFP within thirty (30) days of selection for the provision of these services. If the selected proponent fails to execute the Contract within thirty (30) days after being selected, the Board, in its sole and absolute discretion and without incurring any liability, rescinds the selection of that proponent.

### **2.26 Workplace Safety and Insurance**

Proponent must furnish a copy of Workplace Safety and Insurance Board Clearance Certificate of good standing, "Section 748" of the Workplace Safety and Insurance Act.

### **2.27 Insurance**

Proponent must maintain, at the Proponent's expense for the entire term of the Contract or as otherwise required, all insurance as set out below:

- The successful proponent(s) shall provide the Board with proof of insurance for Comprehensive General Liability and Property Damage with a limit of not less than \$2,000,000.00 (two million dollars) inclusive prior to commencing work.
- The Proponent agrees to indemnify, hold harmless, and defend the Board from and against any and all liability for loss, damage and expense, which the Board may suffer or for which the Board may be held liable by reason of injury (including death) or damage to any property arising out of negligence on the party of the proponent or any of its representatives or employees by way of the ownership or operation of an automobile.
- The successful proponent(s) shall provide the Board with a complete certified copy of all policies.
- The successful proponent must name the St. Clair Catholic District School Board as additional insured on their insurance policies.



## **2.28 Safe School Procedures**

Proponent's staff are required to report to the main office of St. Christopher High School during regular school hours and notify the school office staff of the purpose of the visit. The Proponent is required to adhere to all school specific procedures if applicable.

It is the responsibility of the proponent's staff to sign in and sign out of the Log Book, which is located in the main office area, while performing their duties.

The following information must be recorded in a legible manner:

- Date
- Company Name
- Employee Name
- Employee Signature
- Reason for Visit
- Time Entering Building
- Time Leaving Building

## **2.29 No Smoking Policy**

All Proponents are advised that there is no smoking permitted within the school or on Board property, and this must be strictly adhered to by all parties. The successful Proponent shall be responsible for advising its' employees, or any other person doing or contracting to do the whole or any part of the work contemplated by the contract, of the foregoing.

## **2.30 Health and Safety**

The Occupational Health and Safety Act describes the responsibilities of an employer. The Board requires proponents to maintain procedures, training, and enforcement so that the responsibilities are carried out in the workplace. The proponent shall abide by and strictly adhere to the regulations and conditions set out and laid down by the most current versions of the Occupational Health and Safety Act. All staff employed or hired by the Proponent and working on the Board's premise MUST be trained in WHMIS in accordance with Occupational Health and Safety Act and Regulations. They MUST adhere to all of the Board's Health and Safety Procedures and Guidelines, and to Municipal By-Laws.

Proponents will submit proof of its health and safety program, procedures and training as detailed above upon request by the Board.

The successful proponent shall conform to the Ontario "Occupational Health and Safety Act" and all regulations made under said act and assume full responsibility for contraventions of same.

All workplace injuries or accidents on Board property MUST be reported by the contractor to the Board's representative within 24 hours.

Any workplace injury that is defined under the Occupational Health and Safety Act as a "Critical Injury" must be reported to the Board's representative IMMEDIATELY.

### **2.31 Confidential Information**

All material, data, information, or any item in any form supplied by the Board or derived from any data acquired by the Proponent from the Board both before and after the issuance of the RFP in connection with this RFP (“Confidential Information”) is proprietary to the Board, and;

- is the property of the Board and must be treated as confidential;
- is not to be used for any purpose whatsoever other than replying to this RFP and the fulfillment of any subsequent agreement;
- must not be disclosed to any third party without written authorization from the Board.

### **2.32 Entitlement to a De-Briefing**

In accordance with the Broader Public Sector Procurement Directive, unsuccessful proponents are entitled to a debriefing during which they will be provided with feedback regarding their submission. In order to be debriefed, unsuccessful proponents must contact the Procurement Specialist or his designate to request a debriefing within 60 days from the date of notification of award.

### **2.33 Bid Protest Procedure**

In the event that a Proponent wishes to review the decision of the SCCDSB in respect of any material aspect of the RFP process, and subject to having attended a debriefing, the Bidder shall submit a protest in writing to the SCCDSB within 10 days from such a debriefing.

Any protest in writing that is not timely received will not be considered and the Proponent will be notified in writing.

A protest in writing shall include the following:

- A specific identification of the provision and/or procurement procedure that is alleged to have been breached;
- A specific description of each act alleged to have breached the procurement process;
- A precise statement of the relevant facts;
- An identification of the issues to be resolved;
- The Proponents’ arguments and supporting documentation; and The Proponents’ requested remedy.

### Part 3: CRITERIA FOR EVALUATION AND AWARDED RFP

#### 3.1 Introduction

The RFP evaluation team will be chaired by the Procurement Specialist.

Proposals will be evaluated by a Selection Committee (“SC”) consisting of appropriate Board representatives, based on information provided by the proponents at the time of submission of their proposal.

It must be understood and accepted by any proponent submitting a proposal that all decisions as to the degree to which a proposal meets the requirements of this RFP are solely within the judgment of the RFP SC evaluation team.

The proponent must comply with all requirements specified in the RFP.

#### 3.2 Stages of Proposal Evaluation

The evaluation of proposals will be conducted by the SC in the following two (2) stages:

**Stage One:** will consist of scoring each proposal by the SC on the basis of the Written Proposal Requirements.

**Stage Two:** The Board will open and evaluate the Fee Schedule envelope for the Proponents. The Proponent with the lowest overall cost will receive 100/100 for their cost proposal and the other proponents will receive the pro-rated difference. The overall score for the two stages as determined by the RFP evaluation team will identify the overall ranking of the proponents to the Board.

#### 3.3 Written Proposal Requirements

This section provides general guidance for preparing proposals as well as specific instruction on the format and content of the proposal. The proponent’s proposal must include all data and information requested and must be submitted in accordance with these instructions. The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal should not simply rephrase or restate the Board’s requirements, but rather shall provide convincing rationale to address how the proponent intends to meet these requirements. The proposal evaluations will be based solely on the information presented in the proposal.

The written proposal requirements can be found in Part 5: Required Written Submission. The response to each section shall be rated and then the rating multiplied by the weight for the section to determine the score for that section.

The submission for each section must be limited to the maximum number of pages specified. Any exceptions to this rule will be identified in the appropriate section.

Submission should be in a bound format that ensures no pages can be removed or misplaced.

### 3.4 Rating Criteria

Each section of the response will be scored on a scale of 0 - 10 as follows:

- 0 non-responsive
- 1 - 2 poor
- 3 - 5 below expectations
- 6 - 7 meets expectations
- 8 - 9 above expectations
- 10 greatly exceeds expectations

Each section scored 0 -10 will have its score multiplied against the section weight for total points awarded for that qualification section. Responses will be evaluated on the following criteria:

Evaluation Criteria Schedule	Section Weight	Points Available
<b>Qualifications</b>		
1. Qualifications of Company	1	10
2. Approach to the Assignment	1	10
3. Approach to Cost Control	1	10
5. Appropriateness of Key Team Members	2	20
<b>Total</b>		<b>50</b>

### 3.5 Stipulated Sum Evaluation

Proponents must complete the stipulated sum pricing schedule (Appendix B) and submit in a separate sealed envelope. See Section 2.5 - Submission of Proposals for envelope labeling requirements.

Cost Consultant Services shall be an all-inclusive price exclusive of applicable taxes and must include all fees, disbursements, all other out of pocket expenses and include the services as detailed in the scope of services.

Services rendered, will be invoiced monthly as the project progresses.

Fees for changes to work for Services shall be as agreed prior to the commencement of services for the change. If a specified fee for a change is not agreed prior to the performance of the services in respect of the change, the fee shall be at the hourly rates submitted.

Harmonized Sales Tax (H.S.T.) is extra.

The total stipulated sum shall include royalties, custom duties, overhead and profit, insurance premiums, freight, fuel surcharges, mileage, expenses and all other charges at the date of this RFP, and not subject to revisions due to changes in cost of labour, materials or other items. No allowance shall be made subsequently in this connection on behalf of the proponent for any error or negligence on their part.

**3.6 Stipulated Sum Scoring Formula**

Fees will be scored on a relative pricing formula on the basis of the information provided in the pricing schedule found in Appendix B.

Each Proponent will receive a percentage of the total possible points allocated to fee for the service by dividing that Proponent's cost submitted for the service by the lowest cost for the service amount. For example, if the lowest cost offered by one Proponent is \$ 50,000, that proponent will receive 100% of the possible points. A proponent price of \$ 60,000 will receive 83.3% of the possible points ( $50,000/60,000=83.3\%$ ) and a Proponent who submits \$ 75,000 will receive 66.7% of the possible points ( $50,000/75,000=66.7\%$ ).

**3.7 Evaluation Criteria**

Proposals will be evaluated on the following:

<b>STAGE ONE - WRITTEN SUBMISSION</b>	<b>50%</b>
<b>STAGE TWO - PRICE</b>	<b>50%</b>

In the case of a tie score, the Board will flip a coin in the presence of an unbiased third party and the winner of the coin toss will be selected.

**3.8 Interview**

At the Board's discretion, the Board may request a Proponent to make a demonstration or oral presentation of its Proposal to the Board. The Proponent shall be contacted by the Board Procurement Specialist should a presentation be necessary.

**3.9 Award**

Proponents will receive a final score based on their written submission, and pricing schedule.

Upon award, the successful proponent and the Board shall negotiate a final contract in accordance with the terms and conditions set forth herein and set out in the proponent's submission.

## **Part 4: SCOPE**

### **4.1 Objective**

The Board is seeking the services of an experienced cost consultant firm to provide cost consulting services on a completed schematic design, and after the architect has completed 80 percent of the construction tender documents for the expansion and renovation of a Secondary school located in Sarnia, Ontario which has a construction budget of approximately \$12 million dollars.

### **4.2 Scope of Work**

The Board is planning to expand and renovate an existing multi-storey secondary school as described below.

The expansion and renovation of St. Christopher Catholic Secondary School in Sarnia will facilitate the closure of St. Patrick's Catholic High School located at 281 East Street North. This project has received a total allocation from the Ministry of Education for 462 pupil places in the amount of \$ 12,012,163.00. The Board currently owns the property for the intended school expansion that is located at 1001 The Rapids Parkway, Sarnia just north of the 402 and west of Modeland Rd.

The Ministry's allocations as noted above will be required to cover all costs associated with building a new school addition and renovation of existing school including but not limited to architectural fees, construction, all permits and fees, site preparation, geotechnical investigations, any special studies, furniture and equipment.

The Board anticipates opening the school in July 2014.

### **4.3 Scope of Services**

The role of the cost consultant is to review the design, provide objective costing analysis and advice, and report to the Board on options to ensure that the proposed capital expenditure is within the approved project budget. It is anticipated that the Cost Consultant shall provide the following scope of services which shall include, but not be limited to:

#### **1. Schematic Design**

1. Prepare Order of Magnitude estimate for the schematic design.
2. Prepare an estimate to support the schematic design being proposed.
3. Propose alternative design and material approaches to ensure design meets budget.
4. Provide cost consultant services for all value engineering items being proposed.
5. Present the schematic design budget to the Board, Architect and User Committee.

#### **2. 80% of Construction Tender Documents**

1. Review construction tender documents for appropriateness.
2. Prepare pre-tender estimates in consultation with the Board and Architect.
3. Propose alternative design and material approaches to ensure design meets budget.
4. Present the pre-tender estimate to the Board, Architect and User Committee.
5. Provide a letter confirming the project estimate is within the total project budget.

#### **4.4 Performance Expectations**

The Cost Consultant shall competently deliver the Scope of Services in a professional and efficient manner. Timely delivery of the services and submission of deliverables are mandatory.

The Cost Consultant must demonstrate a diligence to act on behalf of and in the best interests of the Board at all times. The Board may at its own discretion, terminate the contract with a Proponent due to non-performance.

#### **4.5 Substitutions**

The Cost Consultant shall not remove or change its proposed key team members, once committed to the Project, unless approved by the Board. Substitutions to the proposed key team members may be considered if the individual voluntarily resigns from the Cost Consultant's firm, is terminated by the Cost Consultant's firm, is absent due to illness or vacation, or at the Board's discretion. The Cost Consultant must prove in a manner satisfactory to the Board that substitute key team members are of equal or greater qualifications than the proposed individual. Substitute key team members shall be approved by the Board subject to submission of detailed qualifications as outlined herein. The Board shall receive seven (7) business days written notice from the Cost Consultant prior to substituting an individual, if a change is necessitated by the Cost Consultant. If the Board requests a change to any key team member, the Board shall provide seven (7) business days notice to the Cost Consultant to offer an acceptable substitute.

The Board reserves the right to terminate the contract or to request the replacement of any assigned individual on the Project at any time at its discretion.

## **Part 5: REQUIRED WRITTEN SUBMISSION**

### **5.1 Section 1 – Qualifications of Company**

The Board requires a qualified Cost Consulting firm with a team of competent specialists who have proven experience in building design and construction. The company shall demonstrate its relevant qualifications, capabilities, experience and value-added services performed for other school Boards within the last 5 years.

Proponents shall identify the number of years in business, general qualifications, and detailed qualifications as it pertains to the Project at hand, building design and construction project experience.

### **5.2 Section 2 – Approach to the Assignment**

The approach and methodology applied to undertaking the Project will be critical to achieving substantial completion on schedule. The Board requires the Proponent to fully understand the project requirements, Scope of Services and deliverables. The Cost Consultant shall manage its Scope of Services in order to deliver the Project on time and on budget recognizing the importance of quality assurance.

Proponents shall provide an outline of the proposed approach and methodology they will employ to successfully complete this assignment and to provide all Scope of Services as described in this RFP including quality assurance, quality control procedures, reporting formats and deliverables.

### **5.3 Section 3 – Approach to Cost Control**

The Cost Consultant will be expected to work closely with the Architect and the Board to keep the team fully informed of the status of the design development costs at all times, and to assist in clarifying the design intent and/or product or material specifications.

Proponents shall provide an outline of its proposed method to monitor costs associated with schematic design and construction document review phases. Proponents shall describe how they will interact with the Architect to keep the Board informed of all issues impacting cost and overall budget.

### **5.4 Section 4 – Appropriateness of Key Team Members**

Proponents shall identify the key team members to be assigned to the Project team and shall describe the individuals' capabilities, respective roles, responsibilities and availability for the Project. Proponents shall highlight the individuals' past relevant experience to be applied to the Project. Resumes shall be included in the Proposal.

Proponents shall provide an outline of the proposed time commitment for key individual team members in the following areas: schematic design and bid documents.

### **5.5 Proposal Format**

Proposals must include all data and information requested, and must be submitted in accordance with these instructions. The proposal should be clear, concise, and should include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal should not simply rephrase or restate the Board's requirements, but rather shall provide convincing rationale to address how the Proponent intends to meet these requirements. Proponents shall assume that the Board has no prior



knowledge of their experience, and the proposal evaluation will be based solely on the information presented in the proposal.

The proposal shall include the Agreement to Contract and be divided into four sections as described below. Page limits for each section are summarized in the following table:

<b>Section</b>	<b>Title</b>	<b>Page Limit</b>
	Agreement to Contract	1
1	Qualifications of Company	1
2	Approach to the Assignment	1
3	Approach to Cost Control	1
4	Appropriateness of Key Team Members	2 + resumés

\* Resumés, and charts are not to be included in page counts

The content of each section shall address the subjects in the order and format detailed through 5.1 – 5.4.

Proposals will be evaluated up to the page limits listed in the format instructions. Material exceeding the specified page limits will not be evaluated. Excess material will be removed from the section to which the page limit applies.

## **5.6 Page Format**

Pages shall be single spaced. Page size shall be 8.5 x 11 inches. All margins shall be no less than 1 inch. The glossary of abbreviations, title pages, table of contents, and tabbed dividers are not included in page limitations, and therefore should not include proposal material.

All copies of the proposal shall be printed single sided.

## **5.7 Binding and Labelling**

Sections 1 - 4 of the proposal submission should be bound together in one package. Each package should have the RFP number, the Proponent's identity, and copy number printed on the cover. Pages should be numbered sequentially by section, identifying the RFP number, section number, page number, and date of submission in the upper right hand corner of the page. Tabbed dividers should separate each section.

## **5.8 Proprietary Content**

Information which the Proponent considers to be of a proprietary or confidential nature must be clearly marked "PROPRIETARY".

**APPENDIX A – AGREEMENT TO CONTRACT**

**To:** St. Clair Catholic District School Board

I/We, the undersigned, acknowledge that I/we have read the terms of the St. Clair Catholic District School Board's Request for Proposal # 715-CP1301 Cost Consultant Services for Sarnia Secondary Schools Consolidation, signify our compliance as completed below, and submit the attached response in accordance with the stated conditions.

It is understood that the lowest or any proposal fee will not necessarily be accepted and that St. Clair Catholic District School Board reserves the right to reject or accept any proposal which the Board deems to be in its best interest.

**Legal Company Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_  
*"I have the authority to bind"*

**Printed Name:** \_\_\_\_\_

**Position/Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Once a proposal has been accepted, Proponents will be bound by these conditions.**

**APPENDIX B – STIPULATED SUM PRICE SCHEDULE**

We, the undersigned, declare that:

1. We have the authority to bind the Proponent indicated above to the specific terms and conditions imposed in the Request of Proposal (RFP) and offered in the Proponent’s Proposal and that, by my signature on this document, the Proponent specifically agrees to all waivers, restrictions, terms and conditions and requirements of the RFP.
  
2. We have carefully examined the RFP #: 715-CP1301 and the addenda numbered \_\_\_\_\_ to \_\_\_\_\_, and having understood all conditions affecting the Project, and if notified by the Board’s Procurement Specialist in writing of the award of the Contract, shall perform the Scope of Services in accordance with the Contract Form and terms therein, and the terms of the said Request of Proposal and our RFP Submission for the stipulated sum price as set out below:

\$	(	dollars)
(HST extra)		

3. The following unit rates in Canadian funds less HST will apply in determining the rate for additional services performed by the Cost Consultant:

Position Title	Hourly	Weekly
Principal		
Project Lead		
Quantity Surveyor		
Mechanical Quantity Surveyor		
Electrical Quantity Surveyor		
Admin. Support		
Other		

4. If awarded the contract, the key team members identified in our proposal shall be available immediately to commence the Scope of Services and shall be dedicated resources to the Project as identified in our Proposal.
  
5. We propose to use the following Sub-Contractors for the specified disciplines and have noted hereunder the name(s) of the firm with whom we propose to engage. We have indicated “own forces” where we, the undersigned, shall perform the discipline of work.

Discipline	Name of Firm	Address, Phone #, Contact Name
Architectural		
Structural		
Mechanical		
Electrical		

6. No person, firm, or corporation other than the undersigned has any interest in this RFP Submission or in the proposed Contract for which this RFP Submission is made. The undersigned also declares that the RFP Submission has been submitted without consultation, communication, agreement and/or arrangement with any competitor. A competitor is defined as any individual or organization, other than the Proponent, who has been requested to submit a Proposal or who could potentially submit a Proposal in response to this RFP, based on their qualifications and experience.
7. We have not made any knowingly false statements in our Proposal.

**Signatures:**

SIGNED AND SUBMITTED for and on behalf of:

\_\_\_\_\_  
*Name of Proponent*

**Witness:**

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Print name and title of person signing*

\_\_\_\_\_  
*Print name and title of person signing*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*

If Proponent is a corporation, affix corporate seal.

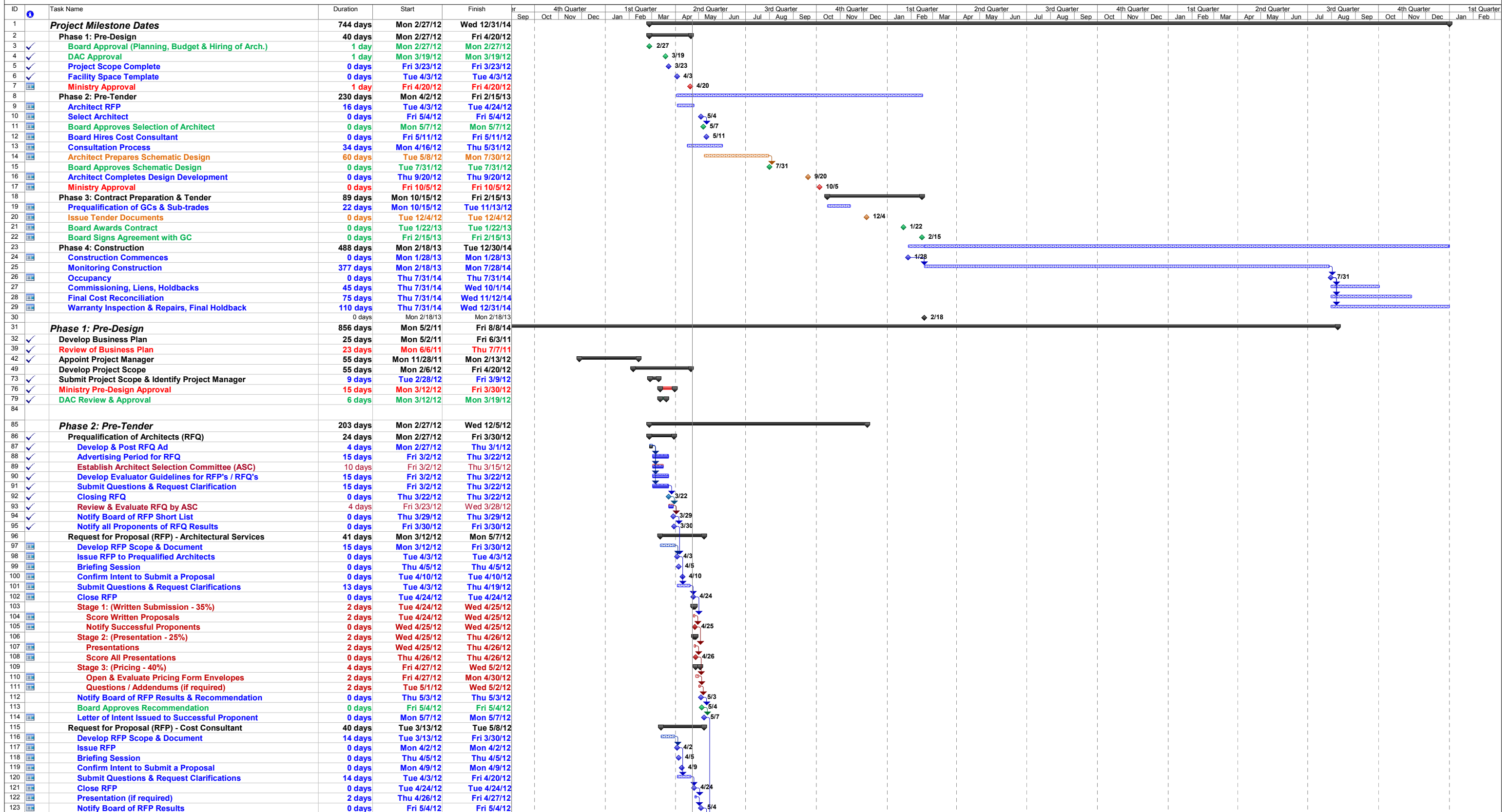
### APPENDIX C – PROJECT SCHEDULE

A preliminary schedule (attached) has been developed to outline the four phases of construction and is enclosed to identify key project milestones and completion dates.

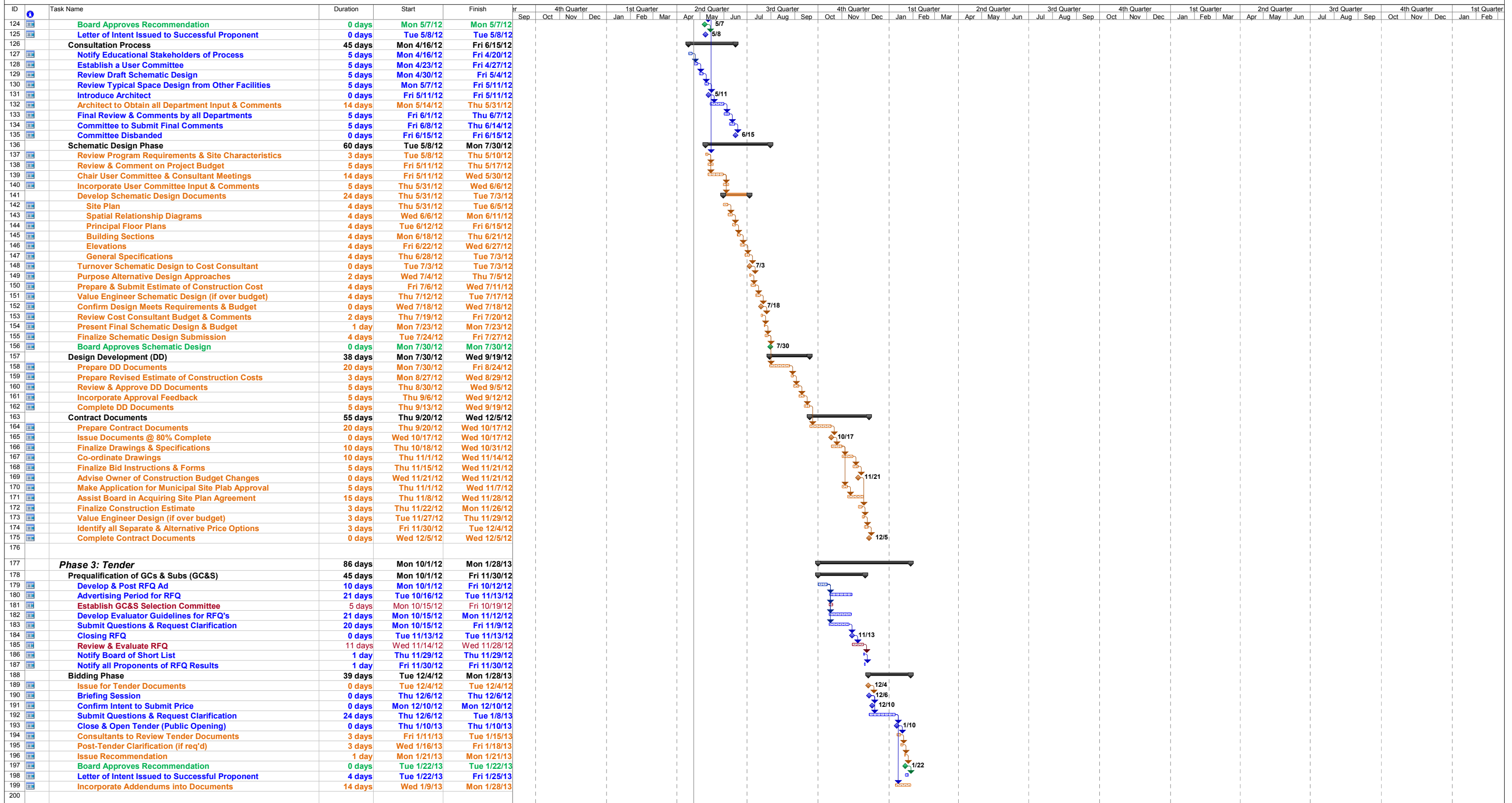
The schedule legend is as follows:

Colour	Represents
Blue	Board
Green	Board Approval
Red	Ministry of Education
Gold	Architect
Purple	Committees (ASC, User, GC)

# Sarnia Secondary Schools - Consolidation Project



# Sarnia Secondary Schools - Consolidation Project



Project: 715-CP1201  
Date: Mon 4/23/12

Task Split  
Milestone Summary  
Project Summary External Tasks  
External MileTask Inactive Task  
Inactive Milestone Inactive Summary  
Manual Task Duration-only  
Manual Summary Rollup Manual Summary  
Start-only Finish-only  
Progress Split

Page 2

