



**REGIONAL DISTRICT  
of Fraser-Fort George**

**REQUEST FOR PROPOSALS ADM-21-01**

**ASSET MANAGEMENT REPORTING**



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Regional District of Fraser-Fort George  
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<http://www.rdffg.bc.ca>

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**REQUEST FOR PROPOSALS – ASSET MANAGEMENT REPORTING ADM-21-01**  
**Issue Date: April 19, 2021**

**1.0 RFP DOCUMENTS**

RFP documents may be obtained on, or after the Issue Date as follows:

- a) in a PDF (public document format) file format from the Regional District's website at [www.rdffg.bc.ca](http://www.rdffg.bc.ca); or
- b) on the BC Bid website at [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca).

All subsequent information regarding this RFP, including amendments, addenda and answers to questions will also be available as above.

**2.0 DELIVERY OF PROPOSALS AND CLOSING DATE**

Proposals must be in English and must be submitted using the submission methods below. The submission must include a cover letter that identifies the RFP, identifies the Proponent and includes the signature of an authorized representative of the Proponent that confirms the Proponent's intent to be bound to the RFP process.

The Regional District will accept Proposals submitted by email or by delivery directly to the Regional District main office. All Proposals must be submitted to the Regional District's General Manager of Financial Services by 2:00 p.m. (local time) on Friday May 14<sup>th</sup>, 2021.

Proposals submitted by fax will **NOT** be accepted. Any Proposal received after the closing date and time will be considered disqualified and will be returned to the Proponent.

Submissions must be directly delivered to the Regional District in either:

- Email format with the Proposal attached to the email in a PDF, or equivalent, format and emailed to [purchasing@rdffg.bc.ca](mailto:purchasing@rdffg.bc.ca). The subject line should read "**ADM-21-01 – Asset Management Reporting – [Proponent's Name]**"; **or**
- Electronic format submitted on a USB readable device with the Proposal in a PDF, or equivalent, format; **or**
- Hard copy format with three (3) complete Proposal copies.

If submitting in a mail format (USB or hard copy), proponents should submit it in a sealed envelope with the following information written on the outside of the envelope containing the Proposal, as well as on the outside of the courier envelope (if sending by courier):

1. Attention: General Manager of Financial Services  
Regional District of Fraser-Fort George  
3<sup>rd</sup> Floor, 155 George Street, Prince George, BC V2L 1P8
2. Request for Proposals  
ADM-21-01 – Asset Management Reporting
3. Responding Proponent's name and address.



### **3.0 PROPONENTS MEETING**

There will be no proponent's meeting for this RFP.

Questions relating to this RFP must be made in writing and emailed directly to the Project Manager:

Jim Martin  
Chief Administrative Officer  
[jmartin@rdffg.bc.ca](mailto:jmartin@rdffg.bc.ca)

**Deadline for question submissions is 5:00 p.m. (local time) May 7<sup>th</sup>, 2021.**

Those questions that are determined to be of a common interest to all potential proponents will be summarized and posted as Addendum(s) on the website.

### **4.0 SUMMARY OF OPPORTUNITY**

The Regional District of Fraser-Fort George is progressing in the development of its asset management program. The Regional District has 51 separate services with assets. The next step for the Regional District is to develop a recording structure that fits within the unique financial reporting structure of regional districts. The Regional District is interested in receiving proposals from proponents that believe they understand the financial elements of regional districts in respect of their service budget structure and can develop an asset management documenting structure to meet the specific asset management reporting needs of a regional district.

The budget for this project is \$30,000. A portion of project funding is being provided by the UBCM under its Asset Management Planning Program.

Desired Outcomes:

There are two primary outcomes expected through this project:

1) Service Asset Management Plan - Template

Creation of a template document that would serve to have a common approach to reporting on asset management planning for each regional district service. This template would be used by each business unit to populate their progress in asset management.

2) Regional District Asset Management Program Report

Creation of an overarching report that provides an overview summary of the individual Service Asset Management Plans. The Program Report will define the common approaches for implementation, assessment and planning practices as well as defining corporate reporting structures so the Board and Senior Management Team is able to evaluate and monitor individual service asset management plans in a collective manner.



**5.0 RFP PROCESS RULES**

**5.1 Definitions**

“Addenda” or “Addendum”	Means	all additional information regarding this RFP including amendments to the RFP.
“BC Bid”	Means	the BC Bid website located at <a href="http://www.bcbid.gov.bc.ca">www.bcbid.gov.bc.ca</a> .
“Board”	Means	the Board of the Regional District.
“Closing Location”	means	includes the location or email address for submissions indicated on the cover page of this RFP, as applicable.
“Closing Time”	means	the closing time and date for this RFP as set out on the cover page of this RFP.
“Contract”	means	the final agreement that comprises a completed set of the Proponent’s RFP submission, this RFP and all documents, specifications, and addenda incorporated therein.
“Contractor”	means	the successful Proponent to the RFP who enters into a Contract with the Regional District.
“Project Manager”	means	the Regional District’s representative.
“Proponent”	means	an individual or firm that submits, or intends to submit, a proposal response to this Request for Proposal.
“Proposal”	means	a submission in response to this Request for Proposals.
“Regional District” or “RDFFG”	means	the Regional District of Fraser-Fort George.
“Request for Proposals” or “RFP”	means	the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits as may be modified in writing from time to time by the Regional District by Addenda.
“must”	means	a requirement that must be met in order for the Proposal to receive consideration.
“should” or “may”	means	a requirement having a significant degree of importance to the objective of the request for Proposals, but which the Regional District would strongly prefer to be fulfilled, and which the Regional District may in its sole discretion elect to treat the failure to fulfill as a grounds for rejection of a Proposal.

**5.2 Acceptance of Terms and Conditions**

Submitting a Proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

**5.3 Submission of Proposal**

Proposals must be submitted before the Closing Time using one of the submission methods set out in Section 2.0 of this RFP. Proposals must not be sent by fax. The Proponent is solely responsible for ensuring that, regardless of the submission method selected, the Regional District



receives a complete Proposal, including all attachments or enclosures, before the Closing Time.

#### 5.4 Errors, Omissions, Clarifications

It is the sole responsibility of the Proponent to ascertain that they have received a full set of the RFP documents. Upon submission of their Proposal, the Proponent will be deemed conclusively to have been in possession of a full set of the RFP documents.

Proponents finding discrepancies, errors, or omissions in this RFP, or requiring clarification on the meaning or intent of any part therein, should immediately request clarification from the Project Manager, by email to [jmartin@rdffg.bc.ca](mailto:jmartin@rdffg.bc.ca).

All requests for clarification or inquiries must be made by 5 pm on Monday, May 10<sup>th</sup>, in order that addendum(s), if necessary, are issued in time for all Proponents to complete their Proposal submission and have it delivered to the Regional District office prior to the Closing Time on the submission date.

If the Regional District, in the Regional District's sole discretion, determines that a clarification, addition, deletion, or revision of this RFP is required, then the Regional District will issue an addendum and the addendum will be posted on the Regional District's website and BC Bid.

**It is the sole responsibility of the Proponent to check for addendums.**

#### 5.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete Proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated. In case of a dispute, the Proposal receipt time as recorded by the Regional District at the Closing Location will prevail whether accurate or not.

#### 5.6 Changes to Proposals

By submitting written notice, the Proponent may amend or withdraw its Proposal before the Closing Time. Proponents should use a consistent submission method for submitting Proposals and any amendments or withdrawals.

#### 5.7 Conflict of Interest

When submitting a Proposal, the Proponent must complete, sign and include with their Proposal a Conflict of Interest Disclosure Statement (Appendix B).

The Regional District may reject a Proposal based on an actual, potential or perceived conflict of interest.

The Regional District may reject any Proposal where:

- a. one or more of the directors, officers, principals, partners, senior management employees, shareholders or owners of the Proponent, is an officer, employee or director of the Regional District or a consultant involved in the procurement process, or is a member of the immediate family of an officer, employee or director of the Regional District or a consultant involved in the procurement process; or



- b. in the case of a Proposal submitted by a Proponent who is an individual person, where that individual is an officer, employee or director of the Regional District or a consultant involved in the procurement process, or is a member of the immediate family of an officer, employee or director of the Regional District or a consultant involved in the procurement process.

#### 5.8 Sub-Contractors

All sub-contractors, including affiliates of the Proponent, should be clearly identified in the Proposal.

A Proponent may not sub-contract to a firm or individual whose current or past corporate or other interests, may, in the Regional District's opinion, give rise to an actual, perceived or potential conflict of interest in connection with the services described in this RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of this RFP or a relationship with any employee, contractor or representative of the Regional District involved in preparation of this RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed sub-contractor might be in a conflict of interest, the Proponent should consult with the Project Manager prior to submitting a Proposal. By submitting a Proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual, perceived or potential, in respect of this RFP.

#### 5.9 Rejection of Proposal

The Regional District may, in its sole discretion, reject any and all Proposals, or accept the Proposal deemed most favourable in the interests of the Regional District. The lowest price, or any Proposal, will not necessarily be awarded.

Proposals which contain qualifying conditions or otherwise fail to conform to the instructions contained in this RFP may be disqualified or rejected. The Regional District may, however, in its sole discretion, reject or retain for its consideration Proposals which are non-conforming because they do not contain the content or form required by this RFP, or for failure to comply with the process for submission set out in this RFP, whether or not such non-compliance is material.

The Regional District's intent is to enter into a Contract with the Proponent who has submitted the best value proposal. The Regional District reserves the right to accept any or none of the Proposals submitted and will evaluate Proposals based on the best value offered to the Regional District and not necessarily the lowest price, using the criteria specified in this RFP. The Regional District reserves the right in its sole unrestricted discretion to:

- a. accept any Proposal which the Regional District deems most advantageous to itself;
- b. reject any and/or all irregularities in a Proposal submitted;
- c. waive any defect or deficiency in a Proposal whether or not that defect or deficiency materially affects the Proposal and accept that Proposal;
- d. reject any and/or all Proposals for any reason, without discussion with the Proponent(s);
- e. accept a Proposal which is not the lowest price Proposal; and
- f. cancel or reissue this RFP without any changes.



Without limiting any other provision of this RFP, the Regional District may, in its sole discretion, reject a Proposal submitted by a Proponent, if the Proponent or any officer or director of a corporate Proponent, is, or has been within a period of two years prior to the Closing Time, engaged either directly or indirectly through another corporation or legal entity in a legal proceeding initiated in any court against the Regional District in relation to any contract with, or works or services provided to the Regional District.

#### 5.10 Liability for Errors

The Regional District will not be responsible for any costs incurred by Proponents as a result of the preparation or submission of a Proposal pertaining to this RFP. The accuracy and completeness of the Proposal is the Proponent's responsibility. If errors are discovered, they will be corrected by the Proponent at their expense.

Proponents acknowledge that the Regional District, in the preparation of this RFP, supply of oral or written information to Proponents, review of Proposals or the carrying out of the Regional District's responsibilities under this RFP, does not owe a duty of care to the Proponents.

#### 5.11 Limitation of Liability

Each Proponent, by submitting a Proposal, irrevocably waives any claim, action, or proceeding against the Regional District including without limitation any judicial review or injunction application or against any of the Regional District's employees, advisors or representatives for damages, expenses or costs including costs of Proposal preparation, loss of profits, loss of opportunity or any consequential loss for any reason including: any actual or alleged unfairness on the part of the Regional District at any stage of the Request for Proposal process; if the Regional District does not award or execute a contract; or, if the Regional District is subsequently determined to have accepted a noncompliant Proposal or otherwise breached or fundamentally breached the terms of this Request for Proposals, with the exception of fraud on the Regional District's part.

#### 5.12 Ownership of Proposals and Freedom of information

Proposals will be received and held in confidence by the Regional District, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this RFP. Each Proposal should clearly identify any information that is considered to be confidential or proprietary information.

All documents, including Proposals, submitted to the Regional District become the property of the Regional District.

The Proponents acknowledge that certain details of the Proposals could be discussed at an open meeting of the Board.

#### 5.13 Confidentiality

In accordance with the *Freedom of Information and Protection of Privacy Act*, the Proponents will treat as confidential and will not, without prior written consent of the Regional District, publish, release, or disclose, or permit to be published, released, or disclosed, any information supplied to, obtained by, or which comes to the knowledge of the Proponents as a result of this RFP except insofar as such publication, release or disclosure is required by





the laws of British Columbia.

#### 5.14 Obligation to Hold Prices

In order to receive consideration, Proponents are required to hold their Proposal open for acceptance for nine weeks following the Closing Time.

### 6.0 PROPOSAL FORMAT

The following format and sequence should be followed in order to provide consistency in responses and to ensure each Proposal receives full and complete consideration. All pages should be consecutively numbered.

- a. Title page, including RFP number and title, Proponent's name and address, telephone number, email address, and contact representative.
- b. One-page cover letter of introduction **SIGNED** by the authorized signatory of the Proponent and includes the signature of an authorized representative of the Proponent that confirms the Proponent's intent to be bound to the RFP process.
- c. Table of contents including page numbers.
- d. A summary of the key features of the Proposal.
- e. Completed and signed Appendix B, Conflict of Interest Disclosure Statement.
- f. Workplan including methodology, start date, milestones, and completion date.
- g. Three (3) references that may be contacted for purposes of confirming your company's experience.
- h. **All amendments and addenda, if any, issued for this RFP. Each amendment and addenda should be signed by the Proponent and should be included with the Proposal and will form part of the Proposal and Contract.**

### 7.0 PROPOSAL EVALUATION

#### 7.1 Proposal Evaluation

All Proposals will be evaluated by the Regional District to assess the qualifications and capabilities of Proponents to meet the minimum standards specified in the RFP. Proposals will be assessed by a committee formed by the Regional District.

#### 7.2 Selected Proponent Negotiations

The Regional District, in its sole discretion, may enter into contract negotiations with a selected Proponent, or Proponents, based only on the evaluation of the written Proposal(s), and/or an evaluation of the combination of the written Proposals and/or detailed discussions.



The Regional District may enter into negotiations with any Proponent without requiring any other Proponents to make any presentations or require any other Proponents to enter into detailed discussions with the Regional District.

### 7.3 Termination of Negotiations and/or RFP Process

The Regional District may terminate contract negotiations with any Proponent and enter into contract negotiations with any other Proponent if, in the opinion of the Regional District at any time, the contract negotiations with the initially selected Proponent will not be satisfactorily completed in the best interests of the Regional District. The Regional District may, in its sole discretion, reject any or all Proposals at any time throughout the Proposal evaluation, Proponent selection, or contract negotiation process.

### 7.4 Compliance with RFP Requirements

All terms and conditions of this RFP are assumed to be accepted by the Proponent and incorporated in its Proposal.

All items in the Proposal that are **not** in full compliance, or that vary from the specific requirements, should be clearly identified in the Proposal as non-compliant and/or variant, and should include specific reference to the relevant section in this RFP and the precise nature of the variance or non-compliance. Non-compliance or variances with the specific RFP requirements will not necessarily result in rejection of a Proposal.

The acceptance or rejection of all non-compliant items, and/or variances to the RFP requirements, will be in the sole discretion of the Regional District, without any obligation by the Regional District to either request clarifications, enter detailed discussions, or negotiations with the Proponent(s).



**8.0 SELECTION AND EVALUATION**

8.1 Selection Criteria

The following are the criteria and the percentage of the total score for each criterion that will be used by the Regional District to select a Proponent. The list of criteria is not in any particular order of priority. The Regional District, in its sole judgment, will base the selection of a successful Proponent on a combination of the criteria.

8.2 Evaluation Criteria

<b>ADM-21-01 – ASSET MANAGEMENT REPORTING</b>	
<b>EVALUATION CRITERIA</b>	<b>WEIGHT</b>
Proposal Quality & Clarity	5
Understanding of Engagement	10
Proponent/Team Qualifications and Experience	20
Workplan Approach Methodology and Timeline / Proposed Solution	25
Experience with Local Government Asset Management Reporting in a Regional District context and references	30
Proposed All-Inclusive Fees	10
<b>Total</b>	<b>100</b>

Additional information regarding the evaluation criteria is as follows:

- a) Understanding of Engagement
  - i. The Proposal should demonstrate a clear and coherent understanding of the Regional District’s requirements and needs.
  - ii. Demonstrated understanding of regional district financial and budgeting structure, sub-regional and local service structures and generally, local government asset management reporting.
  - iii. Indicate why you are interested in the Regional District as a client.
  - iv. Demonstrate understanding of Regional District structure and governance.
  
- b) Proponent/ Team Qualifications and Experience
  - i. Provide overview of Proponent’s history and current leadership team.
  - ii. Provide details of Proponent’s experience and team members experience with clients of similar size and complexity.
  - iii. Provide information on how the Proponent ensures their staff is up to date with requirements pertaining to asset management reporting.
  - iv. Provide details regarding the Proponent’s business continuity planning and pandemic response and how it could be utilized for this engagement if necessary.
  - v. Provide examples of value-added services provided by the Proponent to its clients.
  - vi. Provide resumes of proposed team members.
  - vii. Provide detailed information on any partners / sub-contractors the Proponent intends to use.



- c) Reporting Workplan Approach, Methodology and Timeline
  - i. A statement of understanding of the services to be performed and the ability and commitment to fulfill the responsibilities as described.
  - ii. Details of proposed methodology to complete the project, including approach to stakeholder consultation and any fieldwork and the timing and duration of each.
  - iii. Detail the time required at the Regional District's office based on the proposed workplan.
  - iv. Detail the expected time required of Regional District staff based on the proposed workplan.
  - v. Provide details of any additional and/or value-added services that may be of benefit to the Regional District both within the project budget cap and additional optional elements.
  
- d) Experience with Local Government Asset Management Reporting Reports
  - i. Provide details of Proponent's experience undertaking Asset Management Reporting for local governments of similar size and scope.
  - ii. Outline specific local government Asset Management Reporting expertise on the proposed team.
  - iii. Proponents should identify a minimum of three (3) local government references for which the Proponent has performed Asset Management Reporting services in the last three (3) years, complete with the name of the Project Manager for the organization and their contact information.
  
- e) Proposed All-Inclusive Fees
  - i. Provide all-inclusive pricing information relative to performing the proposed work. This price should be inclusive of all direct and indirect costs, including out of pocket expenses.
    - Include the pricing for each stage of the workplan
  - ii. Provide an estimate of the total number of person hours required to provide services.
  - iii. Provide hourly rates for each category of staff for additional work.
  - iv. Provide pricing structure (hourly rates or lump sum) for special projects or additional value-added services beyond the scope of this project.

## **9.0 CONTRACT**

### **9.1 Form of Contract**

The proponent will be required to enter into a service agreement prior to commencing work and subject to negotiation between the Regional District and the Proponent. The contract will include this RFP, Conflict of Interest Disclosure Statement, all appendices, amendments and addenda, as well as the successful Proponent's submission.

The successful Proponent will also have to meet the following requirements:

- Be compliant with BC Occupational Health and Safety statutes and supply documentation supporting such
- Meet a number of insurance provisions including Commercial General Liability in an amount of at least \$2,000,000
- All materials produced will become the exclusive property of the Regional District



9.2 Notification

Approval of a proponent and the award of a Contract is expected to occur by June 7<sup>th</sup>, 2021. The Regional District, in its sole judgment, may delay the award of Contract date as deemed appropriate by the Regional District.

**10.0 CONTRACT PRICE**

The project budget is capped at \$30,000. All prices for the work are to be Canadian dollars. Taxes are considered extra to the project budget cap and should be shown as separate line item. Any applicable Federal or Provincial taxes, or levies, must be included in the Total Contract Price.



## **Appendix “A” SCOPE OF WORK**

### 1. Background

#### **Regional District of Fraser Fort-George**

The Regional District was incorporated in 1967 and is located in the central interior of British Columbia. The Regional District is a federation of four (4) municipalities and seven (7) electoral areas and is governed by a fourteen (14) member board.

In 2016 Regional District staff and elected officials started to participate in workshops and educational session regarding asset management. The Regional District’s first step in formalizing its commitment towards Asset Management was the approval of an implementation strategy which was approved by the Board of Directors in December of 2017. This strategy provides the framework for the Regional District to move forward in the development of a program that embraces best practices in asset management to support sustainable service delivery in the unique financial structure of Regional Districts.

The objectives of the Regional District’s Asset Management Program are:

- Sustainable service delivery
- Recognition of true life cycle value an asset
- Provision of reliable financial information for evaluating and determining sustainable levels of service
- Predictable infrastructure investment
- Responsible debt management
- Responsive to the negative impacts related to climate change
- Efficient and effective maintenance investment that allows for reasonable efforts to expand the life of an asset
- Sustainable reserve investment and spending
- Practices and procedures that complement and support business practices that are incremental and scalable to Services under review
- Implementation is consistent with the Strategic Priorities and financial/resource capabilities of the Regional District.

In relation to the Asset Management for Sustainable Service Delivery: A BC Framework, the Regional District is taking a multifaceted approach and delving into portions of each of the four core elements prioritizing asset management efforts on assets that are considered the oldest, those that may have the greatest financial challenges to support asset maintenance and renewal and a continued commitment to asset management reserve contributions. From an operational point of view the Regional District has done the following:

- Invested in training of personal that manage and maintain assets with a commitment for ongoing training
- Inventoried all assets under the care of the Regional District to determine and prioritize condition assessment efforts
- Completed 23 condition assessments on a variety of buildings including recreation facilities, community halls, libraries, volunteer fire departments
- Created asset management reserves for each of 51 services that have assets associated with the service for an accumulative reserve amounts of \$46,000,000



- Committed \$2,620,500 from the Northern Capital Planning Grant to 35 local services that mainly service smaller communities to support asset maintenance
- Received UBCM grant funding for the purpose of creating service specific AM Plans and an overarching Plan for the service specific plans to create a sustainable financial structure
- Require that competitive bid processes require asset management information for the life-cycle maintenance and renewal of an asset subject as an output to the competitive bid process

### **Other**

To assist in the preparation of Proposals, the following documents are provided as separate documents on the Regional District's procurement website <http://www.rdffg.bc.ca/services/financial/procurement> :

- Regional District Asset Management Strategy
- Examples of Completed Condition Assessment Reports including the supporting Excel data sheet and Annual Service Operating Budget Documents for each of the facilities.  
This includes a:
  - fire department service (Beaverly Fire Rescue)
  - museum building service (Exploration Place)
  - library building service (Robson Valley Exploration and Learning Centre)
  - arena and community hall service (Robson Valley Recreation Centre)

## **2. Scope of Services**

The Regional District of Fraser-Fort George is progressing in the development of its asset management program. The Regional District has 51 separate services with assets such as rolling stock (fire trucks, light duty vehicles, maintenance equipment), building (arenas, fire halls, community buildings, heritage buildings), small community water and sewer services, solid waste operations infrastructure, and radio communications and IT infrastructure. The Regional District has undertaken a number of facility conditions assessments for assets such as volunteer fire halls, community buildings and recreation centres. The next step for the Regional District is to develop a recording structure that fits within the unique financial reporting structure of regional districts. In reviewing the typical format of a municipal asset management planning and reporting documents, the Regional District is not satisfied that this is a suitable format for regional districts due to the difference between municipalities and regional districts in their financial and service delivery structures.

The Regional District is interested in receiving proposals from proponents that believe they understand the financial elements of regional districts in respect of their service budget structure and can develop an asset management documenting structure to meet the specific asset management reporting needs of a regional district.

The budget for this project is \$30,000. A portion of project funding is being provided by the UBCM under its Asset Management Planning Program.



Desired Outcomes:

There are two primary outcomes expected through this project:

1) **Service Asset Management Plan - Template**

Creation of a template document that would serve to have a common approach to reporting on asset management planning for each regional district service. The plan would detail information such as asset condition, risk analysis, Level of Service, life-cycle cost analysis, priority setting and financial planning that supports the sustainable operation and maintenance of assets within an individual service and its unique funding envelope. This template would be used by each business unit to populate their progress in asset management.

2) **Regional District Asset Management Program Report**

Creation of an overarching report that provides an overview summary of the individual Service Asset Management Plans. The Program Report will also define the common approaches for implementation, assessment and planning practices as well as defining corporate reporting structures, so the Board and Senior Management Team is able to evaluate and monitor individual service asset management plans in a collective manner.

Within the budget cap, proponents are able and encouraged to provide value added elements that will assist the Regional District in advancing its asset management strategy. This might include additional reporting recommendations or data spreadsheets for input and merging of information.

All finished reports and supporting documentation provided as result of this work must become the property of the Regional District for its exclusive use. All documents must be provided in hard copy and an electronic format. All text documents must be in a Microsoft WORD and PDF format. All data documents must be in a Microsoft Excel format.

3. **Schedule**

The proponent will propose a work schedule. For the purpose of scheduling, the project will need to be completed no later than September 30<sup>th</sup>, 2021. Earlier completion dates are acceptable.

4. **Project Budget**

The target budget for this project is \$30,000 inclusive of expenses. Taxes are extra to the cap.

The Regional District may consider proposals that provide additional and/or value added services. The Regional District may negotiate these additional and/or value added services at a later date.





The Proponent's are encouraged to submit a schedule of prices within their proposal detailing each project element and the budget for that element. The following is an example of a schedule of prices.

#	Project Element	Time Estimate	Budget
1	Project initiation, research, analysis, and consultation		\$
2	Development of draft documents and other identified deliverables		\$
3.	Review and revision of draft documents and other identifiable deliverables with Regional District staff		\$
4.	Delivery of final documents, templates and other identifiable deliverables		\$
5.	Presentation and training to Regional District staff		\$
6.	Taxes		\$
	<b>TOTAL:</b>		<b>\$</b>

5. Project Process and Reporting Structure

The successful proponent will be required to liaise with Regional District staff throughout the project. Staff will be available on an ongoing basis to discuss issues as they arise. All work must be approved by and carried out to the satisfaction of the Regional District.



**Appendix "B"**  
**CONFLICT OF INTEREST DISCLOSURE STATEMENT**

**PROCUREMENT PROCESS**

ADM-21-01 – Asset Management Reporting

Proponent Name: \_\_\_\_\_

The Proponent, including its officers, employees, and any person or other entity working on behalf of or in conjunction with, the Proponent on this Procurement Process:

- is free of any conflict of interest that could be perceived to improperly influence the outcome of this procurement process.
- has not, and will not, participate in any improper procurement practices that can provide the Vendor with an unfair competitive advantage including obtaining and using insider type information to prepare a solicitation offer or participating in bid rigging.
- has an actual, perceived or potential conflict of interest regarding this procurement process as a result of:

State reason(s) for Conflict of Interest:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

By signing below, I certify that all statements made on this form are true and correct to the best of my knowledge.

\_\_\_\_\_  
Signature of Person Making Disclosure

\_\_\_\_\_  
Print Name of Person Signing Disclosure

\_\_\_\_\_  
Date Signed