

**City of Coquitlam**

**PROPOSAL SUBMISSION FORM**

**RFP No. 24-055**

**External Audit Services**

**Proposals will be received as per date and time in** [**Key Dates Section**](#kdates)

**INSTRUCTIONS FOR PROPOSAL SUBMISSION**

Proposal submissions are to be returned in Microsoft Word and any other supporting documents to be consolidated into one PDF file and uploaded through QFile, the City’s file transfer service accessed at website: [qfile.coquitlam.ca/bid](http://qfile.coquitlam.ca/bid)

**1. In the “Subject Field” enter:** RFP Number and Name

**2. Add files and “Send”**

(Ensure your web browser remains open until you receive 2 emails from QFile to confirm upload is complete.)

Proponents are responsible to allow ample time to complete the Proposal Submission process. If assistance is required phone 604-927-3037.

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| **Legal Name of Proponent** |  |
| **Contact Person and Title** |  |
| **Business Address** |  |
| **Telephone** |  |
| **Email Address** |  |

1. **DEPARTURES AND AWARD**

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| 1. **CONTRACT -** I/We have reviewed the City’s [[Standard Terms and Conditions - Consulting and Professional Services](https://www.coquitlam.ca/DocumentCenter/View/1448/10-02-2019-Standard-Terms-and-Conditions---Consulting-and-Professional-Services-PDF),](https://www.coquitlam.ca/docs/default-source/tender-documents/standard-terms-and-conditions---purchase-of-goods-and-services.pdf)  and would be prepared to enter into in an agreement that incorporates the City’s Standard Terms and Conditions, amended by the following departures (list, if any): | |
| **Section** | **Requested Departure(s) / Alternative(s)** |
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| 1. **SERVICES -** I/We have reviewed the Scope of Services as descibed in this RFP and are prepared to meet those requirements, amended by the following departures and additions (list, if any): |
| **Requirements – Requested Departure(s) / Alternate(s) / Addition(s)** |
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| 1. **AWARD -** For eligibility of award, the City requires the successful Proponent to complete and have the following in place before providing the Goods and Services.   **Section 1c items are not required as part of this Proposal but may be required prior to entering into an agreement with the City.** | |
| 1. **Insurance** – Professional Errors and Omissions Liability and Commercial General Liability as outline on the [City's Certificate of Insurance - Consultant Form](https://www.coquitlam.ca/DocumentCenter/View/1454/Certificate-of-Insurance---Consultant-Form-PDF?bidId=) |  |
| 1. **Vendor Info** - Complete and return the City’s Vendor Profile and Electronic Funds Transfer Application |  |
| 1. **Business License** - A City of Coquitlam or Tri Cities Intermunicipal [Business License](https://www.coquitlam.ca/602/Business-Licences) |  |
| **As of the date of this Proposal, we advise that we have the ability to meet all of the above requirements except as follows (list, if any):** | |
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1. **CORPORATE EXPERIENCE, CAPACITY AND RESOURCES**

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| 1. **CAPABILITIES, CAPACITY AND RESOURCES** - Proponents to provide information on the following (use the spaces provided and/or attach additional pages, if necessary)**:** |
| 1. Structure of the Proponent, background, how many years they have been in business and organizational history (e.g. mission, vision, corporate directions, years in business, etc.): |
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| 1. Proponent is to state any value added benefits and activities they can provide in delivering the Services. Provide details: |
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| 1. Describe your company’s level of knowledge of legislative requirements governing City operations as well as your understand of the requirements and resources needed for local government audits. |
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| 1. **REFERENCES –** Proponent shall be competent and capable of performing the Services requested and successfully delivered service contracts of similar size, scope and complexity. The City reserves the right to contact any person(s), agency(ies) or firm(s) not listed as part of an independent review (use the spaces provided and/or attach additional pages, if necessary): | |
| **Reference No. 1** | |
| **Description of Contract** |  |
| **Size and Scope** |  |
| **Work Performed** |  |
| **Start Date** |  |
| **End Date** |  |
| **Contract Value** |  |
| **Project completed on budget** |  |
| **Project completed on schedule** |  |
| **Reference Information** | Company |
| Name: |
| Phone Number: |
| Email Address: |

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| **Reference No. 2** | |
| **Description of Contract** |  |
| **Size and Scope** |  |
| **Work Performed** |  |
| **Start Date** |  |
| **End Date** |  |
| **Contract Value** |  |
| **Project completed on budget** |  |
| **Project completed on schedule** |  |
| **Reference Information** | Company |
| Name: |
| Phone Number: |
| Email Address: |

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| **Reference No. 3** | |
| **Description of Contract** |  |
| **Size and Scope** |  |
| **Work Performed** |  |
| **Start Date** |  |
| **End Date** |  |
| **Contract Value** |  |
| **Project completed on budget** |  |
| **Project completed on schedule** |  |
| **Reference Information** | Company |
| Name: |
| Phone Number: |
| Email Address: |

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| 1. **KEY PERSONNEL –** Proponent proposes the following key personnel for the Services stated in the RFP. No changes, additions or deletions are to be made to these Key Personnel without the City’s written approval. (use the spaces provided and/or attach additional pages, if necessary) | | | | |
| **LINE ITEM** | **NAME** | **TITLE/POSITION** | **EXPERIENCE AND QUALIFICATIONS** | **YEARS WITH YOUR ORGANIZATION** |
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1. **SUSTAINABLE BENEFITS AND SOCIAL RESPONSIBILITY**

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| 1. Describe all initiatives, policies, programs and product choices that illustrate your firm’s efforts towards sustainable practices and environment responsibility in providing the services that would benefit the City |
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| 1. What policies does your organization have for hiring indigenous peoples, recent immigrants, veterans, young people, women, people with disabilities and any other groups: |
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| 1. What policies does your organization have for the procurement of goods and services from local small and medium sized business or social enterprises or Indigenous owned businesses: |
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| 1. What policies does your organization have to support reconciliation with indigenous peoples: |
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1. **TECHNICAL**

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| 1. **APPROACH and METHODOLOGY**   Summarize the key features of your Proposal and the Technical Approach to be used. Provide a brief description the various components required for successful completion of the Work. |
| 1. Provide a description of the general approach and methodology that the Proponent would take in preforming and managing the City’s requirements for providing the Services. |
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| 1. Briefly describe special issues, challenges, opportunities, or considerations foreseen by the Proponent which may have a significant bearing on the Services. |
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| 1. Describe how the Proponent would manage this project. Include a description of the project structure and describe the communication mechanisms that will be used with City staff. |
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| 1. Describe your process regarding handling staff changes and how you will communicate   that to the City. |
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| 1. Provide a description of the general strategy and approach for communicating and presenting to a public sector audience. |
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1. **FINANCIAL**

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| 1. **SCHEDULE OF FEES AND EFFORT -** The fee schedule shall show an appropriate level of hours/effort for each of the project components, broken down by the Proponent’s team member(s) assigned to each component. The fee schedule shall show the maximum limits that the ‘Consulting Team’ will not exceed unless the City Project Manager requests additional services which are beyond the Scope of Services as outlined in this RFP. Proponent is to include any additional “Optional Services” or costs not accounted for in the fee schedule as part of the Proposal submission. The successful Proponent will not be able to claim any additional cost as a result of changes to the schedule or order of works or for project delays. | | | | | |
| **ITEM NO.** | **TASK/DELIVERABLE** | **Indicate Assigned Staff,**  **Number of Hours, and Rate/Hour** | | | **TOTAL PRICE**  **(LUMP SUM)**  (exclude GST) |
| **TECHNICAL** | | | | | |
|  |  |  |  | $ | $ |
|  |  |  |  | $ | $ |
|  |  |  |  | $ | $ |
|  |  |  |  | $ | $ |
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|  |  |  |  | $ | $ |
| **Total** | | | | | **$** |

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| 1. Upon satisfactory completion of the first twenty four month service period, as reviewed by the City, and in the event the City elects to renew the service period(s) for further one-year periods, the above Task/Deliverables will be adjusted at the following percentages. | | | |
|  | **3rd Term: 2026 – 2027** | **Add / Deduct:** | **%** |
|  | **4th Term: 2027 – 2028** | **Add / Deduct:** | **%** |
|  | **5th Term: 2028 – 2029** | **Add / Deduct:** | **%** |

**Attention Procurement Manager:**

1. **I/We, the undersigned duly authorized representative of the Proponent**, having received and carefully reviewed all of the Proposal documents, including the RFP and any issued addenda posted on the City’s website [www.coquitlam.ca/Bid-Opportunities](http://www.coquitlam.ca/140/Bid-Opportunities) , and having full knowledge of the Site, and having fully informed ourselves as to the intent, difficulties, facilities and local conditions connected to performing the Services~~,~~ submit this Proposal in response to the RFP.
2. **I/We**  agree to the rules of participation outlined in the [Instructions to Proponents](https://www.coquitlam.ca/DocumentCenter/View/1457/Instructions-to-Proponents-PDF) and should our Proposal be selected, agree to the City’s [[Standard Terms and Conditions - Consulting and Professional Services](https://www.coquitlam.ca/DocumentCenter/View/1448/10-02-2019-Standard-Terms-and-Conditions---Consulting-and-Professional-Services-PDF),](https://www.coquitlam.ca/docs/default-source/tender-documents/standard-terms-and-conditions---purchase-of-goods-and-services.pdf)  and will accept the City’s Contract as defined within this RFP document.
3. **I/We acknowledge** receipt of the following Addenda related to this Request for Proposals and have incorporated the information received in preparing this Proposal.

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| **Addendum No.** | **Date Issued** |
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**This Proposal** is submitted this \_\_\_\_day of \_\_\_\_\_\_\_, 20\_\_\_\_\_\_.

**I/We have the authority to sign on behalf of the Proponent and have duly read all documents.**

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| **Name of Proponent** |  |
| **Signature(s) of Authorized Signatory(ies)** | **1.** |
| **2.** |
| **Print Name(s) and Position(s) of Authorized Signatory(ies)** | **1.** |
| **2.** |