

REQUEST FOR PROPOSALS

Living Lakes Canada Society



Issued: April 28, 2023

Closing Location:
Nelson, British Columbia

Closing Date and Time:
May 22, 2023 at 11:00 PM PST

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1 PART 1 – INVITATION & INSTRUCTIONS TO PROPONENTS

1.1 Executive Summary

Request for Proposal

The Living Lakes Canada Society (LLC) is requesting proposals from qualified agencies to survey Fraser Lake, in the Bulkley-Nechako region of central British Columbia.

Timeline of milestones and deliverables:

Table 1. Project Schedule

Name	Deadline	Description
Request for Proposal Opens	April 28, 2023	Submissions accepted for this Request for Proposal.
Request for Proposal Closes	May 22, 2023	Submissions received after this date will not qualify for review.
Contract Awarded	May 26, 2023	Selected proponents will be notified via email.
Contract Executed	June 9, 2023	Contracts must be signed by LLC and selected proponents. Valid proof of insurance must be provided by the Consultant to LLC.
Milestone 1 (M1)	Dec 31, 2023	Draft FIM report and final database submitted to LLC for review and comment.
Milestone 2 (M2)	Feb 15, 2024	Draft FDG report and maps submitted to LLC for review and comment.
Deliverables Submitted	Mar 31, 2024	All final deliverables submitted to LLC.

1.1 Request for Proposal Terminology

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

Throughout this Request for Proposal, terminology is used as follows:

- a) **“Contract”** means the written agreement resulting from this Request for Proposal executed by the LLC and the Consultant;
- b) **“Consultant”** means the successful Proponent to this Request for Proposal who enters into a written Contract with the LLC;
- c) **“Must”** or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;
- d) **“Proponent”** means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal;

- e) “**Should**” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal;

1.2 Proposal Documents

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

1.3 Inquiries and Clarifications

It is the responsibility of the Proponent to thoroughly examine the documents and ensure that the requirements contained are fully understood.

Requests for clarifications or additional information related to this Request for Proposal should be directed, **in writing**, to the following person:

Georgia Peck
Program Manager
georgia@livinglakescanada.ca

Information obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be distributed to all Proponents at LLC option.

1.4 Examination of Sites and Local Conditions

The Proponent must satisfy themselves as to the practicability of executing the work in accordance with the Contract, and shall be held to have satisfied themselves in every particular before making up a Proposal, by inquiry and by attending the site visit if it is a requirement.

The Proponent should examine the site and surroundings and, before submitting a Proposal shall satisfy themselves as to the nature of the site, the quantities and nature of the work and equipment necessary for the completion of the work, the means of access to the site, the accommodation they may require, and in general, shall obtain all relevant information as to risks, contingencies and other circumstances which may influence their Proposal.

1.5 Mandatory Site Visit

A site visit prior to field work is highly encouraged. LLC will be coordinating a field reconnaissance trip to project location, prior to field survey.

1.6 Proposal Closing Date, Time and Location

Proposals must be submitted by the Closing Date and Time to the Closing Location identified on the cover page of this Request for Proposal.

1.7 Proposal Submissions

A digital PDF format of the Proposal submission may be sent by e-mail to: **georgia@livinglakescanada.ca, with the email subject line “Proposal – Fraser Lake Inventory Using FIMP 2023”**

The LLC email server has about a 10mb file size limit. Proponents are to ensure that they have gotten a confirmation of receipt of email prior to the closing time. Larger submissions should be broken down into 2 or more emails or arrangements should be made ahead of time for file transfer by ftp.

Proponents wishing to send or deliver a Proposal submission in paper format to the LLC should submit one printed copy in a SEALED envelope CLEARLY MARKED **“Proposal – Fraser Lake Inventory Using FIMP 2023”**

1. The Proponent’s name and full mailing address should be clearly marked on the outside of the response envelope.
2. Faxed proposals will not be accepted.

1.8 Ownership of Proposals and Freedom of Information

All responses to this Request for Proposal become the property of the LLC. By submitting a Proposal, the Proponent agrees the LLC has the right to copy the Proposal Documents. Proposals will be held in confidence by the LLC, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and any requirement for disclosure of all or a part of a Proposal under that Act. The requirement for confidentiality shall not apply to any Proposal that is incorporated into a Contract for the Work. Further, the LLC may disclose all or part of any Proposal to the proposal review committee, at a public meeting of the Board, or when making a recommendation for the award of the Contract.

1.9 LLC Right to Accept or Reject Proposal

The lowest cost or any Proposal will not necessarily be accepted. The LLC reserves the right in its absolute discretion to: accept the Proposal which it deems most advantageous and favourable in the interests of the LLC; and waive informalities in, or reject any or all Proposals, in each case without giving any notice.

If there is only one compliant Proposal received by the Closing Date, the LLC reserves the right to accept the Proposal or cancel the Proposal process with no further consideration for the sole Proposal. This includes the right to cancel this Request for Proposal at any time prior to entering into a Contract with the Consultant. The LLC reserves the right to cancel at any time before award of the Contract without being obliged to any Proponent—not just where there is only one compliant Proposal.

Proposals that contain qualifying conditions or otherwise fail to conform to these Instructions to Proponents may be disqualified or rejected. The LLC, however, may at its sole discretion reject or retain for consideration Proposals which are non-conforming because they do not contain the content or form required by these Instructions to Proponents or because they have not complied with the process for submission set out herein.

1.10 No Claim for Compensation

Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the Request for Proposal, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim. In no event will the LLC be responsible for the costs of preparation or submission of a Proposal.

1.11 Conflict of Interest

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent has any financial or personal relationship or affiliation with any elected official or employee of the LLC or their immediate families which might in any way be seen (in the LLC sole and unfettered discretion) to create a conflict. If the proponent is uncertain as to whether a conflict of interest (or perceived conflict of interest) exists, then the proponent must disclose all reasonably relevant details so that the LLC may make a determination. The LLC may, at its sole discretion, reject or retain for consideration Proposals for which potential conflicts of interest are deemed to exist.

1.12 Anti-Collusion, Fraud & Corruption

The Proponent shall not communicate to any person prior to the opening of Proposals (other than to the LLC through the delivery of a Proposal in the prescribed manner) the amount of any Proposal, or at any time adjust the amount of any Proposal by arrangement with any other persons, make any arrangement with any other person about whether or not he or that other person should or should not submit a Proposal or otherwise collude with any other person in any manner whatsoever in the Proposal process.

Any breach of this provision or non-compliance on the part of a Proponent shall, without affecting the Proponent's liability for such breach or non-compliance, result in the Proposal's disqualification.

1.13 Confidentiality

Confidential information about the LLC obtained by Proponents must not be disclosed unless authorized to do so, in writing, by the LLC. The Proponent agrees that his obligation of confidentiality will survive the termination of any Contract awarded under this Proposal process.

1.14 Irrevocability and Acceptance of Proposal

After the Closing Date and Time, all Proposals are irrevocable. By submission of a Proposal, the Proponent agrees that should its Proposal be successful the Proponent will enter into a Contract with the LLC for the Work on the terms and conditions set out in the Proposal. Each Proposal will be irrevocable and open for acceptance by the LLC for a period of ninety (90) calendar days from the day following the Proposal Closing Date and Time, even if the Proposal of another Proponent is accepted by the LLC. By submission of a clear and detailed written notice, the Proponent may amend or withdraw its Proposal PRIOR to the Closing Date and Time.

1.15 Irregularities and Informalities

The LLC reserves the right, at its sole discretion to waive minor irregularities and informalities in any Proposal and to seek clarification or additional information on any area of any Proposal when it is in the best interest of the LLC to do so.

1.16 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the specifications or other documents or having any doubts about the meaning or intent of any part thereof should immediately request, in writing, clarification from **Georgia Peck (georgia@livinglakescanada.ca)**, who will send written instructions or explanations to all parties having a set of the Proposal Documents. Any work on a Proposal done by the Proponent after the discovery of discrepancies, errors or omissions, which the Proponent fails to seek clarification about, shall be done at the Proponent's risk.

1.17 Modification of Terms/Addenda

The LLC reserves the right to modify the terms of this Request for Proposal at any time before the Closing Date and Time in its sole discretion. Written Addenda are the only means of amending or clarifying any of the information contained in the information package. The LLC may amend or clarify the information package by issuing an Addendum. No employee or agent of the LLC is authorized to amend or clarify the content of the information package or any Addenda except by issuing an Addendum. The LLC makes no guarantee as to the timely delivery of any Addendum. Addenda issued prior to closing of this Invitation to Proposal shall become a part of the Proposal Documents.

1.18 Liability for Errors

While the LLC has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the LLC, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve the Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

1.19 Basis of Contract Award

1.19.1 General

Proponents are hereby notified that the LLC intends to review and enter into a Contract for the Work based not only on the Proposal price, but the other factors considered essential by the LLC to provide a service for the Work being requested. Proposal evaluation may include, but is not limited to:

- Proponent's suggested approach to the work
- Professional qualification of managerial, technical, and in-field personnel
- Labour rates for key personnel
- Other associated costs to perform the Work
- Staff and corporate experience with projects similar to that being contemplated in the Work
- References provided by other clients of the Proponent

- Experience of the Proponent on past LLC projects
- Confirmation of the proponent's ability to facilitate project completion in accordance with the schedule
- Availability of project team to complete the work in a timely manner
- Compliance with these terms of reference and completeness of the Proposal
- Total project cost
- Proponent's understanding of LLC requirements and expectations
- The overall value that the Proposal represents to the LLC, based on quality, service and price
- Any other value-added benefits offered by the Proponent which are not specifically addressed in this Request for Proposal

The evaluation process will be conducted solely at the discretion of the LLC. The LLC may decide to utilize other criteria in the review of Proposals other than those set forth above; in particular, the price to carry out the work will not be the only or primary criterion that will be utilized by the LLC. The LLC reserves the right to make inquiries regarding any or all Proposals and to verify all information submitted by Proponents. Proponents shall be competent and capable of performing the work. Proponents may be required to provide further evidence of previous experience and financial responsibility.

The LLC reserves the right, at its discretion, to negotiate with any Proponent that the LLC believes has the most advantageous Proposal or with any other Proponent or Proponents concurrently. In no event will the LLC be required to offer any modified terms to any other Proponent prior to entering into a Contract with the successful Proponent, and the LLC shall incur no liability to any other Proponent as a result of such negotiations or modifications.

Proponents are advised that, after receipt of Proposals and prior to award of Contract, Proponents may be required to provide the LLC with additional information concerning the Proponent or their Proposal including, but not limited to, a further breakdown of relevant components of the proposed prices.

The LLC reserves the right to reject any Proposals of a company that is, or whose principals are, at the time of submitting a Proposal, engaged in a lawsuit against the LLC in relation to work similar to that being proposed.

The LLC reserves the right to reject any Proposals of a company that owes, or whose principals owe, monies to the LLC at the time of submitting a Proposal.

1.19.2 Project Specific

Each compliant proposal will be evaluated based on the criteria and weighting outlined in Table 2.

Table 2. Project Scoring Criteria and Weighting

Num.	Criteria	Description	Weight
1	Value	Evaluates the overall cost and breakdown of the proposed budget.	65%
2	Project Team	Evaluates the appropriateness of the Project Team organizational chart.	
3	Technical Expertise	Evaluates the technical expertise and past experience of the Project Team.	
4	Quality and Clarity	Evaluates the proposal's overall quality and clarity.	25%
5	Reputation and Performance Record	Evaluates the reputation and past performance record of the Project Team.	
6	Health, Safety, and Environment	Evaluates the apparent commitment to Health, Safety, and the Environment of the Proponent.	10%
7	Socio-Economic	Evaluates the overall socio-economic benefit provided to local communities.	
TOTAL:			100%

1.20 Definition of Contract

This Request for Proposal should not be construed as an Agreement or Contract to purchase goods or services. The LLC is not bound to enter into a Contract with the Proponent who submits the lowest priced Proposal or with any Proponent. The LLC will be under no obligation to receive further information, whether written or oral, from a Proponent after the Proposal Closing Date and Time.

Neither the acceptance of a Proposal nor the execution of a Contract will constitute approval of any activity or development contemplated in any Proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or bylaw.

Notice in writing to a Proponent that it has been identified as the Consultant and the subsequent full execution of a written Agreement will constitute a Contract for the performance of the Work and no Proponent will acquire any legal or equitable rights or privileges relative to the Work until the occurrence of both such events.

1.21 Form of Contract

By submission of a Proposal, the Proponent agrees that, should it be identified as the successful Proponent, it is willing to enter into a Consulting Services Agreement with the LLC within fifteen (15) days of the date of the Notice of Award. A copy of the LLC Consulting Services Agreement is attached in Appendix A.

By submission of a Proposal, the Proponent agrees that, should it be identified as the Consultant, it is willing to provide to the LLC the necessary Insurance Policies and WorkSafe BC Clearance Letter within fifteen (15) days of the date of the Notice of Award.

2 PART 2 – SPECIFICATIONS

2.1 Introduction

The [Foreshore Integrated Management Planning methodology \(2021\)](#) was recently updated and field-verified through a four-year Contribution Agreement with Fisheries and Oceans Canada (DFO), with funding provided through the *Canada Nature Fund for Aquatic Species at Risk Program*. The goal of the Project was to review and revise the FIMP methodology and apply it to high priority lakes in the Columbia Basin. The updated methodology has now been field-tested in the Columbia Basin and Living Lakes Canada is working to expand these efforts into other regions of British Columbia. The overarching goal of the Project is to improve the quality and quantity of information about lake foreshore habitat integrity and critical species in British Columbia. The information will be shared with government, Indigenous communities, consultants, developers, and other stakeholders to support evidence-based, land-use decision making.

This LLC Project relies heavily on a suite of biological methods referred to as the “Foreshore Integrated Management Planning (FIMP)” methodology. The FIMP methodology is explained in detail in Schleppe et al. (2021) and has three main components:

- 1) **Foreshore Inventory and Mapping (FIM)** is a biological methodology developed by consulting biologists in partnership with DFO. The FIM methodology was derived by adapting an existing stream mapping protocol, called Sensitive Habitat Inventory and Mapping (SHIM), for use on lakes. As the name implies, FIM is used to delineate, inventory, and map lake foreshore habitats.
- 2) **Foreshore Habitat Sensitivity Index (FHSI)** is a quantitative analysis that relies on simple math to help account for, and then reduce multiple biological variables into an intuitive, easy to interpret index. The index consists of five Ecological Ranks (e.g., Very Low, Low, Medium, High, and Very High) that describe the existing habitat value and sensitivity to urban development activities.
- 3) **Foreshore Development Guidelines (FDG)** is a report that summarizes the technical analysis (i.e., the FHSI) and recommends management guidelines to help protect high-value and sensitive habitats located along the lake foreshore.

Living Lakes Canada invites proposals from qualified consulting firms to survey and report on the selected lakes (see Section 2.2.2) using the FIMP methodology.

2.2 Background

2.2.1 Living Lakes Canada

Living Lakes Canada (LLC) is affiliated with Living Lakes International, a global network of over 130 non-government organizations that share the mission to enhance the protection, restoration and rehabilitation of lakes, rivers, wetlands and watersheds throughout the world. Living Lakes Canada is a registered BC Society and charitable organization.

Living Lakes Canada bridges the gap between science and action to foster citizen-based water stewardship. Their mandate is to help Canadians understand the intimate connections between water quantity, water quality, land-use, climate change, biodiversity, and healthy human communities by building a water stewardship ethic that all Canadians can be proud of.

Global Nature Fund, the Lake Winnipeg Foundation, and Wildsight established Living Lakes Canada in 2010 to unite water stewardship groups throughout the country. These three organizations share the common goal of conserving ecosystems for humans and nature, and strive for the protection of lakes, streams, wetlands, and watersheds.

2.2.2 FIMP Project

Request for Proposal

Living Lakes Canada invites proposals from qualified consulting firms to **re-FIMP survey** and report on the following lakes using the [FIMP methodology \(Schleppe et al. 2021\)](#):

1. **Fraser Lake** (approximate latitude and longitude: 54.0562, -124.8496)

2.3 Scope of Work

2.3.1 Instructions to Proponents

Proponents shall review, understand, and incorporate the Key Resources listed in Table 3 into their proposal (and subsequent deliverables).

Where the lake to be surveyed is considered a “re-FIMP” (i.e., the lake has previously been assessed using the FIMP/SHIM/FIM framework once and the next survey would constitute a re-assessment), Proponents must review, understand, and appropriately consider and incorporate all previously completed FIMP-related reports, projects, and publications. Completing this task is considered essential to the quality and credibility of any re-FIMP project.

2.3.2 Key Resources

Proponents shall review, understand, and incorporate the resources listed in Table 1 into their proposal. Note: Table 1 is not an exhaustive list of relevant resources.

Table 3. Key Resources

Resource Reference	Rationale	Available at:
Schleppe, J., L., Porto., and S. McPherson. 2021. Foreshore Integrated Management Planning Methods. Prepared for Living Lakes Canada. Nelson, British Columbia.	This document provides the most up to date and comprehensive explanation of the FIMP methodology. It describes in detail the methodology, equipment, data management, and reporting structure likely required to scope a competitive proposal.	LLC website: https://data.cbwaterhub.ca/dataset/foreshore-inventory-and-mapping-framework/resource/16254d71-0f9e-4ac3-8fc6-cc9d5cea0579
Schleppe, J. and B. Mason. 2009. Standard Methods for Completion of Foreshore Inventory and Mapping Projects. Prepared by: Ecoscape Environmental Consultants Ltd. and The Community Mapping Network.	This document was, until recently, the most up-to-date explanation of the methodology and may contain alternative, yet useful explanations for some activities.	LLC website: http://livinglakescanada.ca/projects/foreshore-inventory-mapping-in-the-columbia-basin/
FIMP reports for several previously surveyed lakes.	The links provide quick access to a number of completed reports for previously surveyed lakes.	Columbia Basin Water Hub: https://data.cbwaterhub.ca/group/foreshore Kootenay Lake Partnership: http://kootenaylakepartnership.com/
Federal, provincial, and municipal sources and inventories such as fish and wildlife inventories.	This information should be used to support various components of the FIMP methods (as explained in Schleppe et al. 2021).	Review Section 2.2 of Schleppe et al. (2021) for examples of relevant federal, provincial, or municipal information sources (e.g., <i>Aerial Imagery, Aerial Imagery, Cadastral, Regional Boundaries, Provincial & Conservational Boundaries, Fisheries & Wildlife data</i>).
First Nations community locations and Traditional Use areas.	This information should be used to support various components of the FIMP methods (as explained in Schleppe et al. 2021).	Province of BC: https://www2.gov.bc.ca/gov/content/environment/natural-resource-stewardship/consulting-with-fir

		st-nations/first-nations-negotiations/first-nations-a-z-listing
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2.3.3 Objectives

The objectives (for a single lake) are to:

1. Complete all aspects of a FIM survey, as outlined in Schleppe et al. 2021;
2. Complete all aspects of the FHSI analysis, as outlined in Schleppe et al. 2021;
3. Complete a Foreshore Development Guideline report, as outlined in Schleppe et al. 2021.

2.3.4 Deliverables

The deliverables (for a single lake) must include two individual documents. A completed report with all 3 components (FIM, FHSI, and FDG) and a separate FDG report. Further details can be found below:

1. Completed FIM survey as outlined in Schleppe et al. 2021 (including, field data collection and entry into electronic database, database QA/QC and formatting, analyses, and final report);
 - QA/QC analysis requires updates to original data and removal of any fail data points as per Schleppe et al. 2021
2. Completed FHSI analysis as outlined in Schleppe et al. 2021 (including, input database, analyses and supporting documentation, maps and GIS-related files, and final report); and
3. Completed FDG final report as outlined in Schleppe et al. 2021 (including, all recommended report sections and content [e.g., figures, tables, maps and GIS-related files]).

2.4 Schedule

The Project schedule is provided in Table 1 (Section 1.1).

Proponents are encouraged to propose a Project Schedule for selected lake. The purpose of providing a schedule is to demonstrate a well-organized and realistic timeframe for completing the proposed work. This information may assist the review committee with scoring proposals. Additional proposal scoring details are provided in Section 1.19.2. It is recommended that the chosen field survey schedule agrees with the considerations and process outlined in Schleppe et al., 2021 (see Key Resources in Table 3).

2.5 Cost

The applicant should clearly present all anticipated costs to complete the scope of work. Costs should be sufficiently explained so that the proposal review committee can assess the amount of time, effort, and cost associated with each component (e.g., lake), phase or deliverable of the Project (e.g., FIM, FHSI, and FDG). This information may assist the review committee with scoring proposals. Additional proposal scoring details are provided in Section 1.19.2.

3 PART 3 – PROPOSAL SUBMISSION

3.1 Proposal Format

The Proposal should clearly convey the Proponent's intent in a clear and concise manner. The Proposal should contain a covering letter, Table of Contents, and a short executive summary of the key features of the proposal. All pages should be consecutively numbered.

3.2 Proposal Content

3.2.1 The Firm

- a. Firm Experience/Past Performance - The firm's past project experience with the FIMP methodology or similar projects (such as lake foreshore inventory, assessment, classification, or mapping experience).
- b. Project Team - The qualifications and experience of the personnel the Proponent intends to use for the Work. This must include any subcontractors proposed to be used in the Work.
- c. Resources - The qualifications and experience of the Proponent's reserve personnel backing up the Project Team and the quality and quantity of resources available to the firm such as technical aids, IT resources, equipment etc.

3.2.2 The Proposal

- a. Methodology/Task Evaluation - The Proponent's approach to the services required as set out in Part 2 Specifications. Consideration is given to whether the Proponent has effectively addressed each aspect of the Request for Proposal, thoroughly understood the requirements of the Request for Proposal (e.g., FIM, FHSI, FDG), chosen a suitable approach, and identified problem areas. The Proponent is expected to adhere as closely as possible to the project components and methods outlined in Part 2; however, Proponents may suggest alternative approaches or propose modifications that they deem improvements over the existing methodology.
- b. Scheduling/Work Plan - The completeness of the task items and rationale of the work plan which shows a clear indication of the anticipated work schedule along with any other supporting documents pertinent to the project. The LLC requests that proponents agree to meet or better the Project Schedule (Table 1) for submitting deliverables. However, Proponents are encouraged to expand on the Project Schedule (Table 1) as they see fit.
- c. Detailed Cost Breakdown – the Proponent should provide a detailed cost breakdown of all work tasks which includes details of the team members assigned to those tasks, hours budgeted for each team member and hourly rates for each team member. Proposal should also include details of Proponent's preferred arrangements for mileage, per diem and other disbursements.

3.3 Proposal Evaluation Criteria

Please see Section 1.19.2 for Project-specific evaluation criteria.

Proponents are encouraged to review and incorporate any aspect or information from this Request for Proposal in their proposal.

4 APPENDIX A - Consulting Services Agreement