Corporation of the City of Port Coquitlam
Request for Proposals
RFP No. 2019-07

Request for Proposal (RFP)
RFP 2019-07 – Benefit Administration

Issue Date: Monday, July 8, 2019

RFP Closing: 14:00:00 Hours (Pacific Time) Thursday, August 8, 2019 (the “Closing Date”)
The City’s office hours are 7:30 am to 4:00 pm Monday to Friday, except statutory holidays.

Proposals must be received before Closing Time to be considered.

RFP Enquiry End Date: 14:00:00 Hours (Pacific Time) Tuesday, July 30, 2019

Submission Locations: Proposals must be submitted using the method below:

EMAIL - the Proponent should email the Proposal to purchasing@portcoquitlam.ca

PDF emailed Proposals are preferred. The maximum file size the City can receive is 10 megabytes (MB).

RFP Contact Person: Don Striha, SCMP
Email: purchasing@portcoquitlam.ca
REQUEST FOR PROPOSALS
TABLE OF CONTENTS

1.0 INTRODUCTION ......................................................................................................................... 4

1.1 The Owner ............................................................................................................................... 4
1.2 Purpose .................................................................................................................................... 4
1.3 Definitions ................................................................................................................................. 4

2. INSTRUCTIONS TO PROPONENTS ....................................................................................... 5

2.1 Proposal Form and Content ..................................................................................................... 5
2.2 Proposal Language .................................................................................................................. 5

3. SUBMISSION INSTRUCTIONS ................................................................................................. 5

3.1 Proposal Labeling ..................................................................................................................... 5
3.2 Submission Location/Method ................................................................................................... 5
3.3 RFP Closing .............................................................................................................................. 6
3.4 Late Proposals ......................................................................................................................... 6
3.5 Amendments to Proposals ...................................................................................................... 6
3.6 Withdrawal of a Proposal ........................................................................................................ 6
3.7 No Fax Proposals ..................................................................................................................... 6
3.8 No Public Opening ................................................................................................................... 6
3.9 Enquiries .................................................................................................................................. 6
3.10 Discrepancies or Omissions .................................................................................................... 7
3.11 Questions and Addenda .......................................................................................................... 7
3.12 Examination of Contract Documents .................................................................................... 7

4. PROPOSAL SUBMISSION FORM AND CONTENTS ................................................................. 7

4.1 Form of Proposal ..................................................................................................................... 7
4.2 Signature .................................................................................................................................. 7

5. EVALUATION AND SELECTION ............................................................................................. 7

5.1 Evaluation Process ................................................................................................................... 7
5.2 Evaluation Committee .............................................................................................................. 8
5.3 Evaluation Criteria .................................................................................................................. 8
5.4 Reference Checks .................................................................................................................... 9
5.5 Clarifications and Additional Information ............................................................................... 9
5.6 Interviews, Samples and Demonstrations ............................................................................... 9
5.7 Evaluation Criteria and Ranking of Proponents ..................................................................... 9

6. RIGHTS OF THE CITY ............................................................................................................... 9

6.1 Privilege of the City ................................................................................................................ 9
6.2 Discretion of the City .............................................................................................................. 9
6.3 Rejection of all Proposals ....................................................................................................... 10

7. SELECTION AND AWARD ........................................................................................................ 10

7.1 Negotiation of Contract and Award ...................................................................................... 10
7.2 Award ...................................................................................................................................... 10
7.3 Public Notice of Award .......................................................................................................... 11
8. GENERAL CONDITIONS .......................................................................................................... 11

8.1 No Obligation to Proceed ........................................................................................................ 11
8.2 Proponents’ Representation .................................................................................................... 11
8.3 Proponents’ Release and Waiver of Claims ........................................................................ 11
8.4 No City Representation or Warranty ...................................................................................... 12
8.5 Conflict of Interest .................................................................................................................. 12
8.6 No Lobbying ............................................................................................................................. 12
8.7 No Collusion ............................................................................................................................ 12
8.8 Freedom of Information and Protection of Privacy Act .......................................................... 12
8.9 Ownership of Proposals ......................................................................................................... 13
8.10 Indemnification ...................................................................................................................... 13
8.11 Governing Law ....................................................................................................................... 13

9. PURCHASING OPPORTUNITIES ............................................................................................... 13

9.1 Co-Operative Purchasing ....................................................................................................... 13

SCHEDULE A – SCOPE OF SERVICES ...................................................................................... 14
SCHEDULE B – DRAFT AGREEMENT – ...................................................................................... 18
SCHEDULE C – FORM OF PROPOSAL ......................................................................................... 19
   SCHEDULE C-1 – QUESTIONNAIRE ....................................................................................... 21
   SCHEDULE C-2 – FINANCIAL PROPOSAL ............................................................................... 25
INSTRUCTIONS TO PROPONENTS

1.0 INTRODUCTION

1.1 The Owner

The Corporation of the City of Port Coquitlam is hereafter referred to as the “City”. For more general information on the City visit www.portcoquitlam.ca

1.2 Purpose

It is the intent of the City to use this RFP process to select a single qualified provider for the provision of the goods and/or services as described herein.

The City requests proposals from qualified, experienced benefit consulting and/or brokerage firms for the provision of Benefit Administration services for its employees. The successful proponent will act as an intermediary between the City and its benefit carriers.

The City seeks to negotiate with a Proponent and enter into an Agreement for the provision of Benefit Administration services generally in the form of a contract as referred to in Schedule “B” ‘Draft Agreement’. A sample of this contract can be viewed at the City of Port Coquitlam website Purchasing page as seen at; https://www.portcoquitlam.ca/wp-content/uploads/2019/06/GSA-Business-Consulting-and-Professional-Services-Master-For-Website-June-20-2019-vs.pdf

1.3 Definitions

In this RFP the following definitions shall apply:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Agreement”</td>
<td>means the written agreement generally in the form of contract as referred to as Schedule “B” ‘Draft Agreement’, resulting from the RFP executed by the City and a successful Proponent arising out of this RFP;</td>
</tr>
<tr>
<td>“City”</td>
<td>means the Corporation of the City of Port Coquitlam.</td>
</tr>
<tr>
<td>“Contact”</td>
<td>means the person as indicated on the title page of this RFP.</td>
</tr>
<tr>
<td>“Contract”</td>
<td>has the same meaning as Agreement.</td>
</tr>
<tr>
<td>“Contractor”</td>
<td>the company/person that is hired to provide the Goods or Services.</td>
</tr>
<tr>
<td>“Evaluation Committee”</td>
<td>means the committee selected by the City.</td>
</tr>
<tr>
<td>“Evaluation Criteria”</td>
<td>means the criteria used by the Evaluation Committee to evaluate Proposals;</td>
</tr>
<tr>
<td>“Goods”</td>
<td>has the meaning set out in Schedule A.</td>
</tr>
<tr>
<td>“Preferred Proponent(s)”</td>
<td>means the Proponent(s) selected by the Evaluation Committee to enter into negotiations for a Contract.</td>
</tr>
<tr>
<td>“Proponent”</td>
<td>means an entity that submits a Proposal.</td>
</tr>
<tr>
<td>“Proposal”</td>
<td>means a proposal submitted in response to this RFP.</td>
</tr>
<tr>
<td>“Purchase Order”</td>
<td>has the same meaning as Agreement.</td>
</tr>
<tr>
<td>“Respondent”</td>
<td>has the same meaning as Proponent.</td>
</tr>
<tr>
<td>“RFP”</td>
<td>means this Request for Proposals</td>
</tr>
<tr>
<td>“Services”</td>
<td>has the meaning set out in Schedule A.</td>
</tr>
</tbody>
</table>
2. INSTRUCTIONS TO PROPONENTS

2.1 Proposal Form and Content

Proposals shall be submitted substantially in the form and include the content described in the Proposal Form attached as Schedule “C”.

A detailed, clear and concise response from Respondents is required in order to facilitate the evaluation process. “Yes” or “No” responses will not be acceptable unless the City has requested only a “Yes” or “No” response to the specific item. Any requirement with no response will be presumed to mean it is either not included or not available.

2.2 Proposal Language

The Proposal must be in English.

3. SUBMISSION INSTRUCTIONS

3.1 Proposal Labeling

Email submission method –

Electronic file names should include the following details:

i. RFP number,

ii. Name of the Proponent; and

iii. Total number of files included with the Proposal (i.e. 1 of 6, 2 of 6, 3 of 6 etc.).

Number of Copies of Proposal

Email submission – only one (1) copy

The City reserves the right to make additional copies of Respondents Proposals for the purposes of reviewing.

3.2 Submission Location/Method

Proposals must be submitted by email:

1) Submission by email

Email at: purchasing@portcoquitlam.ca

i. The Proponent should submit the Proposal substantially in the form and include the content described in the Proposal Form attached as Schedule “C”. PDF emailed Proposals are preferred, and the City will confirm receipt of emails (not the contents).

ii. The maximum file size the City can receive is 10 (ten) megabytes (MB). If sending large or unusual email attachments, Proponents should phone to confirm receipt. Respondents should reference the RFP # in their email subject line.

iii. Proponents submitting Proposals via email are accepting the associated risks, including but not limited to the risk that a submission arrives late or does not arrive at all.

It is the sole responsibility of the Proponent to satisfy all delivery and timing requirements.
3.3 RFP Closing

Is the date, day and time noted on the Title Page of this RFP or otherwise amended by the City in an Addendum.

Proponents shall deliver their Proposals via email, as noted in the Title Page section of this RFP, no later than the RFP Closing.

The City may, in its sole and absolute discretion, may extend the time for the submission of Proposals for any reason, in which event the City shall issue an addendum to this RFP identifying the new date and time for the RFP Closing on the BC Bid website [www.bcbid.gov.bc.ca/](http://www.bcbid.gov.bc.ca/) identified on the e-Advertisement page as an “Amendment”.

It is the sole responsibility of the Proponent to satisfy all delivery and timing requirements.

3.4 Late Proposals

Proposals received after the RFP Closing will not be considered and will be returned unopened to the submitter.

3.5 Amendments to Proposals

Proposals may be revised by written amendment, delivered to the location set out on the front page, at any time up to, but not later than, the RFP Closing. An amendment should be signed by the same individual that signed the original submission or authorized signatory. The amendment should indicate the change(s) only and is not a full resubmission.

3.6 Withdrawal of a Proposal

Withdrawals can be made at any time up to, but not later than, the RFP closing as follows;

Email Withdrawal submissions may be made by notifying the contract person as noted on the Title Page of this RFP by email. The withdrawal notice must be signed or provided by the same individual that signed the original submission or authorized signatory.

3.7 No Fax Proposals

Proposals, including amendments to Proposals, received by facsimile will not be considered by the City.

3.8 No Public Opening

There will be no public opening of Proposals.

3.9 Enquiries

All enquiries or requests for an explanation or clarification regarding this RFP should be made in writing only by email to the Contact person named on the title page of this RFP. The email should reference the RFP number and title of this RFP in the subject line of the email. Information obtained from any person or source other than the Contact Person identified on the title page of this RFP, may not be relied upon.

Enquiries should be made no later than five (5) business days prior to the RFP Closing. The City reserves the right not to respond to enquiries made within five (5) working days of the RFP Closing Date. Enquiries and responses will be recorded and may be distributed by addendum to this RFP to all Proponents at the City’s sole and absolute discretion.
Any oral explanation, interpretation, information or clarification that may be communicated to a Proponent by the City elected officials or City employees of the City should not be relied upon by any Proponent and shall not bind the City in this RFP.

All enquiries related to the status of this RFP, including whether or not an Agreement has been awarded, should be directed to the Contact Person identified on the front page of this RFP.

3.10 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the RFP or Agreement, or having doubts as to the meaning or intent of any provision, should immediately notify the Contact Person identified on the title page of this RFP. If the City determines that an amendment is required to this RFP, the City’s Contact Person as identified on the title page of the RFP will issue an addendum in accordance with the front page of this RFP. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.

3.11 Questions and Addenda

The City may, in its sole discretion, but is not required to, provide a response to a question or request for an explanation or clarification by a prospective Proponent or Proponent. Any such response (including additional information) will be provided in the form of an Addendum to be posted on BC Bid www.bcbid.gov.bc.ca/, identified on the e-Advertisement page as an “Amendment”, which will then form part of the RFP Documents.

3.12 Examination of Contract Documents

Proponents will be deemed to have carefully examined the RFP, including all attached Schedules, and the Site (as applicable) prior to preparing and submitting a Proposal with respect to any and all facts which may influence a Proposal.

4. PROPOSAL SUBMISSION FORM AND CONTENTS

4.1 Form of Proposal

Proponents should complete the Form of Proposal attached as Schedule “C”; including, but not limited to:

C-1 – Questionnaire
C-2 – Financial Proposal

Proponents are encouraged to the use the forms provided and attach additional pages as necessary.

4.2 Signature

Proposals should be signed by a person authorized to sign on behalf of the Proponent and bind the Proponent to statements made in the Proposal.

5. EVALUATION AND SELECTION

5.1 Evaluation Process

All Proposals received not later than the RFP Closing, in response to this RFP, are subject to review and evaluation by or on behalf of the City.
5.2 Evaluation Committee

The evaluation of Proposals will be undertaken confidentially on behalf of the City by the Evaluation Committee (hereafter defined as the “Evaluation Committee”). The Evaluation Committee may be assisted by other persons as the Evaluation Committee, in its sole discretion, may determine, including technical, financial, legal and other advisors to, or employees of the City.

5.3 Evaluation Criteria

The Evaluation Committee may evaluate a Proposal having regard to the evaluation criteria set out below to determine which Proposal provides, in the opinion of the Evaluation Committee, the best overall value to the City (hereafter defined as the “Evaluation Criteria”).

<table>
<thead>
<tr>
<th>Weighted Criteria</th>
<th>Weight</th>
<th>Minimum Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Experience, Reputation, Resources and Qualifications</td>
<td>25</td>
<td>15</td>
</tr>
<tr>
<td>b) Approach and Methodology</td>
<td>40</td>
<td>24</td>
</tr>
<tr>
<td>c) Value Add</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>d) Financial Proposal</td>
<td>30</td>
<td>18</td>
</tr>
</tbody>
</table>

**TOTAL** | **100** | **57**

Proponents that do not meet a minimum score within a weighted criterion may not be evaluated further.

The points awarded for an Evaluation Criteria shall be a calculation of the Evaluation Committee member’s score, from ‘0’ to ‘4’ or fraction thereof, divided by the maximum score possible (4) and then multiplied by the relevant weighting factor assigned to each Evaluation Criteria.

When evaluating the proposals, the Evaluators will mark using the following legend:

<table>
<thead>
<tr>
<th>SCORE</th>
<th>RELEVANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass/Fail</td>
<td>Mandatory requirements – proponents must clearly demonstrate that they meet the mandatory requirements set out in this document.</td>
</tr>
<tr>
<td>0</td>
<td>no answer or none of the requirements/expectations met</td>
</tr>
<tr>
<td>1</td>
<td>unsatisfactory or few of the requirements/expectations met</td>
</tr>
<tr>
<td>2</td>
<td>satisfactory or minimum requirements/expectations met</td>
</tr>
<tr>
<td>3</td>
<td>good or requirements/expectations exceeded</td>
</tr>
<tr>
<td>4</td>
<td>excellent or far exceeds requirements/expectation</td>
</tr>
</tbody>
</table>

The sum of the total points awarded for all criteria in one proposal, will be compared to the sum total points achieved by the other proposals. This comparison will produce a ranking order of the Proponent and its Proposal relative to all other proposals evaluated. The higher the total points awarded, the higher the ranking of the Proponent in terms of the City’s preference for accepting a Proposal as submitted or entering into negotiations with the Proponent and, subject to agreement of terms of a Contract, awarding the Contract.

The Evaluation Committee will not be limited to the criteria referred to above, and the Evaluation Committee may consider other criteria that the Committee identifies as relevant during the evaluation process. The Evaluation Committee may apply the evaluation criteria on a comparative basis. All criteria considered will be applied evenly and fairly to all Proposals.
5.4 Reference Checks

To assist in the evaluation of the Proposals, the Evaluation Committee may, in its sole and absolute discretion, but is not required to, conduct reference checks with any or all of the references stated in a Proposal, and conduct any background investigations that it considers desirable to seek to verify information provided by, or relating to, a Proponent, whether contained in the Proposal or not, and the Evaluation Committee may consider and rely on any relevant information it considers in its sole and unfettered discretion incidental or relating to the Evaluation Criteria whether obtained from a Proponent’s references or background investigations, or otherwise. By submitting a Proposal, the Proponent authorizes and agrees to the release of information by references to the Evaluation Committee and those persons assisting the Evaluation Committee in respect of this RFP.

5.5 Clarifications and Additional Information

To assist in the evaluation of the Proposals, the Evaluation Committee may, in its sole and absolute discretion, but is not required to, request clarifications or additional information from some or all Proponents about a Proposal, and matters incidental and relating to the Evaluation Criteria, and may consider and rely on such information in an evaluation of a Proposal.

5.6 Interviews, Samples and Demonstrations

To assist in the evaluation of the Proposals, the Evaluation Committee may, in its sole and absolute discretion, but is not required to, request an interview and/or sample and/or demonstration, from some or all Proponents to the Evaluation Committee and those assisting the Evaluation Committee and may consider and rely on any clarification or supplementary information received from the interview and/or sample and/or demonstration in the evaluation of Proposals. The City is not required to give any Proponent an opportunity to make an interview and/or sample and/or demonstration or provide any clarification or supplementary information.

Samples, if so requested, are to be provided at no cost to the City and if not destroyed in testing or review, the Proponent may request the samples be returned at their expense. The Evaluation Committee may consider and rely on any review of samples provided in the evaluation of Proposals.

5.7 Evaluation Criteria and Ranking of Proponents

Upon the evaluation of a Proposal, supplementary information and information obtained from References, Interviews, Demonstrations, and Samples, the Evaluation Committee may adjust points to the Proponent based upon the application of the Evaluation Criteria seen in 5.3 in order to score and rank the Proponents from highest to lowest in preference.

6. RIGHTS OF THE CITY

6.1 Privilege of the City

The City may reject any or all Proposals and may enter into a Contract with a Proponent whose Proposal is not the lowest in overall cost to the City.

6.2 Discretion of the City

Notwithstanding any other terms and conditions herein and, without restriction, any legal duties or obligations that may be owed by the City to a Proponent arising out of the submission of a Proposal, the City may, but shall not be required to:

a) waive informalities, irregularities, qualifications, additions, omissions, conditions or other deficiencies in a Proposal, and without limitation, any failure by a Proponent to comply with the requirements of the RFP Documents including those relating to the process for submission of a Proposal (individually and
collectively “Deficiencies”), enter into negotiations with a Proponent and award a Contract for services, on terms different than those contained in the Proponent’s Proposal to a Proponent whose Proposal contains one or more Deficiencies regardless of whether or not the Deficiency or Deficiencies, taken individually, or collectively, are material or substantial such that they would otherwise render the Proposal non-compliant and incapable of lawful acceptance; and

b) reject or decline to proceed with a full evaluation of, a Proposal and decline to enter into negotiations with a Proponent whose Proposal fails to satisfy the Evaluation Committee as to the Proponent’s qualifications, capacity, experience, resources, and expertise for the proper performance of the Services.

c) enter into separate contracts with two Proponents for the provision of some or all of the Supplies.

The City may, in its sole discretion, waive any and all defects in a Proposal and may, in its sole discretion, reject or retain for its consideration Proposals which are materially non-compliant with the terms and the requirements of the RFP Documents, and without restricting the generality of the foregoing, Proposals which are irregular, incomplete, contain qualifications, are conditional or which do not contain the content of, or are not in the form required by, or fail to comply with the process for submission set out in the RFP Documents.

6.3 Rejection of all Proposals

In the event that the City declines to consider or otherwise rejects all Proposals, it may, in its absolute discretion, issue a new request for proposals on the same or different terms as contained in the RFP Documents.

7. SELECTION AND AWARD

7.1 Negotiation of Contract and Award

The selection of a Preferred Proponent or Preferred Proponents may lead to either an Agreement or negotiations that may lead to an Agreement. For the purpose of negotiations that may lead to an Agreement, they will proceed in the following manner.

(a) The Evaluation Committee will complete its evaluation of Proposals. Each Proposal will be ranked according to the points assessed in the evaluation process with the highest ranked Proposal being that with the highest point score.

(b) The City may enter into negotiations with the highest ranked Proponent to finalize the terms of the Contract. If negotiations do not lead to a Contract with that Proponent and the City, then the City may, at its sole and absolute discretion, negotiate with the next highest ranked Proponent and so on, until either the award of the Contract or choose to terminate the RFP.

The City is under no obligation to enter into negotiations with any one or more Proponents. In the case of all negotiations permitted in this RFP, the City retains the sole discretion to determine the duration and timing of any negotiations and reserves the right to enter into a Contract for some or all of the Goods or Services on terms substantially different than those contained in a Proposal and substantially different than those contained in the form set out in Schedule “B” - Draft Agreement.

7.2 Award

Where an agreement in principle has been reached as a result of the steps noted in section 7.1 the City will prepare a General Supply Agreement for execution by the party’s containing the mutually acceptable terms of agreement.
Upon fully executing an Agreement the City will provide in writing a notice of Award along with a copy of the executed contract for the Proponents records.

### 7.3 Public Notice of Award

In keeping with the City’s commitment to a process of openness and transparency, details of the notice of the Award may be posted publicly, including the name of the Awarded Contractor as well as the contract value.

If and when the City provides public notice of an Award it will be posted on the BC Bid web-site at [www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca)

Any objections to a public notice need to be communicated to the City prior to final contract execution.

### 8. GENERAL CONDITIONS

#### 8.1 No Obligation to Proceed

Notwithstanding anything in the RFP Documents, this RFP does not commit the City in any way to proceed to select a Proposal or award any contract to a Proponent and the City specifically reserves the right at any time, whether before or after the RFP Closing, to terminate the RFP.

#### 8.2 Proponents’ Representation

Each Proponent, by submitting a Proposal, represents that it has read and fully understood the terms and requirements of the RFP Documents.

#### 8.3 Proponents’ Release and Waiver of Claims

Each Proponent, by submitting a Proposal, agrees that in no event will the City or any of its employees, advisors, agents or representatives be liable, under any circumstances, for any claim or claims by a Proponent, or liable to reimburse or compensate the Proponent in any manner whatsoever, including but not limited to the costs of preparation of a Proposal, cost of participation in the process described in this RFP, loss of anticipated profits, loss of opportunity for any other matter. Without limiting the foregoing, the Proponent specifically agrees that it will have absolutely no claim for damages, losses, expenses or relief of any kind whatsoever and however arising against the City or any of its employees, elected officials, advisors, agents or representatives or members of the Evaluation Committee whether arising directly or indirectly as a result of the breach by the City, or any of its employees, elected officials, agents, consultants or the Evaluation Committee of any duty in law or in equity and, without limitation, a duty of fairness or good faith, any express or implied contractual duty or any equitable duty owed by the City, its employees, advisors, agents or consultants to a Proponent in relation to this RFP, and without limiting the foregoing, arising in circumstances in which the City:

(a) Fails or refuses to evaluate a Proposal or a part of a Proposal;

(b) Does not apply properly, or at all, any or all evaluation criteria;

(c) Does not select a Proposal or a part of a Proposal for negotiations or award of a General Supply Contract;

(d) Does not enter into negotiations or enter into an agreement or agreements with a Proponent or Proponents;

(e) Suspends, cancels or in any way modifies the RFP or the RFP Documents;
(f) Accepts a non-compliant Proposal; or

(g) Awards a Supply Contract on terms different than those set out in Schedule “B” – Draft Agreement or on terms different than those in the Proposal of a successful Proponent or Proponents.

8.4 No City Representation or Warranty

By submitting a Proposal, a Proponent acknowledges and agrees that the City makes no representation or warranty regarding the correctness, sufficiency or representativeness of any information furnished or made available to the Proponent, including without limitation, information relating to the current conditions affecting, or which could affect, the provision of goods or services, and that the City shall not be responsible for any interpretation, conclusion or deduction made or drawn by a Proponent from any information furnished or made available by the City to the Proponent.

8.5 Conflict of Interest

The City may, in its sole and absolute discretion, disqualify any Proposal if the Proponent has, in the opinion of the City, an actual conflict of interest or unfair advantage or has a relationship that has the potential for a conflict of interest to occur.

Each Proponent, and in the case of a partnership each partner, must fully disclose all relationships they, including its officers, directors and employees, have or have had with any employees, elected officials or Representatives of the City which creates or has the potential to create a real or perceived conflict of interest with the City or provide an unfair advantage to the Proponent by written notice to the City after becoming aware of any such relationship.

If the Proponent does disclose a relationship or declare a conflict of interest, or if the City becomes aware of a relationship which it reasonably determines creates or has the potential to create a real or perceived conflict of interest, the City may direct the Proponent to resolve the conflict to the satisfaction of the City.

8.6 No Lobbying

Subject to communications and dealings with the City Contact Person and the Evaluation Committee as expressly provided for in this RFP, Proponents must not communicate directly or indirectly with any employee or representative of the City, including the Evaluation Committee and any elected officials of the City or the Province of British Columbia about this RFP other than as expressly directed or permitted by the City.

8.7 No Collusion

Each Proponent, by submitting a Proposal, represents and warrants that its Proposal has been prepared without collusion with any other Proponent, and in particular the elements of its Proposal have been arrived at independently of and without discussion with any other Proponent, and the Proponents will refrain from any such collusion or discussion during the entirety of this RFP process.

8.8 Freedom of Information and Protection of Privacy Act

The City is subject to the British Columbia Freedom of Information and Protection of Privacy Act and associated Regulations (collectively, “FOIPPA”), a copy of which is available for review at http://www2.gov.bc.ca/gov/content/governments/about-the-bc-government/open-government/open-information/freedom-of-information
8.9 Ownership of Proposals

All Proposals, including any documents submitted to the City by a Proponent in accordance with the requirements of the RFP Documents, shall become the property of the City and will not be returned to the Proponents. Documents and information received by the City will be held in confidence by the City, subject to the provisions of FOIPPA and other legal or regulatory requirements, subject to its disclosure and use for purposes relating to this Request for Proposals and competitive procurement process.

8.10 Indemnification

Each Proponent will indemnify and save harmless the City, and their respective officers, directors, consultants, employees and agents (the “Indemnified Parties”), from and against any and all losses, claims, damages, actions, causes of action, costs and expenses that the City and, or alternatively, may sustain, incur, suffer or be put at any time either before or after the acceptance, expiration or rejection of this Proposal, arising out of or in any way connected with, directly or indirectly, an act or omission of the Proponent or any of its agents, employees, officers, directors or subcontractors except to the proportionate extent that such losses, claims, damages, actions, causes of action, costs and expenses were caused by the Indemnified Parties, or any of them.

8.11 Governing Law

The laws of the Province of British Columbia shall govern any and all disputes concerning the interpretation, application or implementation of this RFP and any resulting Contract which may be awarded by the City.

9. PURCHASING OPPORTUNITIES

9.1 Co-Operative Purchasing

The Vancouver Regional Co-operative Purchasing Group (the “VRCPG Co-op”) is a group of local government entities around the lower mainland, who from time to time combine their like requirements in a co-operative procurement. Members of the VRCPG Co-op or other public entities may wish to purchase similar Goods and Services from a successful Proponent. Contractors should identify in the Proposal if they are willing to extend their offering to other public entities (under a separate agreement)

END OF RFP INSTRUCTIONS
SCHEDULE A – SCOPE OF SERVICES

1) The City currently has a self-funded, administrative services only model in providing its employees with extended health and dental care benefits. Extended Health Care claims in excess of ten thousand dollars ($10,000) are insured under ‘Stop Loss’ provision. The Basic Life, Dependent Life, Long Term Disability insurances are underwritten on a pooled basis with partial experience rating whereas Accidental Death & Dismemberment is fully pooled.

2) The Contractor will be required to:
   1. Provide advice, consulting expertise, budget forecast and participate in negotiation with benefit carriers for best value
   2. Provide consistent and seamless service to city employees regardless of changes to benefit carriers during life of the contract
   3. Ensure no loss in existing coverage should there be a change in benefit insurers
   4. Monitor ongoing contracts to ensure compliance
   5. Ensure compliance with benefit provisions established with employee groups, collective agreements, and employment contracts
   6. Administer negotiation of renewal proposals
   7. Report on annual plan performance (renewal date is January 1)
   8. Provide quarterly reports or on an ad hoc basis of benefit utilization and cost
   9. Identify factors driving increases in costs and recommendation of opportunities to reduce cost.
   10. Conduct market analysis to determine potential cost drivers, efficiencies and enhancements
   11. Resolve escalated claims issues and/or other benefit issues
   12. Produce employee benefit communications, training, and related material
   13. Ensure best values are achieved through competition, analyzing proposals and selecting successful proponents
   14. Assist in the seamless transfer of existing contracts, coverage and employee communication if a change of benefit carriers is required,
   15. Assist with benefit pricing related to collective bargaining negotiation
   16. Meet with City representatives as required

3) The City currently provides benefits to over 300 of its employees including CUPE, IAFF, Exempt, and elected officials. Within these groups, there are multiple employment statuses (e.g. Full-Time, Part-Time) and benefit packages.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extended Health</td>
<td>296</td>
</tr>
<tr>
<td>Dental</td>
<td>301</td>
</tr>
<tr>
<td>Short Term Disability</td>
<td>168</td>
</tr>
<tr>
<td>LTD</td>
<td>117</td>
</tr>
<tr>
<td>Group Life</td>
<td>311</td>
</tr>
<tr>
<td>AD&amp;D</td>
<td>223</td>
</tr>
<tr>
<td>Dependent Life</td>
<td>188</td>
</tr>
<tr>
<td>Optional Life</td>
<td>36</td>
</tr>
<tr>
<td>Critical Life Insurance</td>
<td>3</td>
</tr>
</tbody>
</table>
The City has the following current benefit provisions for its staff:

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extended Health</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pacific Blue Cross</td>
<td>$125/family</td>
<td>$100/family</td>
<td>$125/family</td>
<td>$25/family</td>
</tr>
<tr>
<td><strong>Deductible</strong></td>
<td>80% In-Prov. 80% Out of Prov. non-emergency</td>
<td>80% In-Prov. 80% Out of Prov. non-emergency</td>
<td>80% In-Prov. 80% Out of Prov. non-emergency</td>
<td>80% In-Prov. 80% Out of Prov. non-emergency</td>
</tr>
<tr>
<td><strong>Reimbursement %</strong></td>
<td>100% Out of Prov. emergency</td>
<td>100% Out of Prov. emergency</td>
<td>100% Out of Prov. emergency</td>
<td>100% Out of Prov. emergency</td>
</tr>
<tr>
<td><strong>Vision</strong></td>
<td>$500/24 months</td>
<td>$300/2 calendar years</td>
<td>$500/24 months</td>
<td>$350/2 calendar years</td>
</tr>
<tr>
<td><strong>Chiropractor/</strong></td>
<td>$550</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acupuncturist</td>
<td></td>
<td>$550</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Physiotherapist/</strong></td>
<td>$1,250</td>
<td></td>
<td></td>
<td>$400</td>
</tr>
<tr>
<td>Massage Therapist</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Podiatrist</strong></td>
<td>$250</td>
<td></td>
<td></td>
<td>$250</td>
</tr>
<tr>
<td><strong>Clinical Psychologist/Clinical Counselors</strong></td>
<td>$700</td>
<td>$600 (excluding clinical counselor)</td>
<td>$700</td>
<td>$300 (excluding clinical counselors)</td>
</tr>
<tr>
<td><strong>Speech Therapist</strong></td>
<td>$200</td>
<td>$200</td>
<td>$200</td>
<td>$200</td>
</tr>
<tr>
<td><strong>Naturopath</strong></td>
<td>$550</td>
<td></td>
<td></td>
<td>$350</td>
</tr>
<tr>
<td><strong>Chiropractor/Naturopath</strong></td>
<td></td>
<td></td>
<td></td>
<td>$350</td>
</tr>
<tr>
<td><strong>Acupuncturist</strong></td>
<td></td>
<td></td>
<td></td>
<td>$200</td>
</tr>
<tr>
<td><strong>Chiropractor/Naturopath/Physiotherapist/Massage Therapist/Podiatrist</strong></td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
</tr>
<tr>
<td><strong>Hearing Aids</strong></td>
<td>$1,000/adult/60mth $1,100/child/60mth</td>
<td>$500/person/5 calendar years</td>
<td>$1,000/adult/60mth $1,100/child/60mth</td>
<td>$700/person/5 calendar years</td>
</tr>
<tr>
<td><strong>Orthopedic Shoes/Orthotics</strong></td>
<td>$500/adult $300/child</td>
<td>$500/adult $300/child</td>
<td>$500/adult $300/child</td>
<td>$500/adult $300/child</td>
</tr>
</tbody>
</table>
### Dental

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deductible</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Plan A – Basic</td>
<td>90%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Plan B – Major Restorative</td>
<td>50%</td>
<td>75%</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>Plan C – Orthodontics</td>
<td>50%</td>
<td>60%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

### Group Life Insurance – SSQ, Life Insurance Company

<table>
<thead>
<tr>
<th>Group Life Insurance</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Amount</td>
<td>1.5x annual earnings</td>
<td>2x annual earnings</td>
<td>2.5x annual earnings</td>
<td>2x annual earnings</td>
</tr>
<tr>
<td>Maximum</td>
<td>$100,000</td>
<td>$250,000</td>
<td>$300,000</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

### Accidental Death & Dismemberment

<table>
<thead>
<tr>
<th>Industrial Alliance</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Amount</td>
<td>1.5x annual earnings</td>
<td></td>
<td>2.5x annual earnings</td>
<td>2x annual earnings</td>
</tr>
<tr>
<td>Maximum</td>
<td>$100,000</td>
<td></td>
<td>$300,000</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

### Dependent Life Insurance

<table>
<thead>
<tr>
<th>SSQ, Life Insurance Company</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse</td>
<td>$1,000</td>
<td></td>
<td>$5,000</td>
<td></td>
</tr>
<tr>
<td>Each Child</td>
<td>$500</td>
<td></td>
<td>$2,500</td>
<td></td>
</tr>
</tbody>
</table>

### Short Term Disability

<table>
<thead>
<tr>
<th>SSQ, Life Insurance Company</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Amount</td>
<td>66.67% weekly salary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum</td>
<td>$1,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elimination Period</td>
<td>9 days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefit Period</td>
<td>19 weeks</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Long Term Disability

<table>
<thead>
<tr>
<th>Company</th>
<th>CUPE – Cost Share (75% Employer/25% Employee-paid)</th>
<th>IAFF (100% Employer-paid)</th>
<th>Exempt/Fire Chief (100% Employer-paid)</th>
<th>Elected Official (75% Employer/25% self-funded)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Amount</td>
<td>67% of monthly salary</td>
<td>67% of monthly salary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum</td>
<td>$7,500/month</td>
<td>$7,500/month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elimination Period</td>
<td>6 months or expiration of sick bank</td>
<td>6 months or expiration of sick bank</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefit Period</td>
<td>Age 60 firefighters Age 65 clerical</td>
<td>Age 65 Exempt Age 60 Fire Chiefs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Optional Life Insurance – The Co-operators

Optional Critical Illness – ACE INA

**END OF SCHEDULE ‘A’**
SCHEDULE B – DRAFT AGREEMENT –

REFER to the attached web link.

Submitted to: Corporation of the City of Port Coquitlam
                       Public Works, Purchasing Division

RFP No.: RFP # 2019-07
RFP Project Title: Benefit Administration

SUBMISSION CHECKLIST AND FORMAT
This section is intended as a checklist for proponents assembling their proposal. Proponents are to provide a response in the format indicated below. If your response requires more space than provided, enclose a supplementary page(s) and reference the page(s) in the space provided. For all enclosures, please indicate the part and section to which they correspond. Proponents are requested to include an electronic version of any printed submission in a pdf file format (on a storage medium, like a flash drive) including all attachments. The electronic copy should contain the identical content. Submission location/method must be according to the instruction found in the “Instructions to Proponents” under Section 3 ‘Submission Instructions’.

Schedule ‘C’ – Form of Proposal ☐
Schedule ‘C1’ – Questionnaire ☐
Schedule ‘C2’ – Financial Proposal ☐

PROPOSENENT INFORMATION
Legal Name of Proponent: ________________________________
Business Address: __________________________________
Phone Number: ______________________________________
Email Address: _______________________________________
Contact Person and Title: _______________________________
Business Website: ___________________________________

Identify Business Structure:
☐ If a Company
Incorporated under the laws of what jurisdiction: ________________________________
Incorporation number: __________________________________________

☐ If a Partnership
Partner Name(s): _________________________________________
Partner Address(es): _________________________________________

☐ If an Individual
Operating Name: _________________________________________
CONFLICT OF INTEREST DISCLOSURE

In this Part, the Proponent must declare that neither it, nor any of its officers, directors, principals or employees, have or have had any relationship with any employees or elected officials of the City which creates or has the potential to create a real or perceived conflict of interest or provide an unfair advantage, except as identified below. Individually, for each such relationship, identify the following:

Name of Party or Individual from the Proponent Involved: ________________________________

Nature of the Relationship: _______________________________________________________

Measures Implemented to Mitigate the Conflict (if any): _______________________________

PROponent DECLARATION AND SIGNATURE

The Proponent declares the information provided in this Proposal is true and accurate. Submission of a Proposal is a representation that the Proponent has obtained a complete copy of the RFP Documents, including any and all Addenda which may be issued.

Authorized Signatory(ies) or Partner(s):___________________________________________

_________________________________________  ________________________________________
Signature       Signature

_________________________________________  ________________________________________
Name and Title  Name and Title

_________________________________________  ________________________________________
Telephone No.   Telephone No.

_________________________________________  ________________________________________
Cell Phone No.   Cell Phone No.

_________________________________________  ________________________________________
Email          Email
SCHEDULE C-1 – QUESTIONNAIRE

Proponents should respond to the questions under each heading clearly and concisely. Responses should be limited to ten (10) pages (not including Appendix).

The tables below are expandable.

Through the information provided in your Proposal, the City of Port Coquitlam expects to gain an in-depth understanding of a Proponent’s experience, capabilities, capacity to provide the Services outlined in Schedule A – ‘Scope of Services’.

The Evaluation Committee will evaluate the Form of Proposal based on the Evaluation Criteria outlined in the “Instructions to Proponents”, under Section 5 ‘Evaluation and Selection’.

EXPERIENCE, REPUTATION, RESOURCES AND QUALIFICATIONS (25%):

Responses will receive higher marks for this section that identifies:
- Current and previous clients in the public sector
- Experience with clients that have multiple collective agreements within an organization

Q1 (15%): Provide an introduction letter, introducing the Proponent, and identifying the company name, corporate history, and general description of the company and customer base.

Describe any features and benefits that may distinguish the Proposal. Provide detailed information regarding any sub Proponent relationships, partnerships, or associations of any kind that have been or will be made regarding this opportunity and/or any future contract extension periods.

A1:

Q2 (no weight): Identify if a third party provider forms a part of the Proponents proposal to administer any part of the administration? Provide the rationale of why or why not.

A2:

Q3 (10%): Describe three (3) specific examples of services performed by the Proponent that are similar to the Services described in this RFP (as described in Schedule A). Identify each contact person who can provide details and feedback regarding the services performed by the Proponent. The City of Port Coquitlam may contact these references.

A3: Reference No. 1
(a) Client name;
(b) Contact person’s name, phone number, and email address;
(c) Scope of services provided;
(d) Years of working with client
<table>
<thead>
<tr>
<th>(e)</th>
<th>Key success factors</th>
</tr>
</thead>
</table>

**A3: Reference No. 2**

(a) Client name;
(b) Contact person’s name, phone number, and email address;
(c) Scope of services provided;
(d) Years of working with client
(e) Key success factors

**A3: Reference No. 3**

(a) Client name;
(b) Contact person’s name, phone number, and email address;
(c) Scope of services provided;
(d) Years of working with client
(e) Key success factors

**APPROACH AND METHODOLOGY (40%):**
*Responses will receive higher marks for this section that identifies:*
- Strategies for benefit cost containment
- Strategies to ensure the City will receive competitive benefits
- Benefit plan administration ease

<table>
<thead>
<tr>
<th>Q4 (2%): How many insured lives are currently under the Proponents direct administration?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A4:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q5 (2%): In the event an insurer change is required during the Contract term, what will the Proponent do to ensure that the City maintains coverage?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A5:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q6 (2%): Describe the Proponent’s approach to disability claims adjudication. What are your safeguards to ensure service for employees on active claims when there is a transfer in insurers?</th>
</tr>
</thead>
<tbody>
<tr>
<td>A6:</td>
</tr>
<tr>
<td>Q7: (2%): Describe the evidence of insurability requirements for basic, optional, critical life insurance</td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td>Q8: (2%): Confirm whether there will be stop loss provision and the threshold amount.</td>
</tr>
<tr>
<td>Q9 (2%): Confirm if billing for all benefits can be consolidated to one electronic (xls or csv file) bill and can be broken down into respective employee groups and confirm method of remittance.</td>
</tr>
<tr>
<td>Q10 (2%): Confirm whether mass changes to benefit levels (e.g. salary changes) may be entered into your systems</td>
</tr>
<tr>
<td>Q11 (2%): Describe how the Proponent will administer contributions for Administrative Service Only benefits.</td>
</tr>
<tr>
<td>Q12 (5%): How does the Proponent identify factors driving increases in cost and provide recommendations for cost containment, efficiencies, and enhancements.</td>
</tr>
<tr>
<td>Q13 (5%): Describe the process in which new enrollments, changes to coverage and terminations of coverage are reflected and updated. Include transition points between employees and benefit carriers and methods of enrollment/updates.</td>
</tr>
<tr>
<td>Q14 (2%): Provide a sample of benefit forms, communication documents, wallet cards, instructions, user website, and administrator website.</td>
</tr>
<tr>
<td>Q15 (5%): Describe the process in which benefit issues from the end user are addressed and escalated. What is the Proponent’s approach to ensuring a high quality end user customer service experience? Include any standard customer service level commitments.</td>
</tr>
<tr>
<td>Q16 (2%): Include samples of Financial forms, invoices, quarterly reporting, annual reporting, and any other applicable documents.</td>
</tr>
</tbody>
</table>
Q17 (5%): How would the Proponent ensure best market value for the cost of insurance during the term of the contract?

A17:

**VALUE ADD (5%):**
*Responses will receive higher marks for this section that identifies:*
  - Added services that would increase service, efficiency, maintain fiscal responsibility

Q18 (5%): Provide a description of any value added services the Proponent can provide that are not identified in this RFP or sets you apart from other similar organizations.

A18:
Responses will receive higher marks for this section that identifies;

- An overall lower cost to the City

FEE PROPOSAL (30%):

1. Proposals should include the fee structure for providing the service including disbursements.

2. Describe your pricing approach whether it be fee for service, commission based, annual fixed cost, percentage of benefit or other.
   Within the fee structure:
   a. Include detailed breakdown of all fees and rates.
   b. Rate per hour showing number of expected hours for each member of the consulting/brokerage team
   c. Indicate whether the fee includes any service level guarantees

Note: All pricing provided should be in Canadian funds and exclusive of Taxes

END OF SCHEDULE ‘C-2’