



Request for Proposals

New Westminster Secondary School Replacement Project

CONFORMED

SUMMARY OF KEY INFORMATION

RFP TITLE	The title of this RFP is: New Westminster Secondary School Replacement Project Proponents should use this title on all correspondence.
CONTACT PERSON	The Contact Person for this RFP is: Catherine Silman Email: catherine.silman@partnershipsbc.ca Please direct all Enquiries, in writing, to the above named Contact Person. No telephone or fax enquiries please.
ENQUIRIES	Proponents are encouraged to submit Enquiries at an early date and: <ul style="list-style-type: none"> ▪ for Enquiries of a technical nature: prior to 15:00 Pacific Time on the day that is 10 Business Days before the Submission Time for Technical Submissions ▪ for Enquiries of a financial nature: prior to 15:00 Pacific Time on the day that is 5 Business Days before the Submission Time for Financial Submissions to permit consideration by the Owner; the Owner may, in its discretion, decide not to respond to any Enquiry.
The following submissions are to be delivered at the times and location indicated below:	
SUBMISSION TIME FOR TECHNICAL SUBMISSIONS	September 25, 2017 at 11:00 Pacific Time
SUBMISSION TIME FOR FINANCIAL SUBMISSIONS	November 1, 2017 at 11:00 Pacific Time
SUBMISSION LOCATION	The Submission Location is: Suite 900 – 1285 West Pender Street Vancouver BC V6E 4B1 Attention: Catherine Silman
DELIVERY HOURS	Deliveries will be accepted at the Submission Location on weekdays (excluding Statutory Holidays) from 08:30 to 16:00 Pacific Time
The following submissions are to be delivered at the times and location indicated below:	
SUBMISSION TIME FOR COLLABORATIVE MEETING 1	May 2, 2017 at 16:00 Pacific Time

SUBMISSION TIME FOR INTERIM SCHEDULE REVIEW SUBMISSION	May 30, 2017 at 16:00 Pacific Time
SUBMISSION TIME FOR COLLABORATIVE MEETING 2	May 30, 2017 at 16:00 Pacific Time
SUBMISSION TIME FOR INTERIM FINANCIAL REVIEW SUBMISSION	August 16, 2017 at 16:00 Pacific Time
SUBMISSION TIME FOR COLLABORATIVE MEETING 3	July 5, 2017 at 16:00 Pacific Time
SUBMISSION TIME FOR COLLABORATIVE MEETING 4	August 16, 2017 at 16:00 Pacific Time
SUBMISSION LOCATION	By email to the Contact Person: catherine.silman@partnershipsbc.ca

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1 INTRODUCTION

1.1 PURPOSE OF THIS RFP

The purpose of this request for proposals (“**RFP**”) is to invite eligible Proponents to prepare and submit Proposals to design and construct a new secondary school in New Westminster, B.C. (the “**Project**”) under a design-build agreement (the “**Design-Build Agreement**”).

1.2 ELIGIBILITY TO PARTICIPATE IN THIS RFP

Through a request for qualifications (“**RFQ**”) issued November 25, 2016 by the Board of Education of School District No. 40 (New Westminster) (“**SD40**” or the “**Owner**”), the following design-builders are qualified to participate in this RFP:

- Clark Builders;
- Graham Design-Builders LP; and
- Stuart Olson Construction Ltd.

Only these three Proponents, subject to changes in Proponent Team membership as permitted by this RFP, may submit Proposals or otherwise participate in this RFP.

2 RFP PROCUREMENT PROCESS

2.1 ESTIMATED TIMELINE

The following is the Owner's estimated timeline for the Project:

Activity	Timeline
Issue RFP and Initial Draft Design-Build Agreement to Proponents	March 31, 2017
Proponent Kick-Off Meeting	April 21, 2017
Submission Time for Collaborative Meeting 1	May 2, 2017
Collaborative Meeting 1	Week of May 8, 2017 (Tuesday – Thursday)
First City of New Westminster Meeting	May 15, 2017
Business-to-Business Networking Meeting	Week of May 15, 2017
Interim Schedule Review Submission	May 30, 2017
Submission Time for Collaborative Meeting 2	May 30, 2017
Collaborative Meeting 2	Week of June 5, 2017 (Tuesday – Thursday)
Submission Time for Collaborative Meeting 3	July 5, 2017
Third Collaborative Meeting	Week of July 10, 2017 (Tuesday – Thursday)
Submission Time for Collaborative Meeting 4	August 16, 2017
Interim Financial Review Submission	August 16, 2017
Fourth Collaborative Meeting	August 21 – 23, 2017 (Monday - Wednesday)
Second City of New Westminster Meeting	August 22, 2017
Issue Final Draft Design-Build Agreement	September 8, 2017
Submission Time for Technical Submissions	September 25, 2017
Invitation to Submit Financial Submission	October 25, 2017
Submission Time for Financial Submissions	November 1, 2017
Selection of Preferred Proponent	November 2017
Public Consultation	November 2017
Contract Execution	December 2017
Design and Construction Commences	December 2017

Activity	Timeline
Target Substantial Completion Date	No later than May 1, 2020
Owner Access for Move-In	May 1, 2020
School Commences Operations in the Facility (school starts)	September 1, 2020

This estimated timeline is subject to change at the discretion of the Owner.

2.2 COLLABORATIVE MEETINGS

The Owner will make available certain of its personnel, consultants and advisors (the “**Owner Representatives**”) to participate in Collaborative Meetings with the Proponents. The Owner expects that Proponents will make available all necessary consultants, including architectural, mechanical, electrical, acoustic, and theatre to attend the Collaborative Meetings. The Owner expects the Collaborative Meetings to take place as follows:

- (a) the purpose of the Collaborative Meetings is to provide a process that will assist the Proponents to develop optimal solutions for the Project while minimizing the risk that a Proponent’s solution is unresponsive to the Owner’s requirements, and in particular:
 - (1) to permit the Proponent’s representatives to provide the Owner Representatives with comments and feedback on material issues such as affordability, schedule, or provisions of the Initial Draft Design-Build Agreement; and
 - (2) to permit a Proponent to discuss with the Owner potential solutions and approaches that the Proponent may be considering for various aspects of its Proposal;
- (b) in advance of each Collaborative Meeting, and no later than the Submission Time for Collaborative Meeting 1, Submission Time for Collaborative Meeting 2, Submission Time for Collaborative Meeting 3, and Submission Time for Collaborative Meeting 4, each Proponent is strongly encouraged to provide the Owner with:
 - (1) a proposed meeting agenda (including any consultants and advisors a Proponent would like in attendance from the Owner Representatives); and
 - (2) a list of prioritized issues the Proponent would like to discuss, and any materials relevant to such issues;

Material not submitted by the Submission Time for Collaborative Meeting 1, Submission Time for Collaborative Meeting 2, Submission Time for Collaborative Meeting 3, and Collaborative Meeting 4 respectively, may not be reviewed by the Owner.

The Owner may provide Proponents with comments on the agenda and a list of any prioritized issues the Owner would like to discuss.

An example of the structure of the Collaborative Meetings, as well as an agenda and suggested submission items are included in Appendix K.

- (c) the Owner will determine which Owner Representatives will be present at any Collaborative Meeting;
- (d) except as may be expressly stated otherwise in this RFP, including Section 10.5, the Owner will retain all information received from a Proponent during a Collaborative Meeting(s) as strictly confidential, and will not disclose such information to the other Proponents or any third party. The Owner may disclose such information to its consultants and advisors who are assisting or advising the Owner with respect the Project.
- (e) at each Collaborative Meeting, a Proponent may have such officers, directors, employees, consultants and agents of the Proponent and the Proponent Team members present as the Proponent considers reasonably necessary for effective communication with the Owner and to fulfil the objectives of the Collaborative Meeting provided that the Owner may, in its discretion, limit the number of participants at any one meeting. Participation in Collaborative Meetings is in person only unless otherwise permitted at the discretion of the Owner;
- (f) to facilitate free and open discussion at the Collaborative Meetings, Proponents should note that any comments provided by or on behalf of the Owner during any Collaborative Meeting, including in respect of any particular matter raised by a Proponent or which is included in any documents or information provided by a Proponent prior to or during the Collaborative Meeting, and any positive or negative views, encouragement or endorsements expressed by or on behalf of the Owner during the Collaborative Meetings to anything said or provided by Proponents, will not in any way bind the Owner and will not be deemed or considered to be an indication of a preference by the Owner even if adopted by the Proponent;
- (g) if for the purposes of the preparation of its Proposal a Proponent wishes to rely upon anything said or indicated at a Collaborative Meeting, then the Proponent must submit an Enquiry describing the information it would like to have confirmed and request that the Owner provide that information to the Proponent in written form and, if such information relates to a clarification, explanation or change to a provision of this RFP or the Design-Build Agreement, request an Addendum to this RFP clarifying and amending the provision in question;
- (h) by participating in the Collaborative Meetings a Proponent confirms its agreement with these procedures and acknowledges that the meetings are an integral part of the procurement process as described in this RFP and are in the interests of all parties;
- (i) the Owner anticipates holding three Collaborative Meetings with each Proponent prior to the Submission Time for Financial Submissions. Following the release of the RFP, the Owner will consult with each Proponent to confirm specific dates for Collaborative Meetings. If the Owner

considers it desirable or necessary to schedule additional or fewer Collaborative Meetings, the Owner may, in its discretion, amend the anticipated schedule;

- (j) for convenience, the Owner may, as part of or in conjunction with, a Collaborative Meeting, invite other persons (e.g., neighbourhood representatives) to meet with Proponents. Proponents are advised that the confidentiality of the Collaborative Meetings is not expected to apply to such other persons;
- (k) Proponents may request that the Owner schedule additional Collaborative Meetings on specific topics by providing the request in writing to the Contact Person with proposed dates and details of the topic or topics to be discussed; and
- (l) it is expected that Collaborative Meetings will be held in New Westminster.

2.3 BUSINESS-TO-BUSINESS NETWORKING SESSION

The Owner intends to coordinate a session with Proponent Teams and local contractors, suppliers and businesses (“**Business-to-Business Networking Session**”) to provide an opportunity for:

- (a) local contractors, suppliers, businesses and potential employees who might be interested in meeting the Proponent Teams; and
- (a) Proponent Teams to enhance their knowledge, understanding and awareness of local goods, services and labour pool, and to build relationships with local contractors, suppliers and businesses.

Proponents should identify any specific products, services, or areas of interest and submit as part of the agenda materials for Collaborative Meeting 1 (see Appendix K).

2.4 COMMENTS ON THE DESIGN-BUILD AGREEMENT

Each Proponent should review the Initial Draft Design-Build Agreement for the purpose of identifying any issues or provisions that the Proponent would like to see clarified or amended. Following such review:

- (a) the Owner will invite Proponents as part of the Collaborative Meeting process to discuss possible clarifications or amendments to the Initial Draft Design-Build Agreement, including with respect to commercial, legal, and design and construction aspects of the Project;
- (b) each Proponent should, by the Submission Time for Collaborative Meeting 1, Submission Time for Collaborative Meeting 2, and Submission Time for Collaborative Meeting 3, provide the Owner with a prioritized list of requested changes, if any, to the Initial Draft Design-Build Agreement using the Proponent Comments Form attached as Appendix E; and

- (c) the Owner will consider all comments and requested clarifications or amendments received from the Proponents as described in Sections (a) and (b) and may respond to some or all of the comments received, and will amend the Initial Draft Design-Build Agreement as the Owner may determine in its discretion.

Prior to the Submission Time for Technical Submissions, the Owner intends to issue by Addendum one or more revised drafts of the Design-Build Agreement, including one that will be identified as the final draft design-build agreement (the “**Final Draft Design-Build Agreement**”). The Owner may further modify the Final Draft Design-Build Agreement by Addendum prior to the Submission Time for Financial Submissions. The Final Draft Design-Build Agreement will be the common basis for the preparation of all Proposals, and Proponents should not in their Proposal make any modifications, changes or additions to the Final Draft Design-Build Agreement except for modifications, changes or additions to the Statement of Requirements as provided for in Section 4.3 or modifications, changes or additions provided for in Section 8.2.

2.5 DATA ROOM

The Owner has established a website to be used as an electronic Data Room in which it has placed documents in the possession of the Owner that the Owner has identified as relevant to the Project, and that may be useful to Proponents. The Owner does not make any representation as to the relevance, accuracy or completeness of any of the information available in the Data Room except as the Owner may advise in writing with respect to a specific document. The Owner will grant Proponents access to the Data Room and will require Proponents to execute an agreement to keep information contained in the Data Room confidential.

The information in the Data Room may be supplemented or updated from time to time. Although the Owner will attempt to notify Proponents of all updates, Proponents are solely responsible for ensuring they check the Data Room frequently for updates and to ensure the information used by the Proponents is the most current, updated information.

2.6 INTERIM FINANCIAL AND SCHEDULE REVIEW SUBMISSION

It is in the interests of the Owner and all Proponents to identify at an early stage of the procurement whether the Project, as defined in this RFP, is affordable within the limits set out in Section 4 and capable of meeting the Owner’s schedule. Accordingly, as part of the Collaborative Meetings, Proponents and the Owner will conduct interim reviews as follows:

- (a) the purpose of the interim financial and schedule reviews is to give early warning of any difficulty in staying within the Design-Build Price Ceiling and/or meeting the required Target Substantial Completion Date, and to permit the Owner and the Proponents to consider and implement steps,

including in the Owner's discretion adjustments to Mandatory Requirements or to Appendix A (Evaluation of Proposals) so that the Competitive Selection Process can proceed with confidence that Proposals will be within the Design-Build Price Ceiling and meet the required Target Substantial Completion Date;

- (b) prior to the Submission Time for Interim Schedule Review Submission, each Proponent should submit to the Owner a schedule from Contract Execution to Substantial Completion. While not prescribing the form of the submission, the Owner is expecting it to be no more than 10 pages in length and to include schedule assumptions in sufficient detail to allow the Owner to understand the Proponent's schedule;
- (c) prior to the Submission Time for Interim Financial Review Submission, each Proponent should submit to the Owner its best estimate of the anticipated nominal cost of its Proposal (the **"Nominal Cost of the Proposal"**) as calculated in accordance with Form A1 of Appendix B. While not prescribing the form of the submission, the Owner is expecting it to be no more than 10 pages in length and to include cost and input assumptions in sufficient detail to allow the Owner to understand the Proponent's cost base (with at least all major cost headings included), and any anticipated cost pressures and possible options to achieve affordability, if applicable;
- (d) the Owner will retain each of the Interim Schedule Review Submission and Interim Financial Review Submission as strictly confidential, and will invite each Proponent, as part of Collaborative Meeting 2, or Collaborative Meeting 3, as applicable, to discuss any aspect of its submissions, including any recommendations for amendment of the Project requirements if a Proponent determines that the Project as described will exceed the Design-Build Price Ceiling, or will not achieve the Owner's schedule objectives, as applicable; and
- (e) unless expressly referred to or included by reference in its Proposal, a Proponent's Interim Schedule Review Submission and Interim Financial Review Submission will not be considered part of its Proposal and the Owner will not consider or evaluate it as to adequacy, quality, content or otherwise.

The Owner understands that the values indicated in a Proponent's Interim Financial Review Submission and Interim Schedule Review Submission are not a commitment and that all aspects could change in the final Proposal.

2.7 PROPONENT'S CONTACT REPRESENTATIVE

The Owner may communicate solely with the Proponent's Contact Representative, and may disregard communications from any other person on behalf of the Owner.

Although the Owner may rely on the Proponent's Contact Representative's authority to bind the Proponent, execution of documents by the Proponent's Contact Representative is not required. The Owner may rely on the authority to bind the Proponent by any person or persons representing the Proponent.

3 KEY PROJECT ELEMENTS

Any description or overview of the Initial Draft Design-Build Agreement or the Final Draft Design-Build Agreement in this RFP is provided for convenience only and does not replace, supersede, supplement or alter the Initial Draft Design-Build Agreement or the Final Draft Design-Build Agreement. If there are any inconsistencies between the terms of the Final Draft Design-Build Agreement and the description or overview of those terms set out in this RFP or the Initial Draft Design-Build Agreement, the terms of the Final Draft Design-Build Agreement will prevail.

3.1 SUMMARY OF PROJECT SCOPE

The Design-Builder will be required to plan, design and build a new replacement school on the site of the New Westminster Secondary School to address the educational, physical, and social needs of 1,900 secondary students. The functional requirements are detailed in the Design-Build Agreement.

3.2 DESIGN-BUILDER

The Design-Builder will be responsible for all aspects of the Project in accordance with the Design-Build Agreement. This includes:

- (a) design and construction of the new Facility, including integration of the various building components with each other;
- (b) provision of utilities and other Site services required to support the Facility;
- (c) provide Substantial Completion and Facility access to the Owner by May 1, 2020, with Owner occupancy of the Facility by September 1, 2020; and
- (d) the Target Substantial Completion Date is required to be no later than May 1, 2020.

3.3 MUNICIPAL APPROVALS

In accordance with the Design-Build Agreement, the Design-Builder will be responsible for obtaining all permits and approvals required for the design and construction of the Facility, and to ensure that its design for the Facility complies with the applicable zoning and related City of New Westminster (the “City”) requirements.

The Owner has initiated preliminary discussions with respect to City requirements for the Project and the Competitive Selection Process as follows:

- (a) off-site servicing and services relocation;
- (b) City engineering department requirements; and

(c) design guidelines.

The Site is zoned P2, which permits the use of the property for public schools as well as off-street parking and loading. The Design-Builder may, at its risk, seek zoning variances or permit modifications for the benefit of its design and Proposal.

Pursuant to the Design-Build Agreement, the Design-Builder will have the responsibility to obtain all permits from the City as required for the Design-Builder's design of the Facility, and to obtain the City's approval for utility connections and other matters.

3.3.1 Communications with the City

Each Proponent will have the opportunity to meet separately and confidentially with City representatives prior to the Submission Time for Technical Submissions to allow Proponents to obtain information they may require for the preparation of Proposals. Proponents will need to provide a detailed agenda with specific discussion topics and questions at least three days before a scheduled meeting with the City. Although the City will endeavour to provide accurate responses to questions to the best of its ability based on the information at hand, the responses are not binding on the City and are on a without prejudice basis. All Proponent meetings with the City will include an Authority representative and will be coordinated through the Contact Person.

The City will not respond directly to questions from Proponents regarding the Project. All such requests for information from the City are to be submitted to the Contact Person through the Enquiry process outlined in Section 6.6.

3.4 PUBLIC CONSULTATION

As part of its ongoing commitment to public consultation, following the selection of Preferred Proponent, the Owner intends to publicly display the Preferred Proponent's design for stakeholder feedback.

The Preferred Proponent will be required to provide the following narratives, together with schematic level drawings and information, including graphics for public display on 24" x 36" panel boards sufficient to demonstrate the intent of the design:

- (a) Site plan(s) showing legal lines, roads, setbacks, landscape, tree retention, adjacencies (Moody Park Arena, Massey Theatre, Mercer Stadium Park, and Thornbridge Gardens senior's residence) as well as, outdoor space, playfields, access, parking, and loading;
- (b) Plans, sections, elevations;
- (c) Exterior and interior 3D Fly-throughs;
- (d) Renderings from the perspective of a pedestrian viewing the new school from each side;

- (e) Materials board for exterior and interior materials selection; and
- (f) Diagrams showing sustainable strategies and building system strategies.

3.5 TECHNICAL REPORTS

The Owner has made available certain reports in the Data Room describing Site conditions (the “**Technical Reports**”) for reference by Proponents.

While not an exhaustive list, the following Technical Reports are available in the Data Room:

- (a) topographical and Site surveys;
- (b) geotechnical;
- (c) archaeological (or heritage);
- (d) environmental; and
- (e) traffic and parking studies.

The investigations and reports outlined in Section 3.5 of this RFP are limited to a factual record and are not warranted by the Owner. If the Design-Builder chooses to rely in any way on the investigations and reports outlined in Section 3.5, the Design-Builder will be deemed to have assumed and accepted all risks that the information as disclosed in the investigation and reports may not accurately or completely describe actual Site conditions, including geotechnical, environmental, archaeological, or soil conditions (including risk of boulders, rock and low strength soil) and ground water conditions (including risk of underground streams or water table conditions). The Owner may consider requests from Proponents to conduct additional investigations on the Site.

3.6 SITE CONSIDERATIONS

By submitting a Proposal, Proponents confirm they understand the existing conditions, critical dimensions and limitations of the Site.

The Site is relatively flat and adjacent to Mercer Stadium Park, Moody Park Arena, Massey Theatre and Thornbridge Gardens seniors’ residences. The existing New Westminster Secondary School will remain operational throughout construction.

Approximately two hectares in the northwest corner of the property were determined to have a high probability of burials and therefore designated as cemetery. A further approximately four hectares are protected under the Heritage Conservation Act and geophysical investigations have been completed to determine the extent of possible burial areas. Both the Government of British Columbia and the New Westminster School District are committed to ensuring that no construction will take place on any known

burial area. All work within the protected areas, including Site servicing, must be monitored by an archaeologist to ensure that heritage requirements are met.

In addition, further geotechnical and geoenvironmental work has been completed to better define existing conditions. The Owner will initiate environmental remediation in order to obtain a Certificate of Compliance (COC) for the Site from the Ministry of Environment.

Upon request, the Owner may arrange tours of the Site with Proponents, either individually or as a group. If, for the purposes of the preparation of its Proposal, a Proponent wishes to rely upon anything said or indicated during a tour of the Site, then the Proponent must submit an Enquiry describing the information it would like to have confirmed and request that the Owner provide that information to the Proponent in written form and, if such information relates to a clarification, explanation or change to a provision of this RFP or the Design-Build Agreement, request an Addendum to this RFP clarifying and amending the provision in question.

3.7 SPACE REQUIREMENTS AND INDICATIVE DESIGN

The Design-Builder will be required to design and build the Facility to accommodate the spaces, activities, functions, design features and adjacencies described in the Design-Build Agreement.

The Indicative Design was prepared to test functionality and was reviewed with the Owner who has provided input on the general layout and adjacencies but does not fully reflect this RFP and Initial Draft Design-Build Agreement as issued. The Indicative Design should not be relied on by Proponents. It is for illustrative and general guidance purposes only and does not relieve the Design-Builder in any way of all responsibility for the design of the Facility. The Indicative Design is not intended to restrict Proponents in their design of the Facility. The Owner is particularly interested in, and encourages, innovative design solutions that improve on the Indicative Design, meet performance specifications, and offer benefits to the Owner. The Indicative Design does not form part of the Design-Build Agreement.

Drawings describing the Indicative Design for the Facility are available in the Data Room.

3.8 EQUIPMENT

The Design-Builder will complete the Facility to accommodate equipment, including all required electrical and plumbing connections, structural support, seismic restraints and space for efficient access, all to the tolerances and specifications as may be specified and required in accordance with the Design-Build Agreement.

An equipment list is provided as an appendix to the Statement of Requirements. The Design-Builder is required to coordinate equipment installation with the building construction schedule while allowing delivery/installation as close to Substantial Completion as possible.

3.9 LEED®/ENERGY

The Design-Builder will be required to obtain LEED® Gold Certification for the new school. The Project has been registered with the Canada Green Building Council to LEED Canada for New Construction and Major Renovations v2009.

3.10 WOOD FIRST

The Design-Builder will comply with the requirements of the Wood First Act (British Columbia).

3.11 APPRENTICES ON PUBLIC PROJECTS IN BRITISH COLUMBIA

Proponents are referred to the “Apprentices on Public Projects in British Columbia Policy and Procedures Guidelines”. The Guidelines address use of registered apprentices and reporting on registered apprentices and trainees.

The Guidelines are available at <http://www2.gov.bc.ca/gov/content/industry/construction-industry/apprentices>.

The Design-Build Agreement includes a requirement for the Design-Builder to comply with the policy, procedure and guidelines.

4 AFFORDABILITY

A key objective of the Competitive Selection Process is to achieve the Project scope while meeting the Project's Design-Build Price Ceiling requirements.

4.1 DESIGN-BUILD PRICE CEILING

The Owner has identified a mandatory Design-Build Price Ceiling of \$76.75 million for the Nominal Cost of the Proposal. Project approvals by the Owner have been based on this Design-Build Price Ceiling.

4.2 NOMINAL COST CALCULATION

Each Proponent should calculate the Nominal Cost of the Proposal and should use the Form A1 - Breakdown of Contract Price, provided by the Owner. The completed Breakdown of Contract Price and the Nominal Cost of the Proposal calculation should be submitted with the Proponent's Proposal. This Nominal Cost of the Proposal will be compared to the Design-Build Price Ceiling for evaluation purposes as described in Appendix A of this RFP.

The Breakdown of Contract Price is available in the Data Room as "Form A1 – Breakdown of Contract Price.xls".

4.3 SCOPE LADDER

If not all of the elements of the Statement of Requirements are achievable within the Design-Build Price Ceiling, a Proponent may propose to reduce the scope of the Project by one or more of the scope items set out in an approved list (the "**Scope Ladder**"). The Scope Ladder includes items in four tiers. Proponents proposing reductions to the scope of the Project should limit their proposed reductions to items identified by the Owner in the Scope Ladder, and reductions should only be made in the following order:

- (a) tier 1 changes (items within tier 1 may be used in any order);
- (b) tier 2 changes (items within tier 2 may be used in any order but should only be used if all tier 1 items have been used);
- (c) tier 3 changes (items within tier 3 may be used in any order but should only be used if all tier 1 and tier 2 items have been used); and
- (d) tier 4 changes (items within tier 4 may be used in any order but should only be used if all tier 1, tier 2 and tier 3 items have been used).

The Scope Ladder is as follows:

Item	Summary Description	Changes to Statement of Requirements
Tier 1		
(i)	Eliminate requirement for enclosed plant rooms	<ol style="list-style-type: none"> 1) Delete the portion of section 5.2.1.7 calling for all items requiring maintenance to be mounted in a plant room. 2) Delete section 5.2.1.13(1).
Tier 2		
(i)	Eliminate N+1 requirement for mechanical systems	Delete the reference to 'N+1 redundancy' in section 6.19.9.1, with the exception of the N+1 for the in-row cooling units for the Server Room.
(ii)	Adjustment to exterior material percentages	<p>Adjust sections:</p> <ol style="list-style-type: none"> 1) 4.4.1.8 (2) adjustment to minimum percentage use of primary materials from 65% to 55% for school. 2) 4.4.1.8(2)(d) adjustment to maximum percentage use of secondary materials from 35% to 45% for school. 3) 4.4.1.8(3) (a) adjustment to maximum percentage of secondary materials from 70% metal paneling to 80% for Maintenance/IT Building. 4) 4.4.1.8(3)(b) adjustment to architectural concrete from 30% to 20% on maintenance building.
(iii)	Eliminate security shutters everywhere but the CTE shops	<ol style="list-style-type: none"> 1) Modify section 6.20.3.8 to read as follows: "Roll shutters shall be provided for windows on ground floor, as indicated in the Room Data Sheets, and accessible from grade and will be powered but key operated." 2) Delete reference to 'security shutters' in all the Room Data Sheets with the exception of 4.01, 4.04, 4.06, 4.08 and 4.11.
(iv)	Eliminate all interior cameras; leave infrastructure for future installation	Delete the reference to the inside cameras in section 6.20.4.1(1).
Tier 3		
(i)	Change lighting from LED to fluorescent	<p>In sections 6.18.17 and 6.18.19:</p> <ol style="list-style-type: none"> 1) Replace all interior general lighting from LED to fluorescent. 2) Replace all references for drivers (for LED lighting) to fluorescent ballast that meets the functionality required. 3) Light lost factor and depreciation factors will be taken into account.

Item	Summary Description	Changes to Statement of Requirements
(ii)	Delete Wellness Centre and UBC Counseling Centre	1) Delete the following sections in their entirety: - 4.3.5.1(4)(d) / 4.4.1.7(4)(d).4 and d.(5) / 4.9.1.11(2) / 4.9.1.11(3)(b) / 4.9.1.11(4)(b) / 4.9.1.11(5) / 4.9.1.11(6) / 6.18.12.2(18)(f). 2) Delete all references to the Wellness Centre and UBC Counselling Centre in the Functional Program and the Room Data Sheets.
Tier 4		
(i)	Delete Maintenance/IT Building	1) Remove the references to the Maintenance/IT Building where included in sections that also refer to other areas (for example, but not limited to): sections 1.2.1 / 2.3.1.24 / 4.4.1(8)(4) / 4.4.1.8(5) / 6.8.12.1(5) / 6.9.4.2(1) / 6.13.1.2(1)(b) / 6.13.1.2(1)(f) / 6.18.3.2(1)(c) / 6.18.23.1(1)]. 2) Delete the following sections in their entirety: - 2.3.1.21 / 3.2.9.5 / 3.4.1.5 / 3.5.2 / 4.3.5.1(4)(f) / 4.3.5.9(1) / 4.3.5.10 / 4.4.1.7(3)(b) / 4.4.1.8(3) / 4.9.1.12 / 6.8.12.1(2) / 6.8.12.1(6)(d) / 6.9.5.2(1)(b) / 6.9.5.2(2)(b) / 6.18.7.1 / 6.18.26 / 6.22.1.1(2) / 6.22.1.4(1) 3) Delete all references to the Maintenance/IT Building in the Functional Program and the Room Data Sheets.

5 PROPOSAL REQUIREMENTS

5.1 PARTICIPATION AGREEMENT

As a condition of participating in this RFP each Proponent must sign and deliver to the Contact Person a Participation Agreement, substantially in the form attached as Appendix F or otherwise acceptable to the Owner in its discretion. Proponents will not be permitted to participate in Collaborative Meetings or participate further in the Competitive Selection Process unless and until they have signed and delivered a Participation Agreement as required by this Section.

5.2 PROPOSAL FORM AND CONTENT

Proposals should be in the form and include the content described in Appendix B. Each Proponent may only submit one Technical Submission and, if invited to do so, one Financial Submission.

6 SUBMISSION INSTRUCTIONS

6.1 SUBMISSION TIMES AND SUBMISSION LOCATION

With respect to the delivery of Proposals:

- (a) **Technical Submission:** Proponents must submit the Technical Submission to the Submission Location by the Submission Time for Technical Submissions. The Technical Submission should be made up of the following:
- (1) the cover letter (and all attachments) to the Technical Submission as described in the Technical Submission Section of Appendix B; and
 - (2) the portion of the Proposal Requirements described in the Technical Submission section of Appendix B.
- (b) **Financial Submission:** If invited to do so pursuant to Section 7.1, Proponents must submit the Financial Submission to the Submission Location by the Submission Time for Financial Submissions. The Financial Submission should be made up of the following:
- (1) a completed Proposal Declaration Form in the form attached as Appendix C;
 - (2) the cover letter (and all attachments) to the Financial Submission as described in the Financial Submission Section of Appendix B;
 - (3) the portion of the Proposal Requirements described in the Financial Submission section of Appendix B;
 - (4) if and to the extent required in order to keep the Nominal Cost of the Proposal from exceeding the Design-Build Price Ceiling, written descriptions of:
 - i. proposed amendments to the scope of the Project, made in accordance with Section 4.3; and
 - ii. amendments to its Technical Submission if reasonably required as a direct result of such scope changes.

6.2 NUMBER OF COPIES

For each of its Technical Submission and Financial Submission, a Proponent should submit five bound copies numbered 1 through 5 (one copy marked as “Master”), and one electronic copy (USB flash drive) in PDF or Microsoft Excel 2010 format, as appropriate, without security, with a label on each describing its contents, appropriately packaged and clearly marked “Request for Proposals for New Westminster

Secondary School Replacement Project". For its Technical Submission, a Proponent should submit drawings according to the requirements described in Appendix B.

6.2.1 Electronic Copies

To facilitate the Owner's evaluation, Proponents should provide the electronic copies of their Technical Submission and Financial Submission in a number of separate files. As a minimum breakdown, and with reference to Appendix B, Proponents should provide individual files for the following Proposal Requirement sections:

- (a) Entire Technical Submission
- (b) Package 1: Transmittal Package (Technical)
- (c) Package 2: Technical Submission
 - (1) Proponent Team
 - (2) Project Approach, Management and Construction
 - (3) Design and Construction
- (d) Package 3: Scored Elements
- (e) Package 4: Transmittal Package (Financial)
- (f) Package 5: Financial Submission

In addition, Proponents should provide individual files for each drawing or sketch logically organized in folders for each discipline with a reference to the specific Proposal Requirement section.

6.3 NO FAX OR EMAIL SUBMISSION

Proposals submitted by fax or email will not be accepted, except as specifically permitted in this RFP.

6.4 LANGUAGE OF PROPOSALS

Proposals should be in English. Any portion of a Proposal not in English may not be evaluated.

6.5 RECEIPT OF COMPLETE RFP

Proponents are responsible to ensure that they have received the complete RFP, as listed in the table of contents of this RFP, plus any Addenda. A submitted Proposal will be deemed to have been prepared on the basis of the entire RFP issued prior to the Submission Time for Technical Supplements. The Owner accepts no responsibility for any Proponent lacking any portion of this RFP.

6.6 ENQUIRIES

All enquiries regarding any aspect of this RFP should be directed to the Contact Person by email (each an “**Enquiry**”).

Proponents are encouraged to submit Enquiries at an early date to permit consideration by the Owner:

- for Enquiries of a technical nature: prior to 15:00 Pacific Time on the day that is 10 Business Days before the Submission Time for Technical Submissions; and
- for Enquiries of a financial nature: prior to 15:00 Pacific Time on the day that is 5 Business Days before the Submission Time for Financial Submissions.

The Owner may, in its discretion, decide not to respond to any Enquiry.

All Enquiries regarding any aspect of this RFP should be directed to the Contact Person by email, and the following applies to any Enquiry:

- (a) responses to an Enquiry will be in writing;
- (b) all Enquiries, and all responses to Enquiries from the Contact Person, will be recorded by the Owner;
- (c) a Proponent may request that a response to an Enquiry be kept confidential by clearly marking the Enquiry “Commercial in Confidence” if the Proponent considers that the Enquiry is commercially confidential to the Proponent;
- (d) if the Owner decides that an Enquiry marked “Commercial in Confidence”, or the Owner’s response to such an Enquiry, must be distributed to all Proponents, then the Owner will permit the enquirer to withdraw the Enquiry rather than receive a response and if the Proponent does not withdraw the Enquiry, then the Owner may provide its response to all Proponents;
- (e) notwithstanding Sections 6.6 (c) and 6.6 (d):
 - (1) if one or more other Proponents submits an Enquiry on the same or similar topic to an Enquiry previously submitted by another Proponent as “Commercial in Confidence”, the Owner may provide a response to such Enquiry to all Proponents; and
 - (2) if the Owner determines there is any matter which should be brought to the attention of all Proponents, whether or not such matter was the subject of an Enquiry, including an Enquiry marked “Commercial in Confidence”, the Owner may, in its discretion, distribute the Enquiry, response or information with respect to such matter to all Proponents.

Information offered from sources other than the Contact Person with regard to this RFP is not official, may be inaccurate, and should not be relied on in any way, for any purpose.

6.7 ELECTRONIC COMMUNICATION

Proponents should only communicate with the Contact Person by email. Other methods of communication, including telephone or fax, are discouraged. The Contact Person will not respond to any communications sent by fax.

The following provisions will apply to any email communications with the Contact Person, or the delivery of documents to the Contact Person by email where such email communications or deliveries are permitted by the terms of this RFP:

- (a) the Owner does not assume any risk or responsibility or liability whatsoever to any Proponent:
 - (1) for ensuring that any electronic email system being operated for the Owner or Partnerships BC is in good working order, able to receive transmissions, or not engaged in receiving other transmissions such that a Proponent's transmission cannot be received; or
 - (2) if a permitted email communication or delivery is not received by the Owner or Partnerships BC, or received in less than its entirety, within any time limit specified by this RFP; and
- (b) all permitted email communications with, or delivery of documents by email to, the Contact Person will be deemed as having been received by the Contact Person on the dates and times indicated on the Contact Person's electronic equipment.

6.8 ADDENDA

The Owner may, in its discretion through the Contact Person, amend this RFP at any time by issuing a written Addendum. Written Addenda are the only means of amending or clarifying this RFP, and no other form of communication whether written or oral, including written responses to Enquiries as provided by Section 6.6, will be included in, or in any way amend, this RFP. Only the Contact Person is authorized to amend or clarify this RFP by issuing an Addendum. No other employee or agent of the Owner is authorized to amend or clarify this RFP. The Owner will provide a copy of all Addenda to all Proponents.

6.9 INTELLECTUAL PROPERTY RIGHTS

- (a) Grant of Licence

Subject to Section 6.9 (b), by submitting a Proposal, each Proponent will, and will be deemed to have:

- (1) granted to the Owner a royalty-free licence without restriction to use for this Project any and all of the information, ideas, concepts, products, alternatives, processes, recommendations, suggestions and other intellectual property or trade secrets (collectively the "**Intellectual**

Property Rights”) contained in the Proponent’s Proposal, or that are otherwise disclosed by the Proponent to the Owner; and

(2) in favour of the Owner, waived or obtained, a waiver of all moral rights contained in the Proposal.

Proponents will not be responsible or liable for any use by the Owner or any sub-licensee or assignee of the Owner of any Intellectual Property Rights contained in a Proposal.

(b) Exceptions to Licence

The licence granted under Section 6.9 (a) does not extend to Third Party Intellectual Property Rights to non-specialized third-party technology and software that are generally commercially available. By submitting a Proposal, each Proponent represents to the Owner that it owns or has, and will continue to own or have at the Submission Time for Technical Submissions, all necessary rights to all Third Party Intellectual Property Rights contained in its Proposal or otherwise disclosed by the Proponent to the Owner and, subject to the foregoing exceptions, has the right to grant a licence of such Third Party Intellectual Property Rights in accordance with Section 6.9 (a).

6.10 DEFINITIVE RECORD

The electronic conformed version of the document in the custody and control of the Owner prevails.

6.11 AMENDMENTS TO PROPOSALS

A Proponent may:

- (a) amend any aspect of its Technical Submission by delivering written notice, or written amendments, to the Submission Location prior to the Submission Time for Technical Submissions;
- (b) amend any aspect of its Financial Submission by delivering written notice, or written amendments, to the Submission Location prior to the Submission Time for Financial Submissions; and
- (c) in its Financial Submission, amend its Technical Submission as contemplated in Section 6.1 (b).

A Proponent may not amend any aspect of its Proposal except as set out above.

6.12 CHANGES TO PROPONENT TEAMS

If for any reason a Proponent wishes or requires to add, remove or otherwise change a member of its Proponent Team after it was shortlisted by the Owner under the RFQ, or there is a material change in

ownership or control (which includes the ability to direct or cause the direction of the management actions or policies of a member) of a member of the Proponent Team, or there is a change to the legal relationship among any or all of the Proponent and its Proponent Team members, then the Proponent must submit a written application to the Owner for approval, including supporting information that may assist the Owner in evaluating the change. The Owner, in its discretion, may grant or refuse an application under this Section, and in exercising its discretion the Owner will consider the objective of achieving a competitive procurement process that is not unfair to the other Proponents. For clarity:

- (a) the Owner may refuse to permit a change to the membership of a Proponent Team if the change would, in the Owner's judgement, result in a weaker team than was originally shortlisted; or
- (b) the Owner may, in the exercise of its discretion, permit any changes to a Proponent Team, including changes as may be requested arising from changes in ownership or control of a Proponent or a Proponent Team member, or changes to the legal relationship among the Proponent and/or Proponent Team members, such as the creation of a new joint venture or other legal entity or relationship in place of the Proponent Team originally shortlisted.

The Owner's approval may include such terms and conditions as the Owner may consider appropriate.

6.13 VALIDITY OF PROPOSALS

By submitting a Proposal, each Proponent agrees that:

- (a) its Proposal, including all prices and input costs, will remain fixed and irrevocable from the Submission Time for Financial Submissions until midnight at the end of the 90th day following the Submission Time for Financial Submissions (the "**Proposal Validity Period**"); and
- (b) after the expiry of the Proposal Validity Period, all prices and input costs in its Proposal may not be adjusted unless the Proponent provides notice to the Owner of any proposed adjustment and demonstrates to the satisfaction of the Owner that the Proponent has used its best efforts to continue to maintain the prices and input costs firm and valid, but that despite such best efforts, the specified adjustments to the prices and input costs are required solely as a direct result of one or more events that:
 - (1) are external to the Proponent and the Proponent Team members;
 - (2) could not have been prevented by, and are beyond the control of, the Proponent and any of its Proponent Team members; and
 - (3) constitute a material adverse change to the conditions underlying the prices and input costs that are subject to the adjustment.

A Proponent may indicate in its Proposal a Proposal Validity Period that exceeds 90 days.

6.14 MATERIAL CHANGE AFTER SUBMISSION TIME FOR FINANCIAL SUBMISSIONS

A Proponent will give immediate notice to the Owner of any material change that occurs to a Proponent after the Submission Time for Financial Submissions, including a change to its membership or a change to the Proponent's financial capability.

6.15 ACCEPTABLE EQUIVALENTS

The Statement of Requirements is intended to generally be performance-based, but include in some instances specific requirements related to design and construction, such as room types and sizes, adjacencies, access requirements, products, materials, equipment and building systems (including structural, foundation, mechanical (HVAC), information technology and electrical) that the Owner considers are important to meet the Owner's objectives. However, the Owner wishes to provide flexibility for Proponents to propose equivalent alternatives that when considered by the Owner in its discretion, continue to meet the Owner's objectives.

A Proponent may submit an Enquiry marked "Commercial in Confidence – Acceptable Equivalent" that identifies the applicable section(s) in the Statement of Requirements that contains the requirement(s) and the Proponent's proposed equivalent that it considers will be equal to or better than the specified requirement(s) and that will still meet the Owner's objectives, along with supporting materials. The Owner may, in its discretion, request clarification, further information or additional supporting materials for the proposed equivalent.

The Owner may, in its discretion:

- (a) respond to indicate that the proposed equivalent is acceptable;
- (b) respond to indicate that the proposed equivalent is acceptable subject to the Proponents' compliance with any conditions identified by the Owner;
- (c) respond to indicate that the Owner does not consider the proposed equivalent to be acceptable;
- (d) request clarification, further information or additional material;
- (e) not respond to the Enquiry; or
- (f) provide any other response in accordance with Section 6.6.

The provisions of Section 6.6 relating to "Commercial in Confidence" Enquiries will apply, including with respect to withdrawal of an Enquiry, Enquiries by more than one Proponent on the same or similar topics, or the Owner's determination if there is a matter which should be brought to the attention of all Proponents.

If the Owner responds to a “Commercial in Confidence” Enquiry, or responds to any Enquiry that is not “Commercial in Confidence”, regarding a proposed equivalent to indicate that the proposed equivalent is acceptable, a Proponent may make its Technical Submission on the basis of the response, and the use of the acceptable equivalent will not in and of itself be a failure to meet the requirements set out in Appendix A.

Unless the Owner responds to indicate that a proposed equivalent is acceptable, a Proponent is at risk that the use of a proposed equivalent will not substantially meet the requirements set out in Appendix A and that the Owner may not invite the Proponent to provide a Financial Submission.

The Owner will be under no obligation to provide the indication of acceptability of the proposed equivalent to the Proponent or to any other Proponent.

Despite any indication by the Owner of the acceptability of an equivalent, the Design-Builder remains responsible for fulfilling all of its obligations and responsibilities under the Design-Build Agreement.

Following selection of the Preferred Proponent, the Design-Build Agreement will, in accordance with Section 8.2, be amended to include all acceptable equivalent(s) used by that Preferred Proponent, or negotiated by the Owner and the Preferred Proponent, whether or not proposed by any other Proponent.

7 EVALUATION

7.1 MANDATORY REQUIREMENTS

The Owner has determined that the following are the Mandatory Requirements:

- (a) the Proponent must have signed and delivered to the Contact Person the Participation Agreement in accordance with Section 5.1;
- (b) the Technical Submission must be received at the Submission Location before the Submission Time for Technical Submissions and the Financial Submission must be received at the Submission Location before the Submission Time for Financial Submissions;
- (c) the Nominal Cost of the Proposal as at the Submission Time for Financial Submissions must not exceed the Design-Build Price Ceiling; and
- (d) Proponents proposing reductions to the scope of the Statement of Requirements must do so in accordance with Section 4.3.

Subject to Section 7.2, the Owner reserves the right to evaluate any Proposal where the Scope Ladder has been exhausted and the Design-Build Price Ceiling requirements have not been met, but will do so only in the event that the Proposals received from all the Proponents do not meet the Design-Build Price Ceiling requirement as per Section 7.1 (c) above.

7.2 EVALUATION OF PROPOSALS

The Owner will evaluate Proposals in the manner set out in Appendix A. The Owner will not evaluate a Proposal if it has been rejected, or if the applicable Proponent has been disqualified, in accordance with this RFP.

The Owner may, in its discretion, take any one or more of the following steps, at any time and from time to time, in connection with the review and evaluation, including ranking, of any aspect of a Proposal, including if the Owner considers that any Proposal, including the Technical Submission or the Financial Submission, or any part of a Proposal, requires clarification or more complete information, contains defects, ambiguities, alterations, qualifications, omissions, inaccuracies or misstatements, or does not for any reason whatsoever satisfy the Owner that the Proposal meets any requirements of this RFP at any time, or for any other reason the Owner in its discretion deems appropriate and in the interests of the Owner and this RFP, or either of them:

- (a) waive any such defect, ambiguity, alteration, qualification, omission, inaccuracy, misstatement or failure to satisfy, and any resulting ineligibility on the part of the Proponent, or any member of the Proponent Team;

- (b) independently consider, investigate, research, analyze, request or verify any information or documentation whether or not contained in any Proposal;
- (c) request interviews or presentations with any, all or none of the Proponents to clarify any questions or considerations based on the information included in Proposals during the evaluation process, with such interviews or presentations conducted in the discretion of the Owner, including the time, location, length and agenda for such interviews or presentations;
- (d) conduct reference checks relevant to the Project with any or all of the references cited in a Proposal and any other persons (including persons other than those listed by Proponents in any part of their Proposals) to verify any and all information regarding a Proponent, inclusive of its directors/officers and Key Individuals, and to conduct any background investigations that it considers necessary in the course of the Competitive Selection Process, and rely on and consider any relevant information from such cited references in the evaluation of Proposals;
- (e) conduct credit, criminal record, litigation, bankruptcy, taxpayer information and other checks;
- (f) not proceed to review and evaluate, or discontinue the evaluation of any Proposals, including any Technical Submission or Financial Submission, and disqualify the Proponent from this RFP; and
- (g) seek clarification or invite more complete, supplementary, replacement or additional information or documentation from any Proponent or in connection with any Proposal, including with any Technical Submission or Financial Submission or any part of their component packages.

Without limiting the foregoing or Appendix A, the Owner may, in its discretion (and without further consultation with the Proponent), reject any Proposal which in the opinion of the Owner: (i) is materially incomplete or irregular, (ii) contains omissions, exceptions or variations (including any modifications, changes or additions to the Final Draft Design-Build Agreement, other than as provided for in Sections 4.3 or 8.2) not acceptable to, or material to, the Owner, (iii) contains any false or misleading statement, claims or information, or (iv) contains any false statements, criminal affiliations or activities by a Proponent or Proponent Team member.

To enable the Owner to take any one or more of the above-listed steps, the Owner may enter into separate and confidential communications of any kind whatsoever, with any person, including any Proponent. The Owner has no obligation whatsoever to take the same steps, or to enter into the same or any communications in respect of all Proponents and Proposals, or in respect of any Proponent, including the Proponent whose Proposal is the subject of the review or evaluation, as the case may be.

The review and evaluation, including the scoring and ranking, of any Proposal may rely on, take into account and include any information and documentation, including any clarification, more complete, supplementary and additional or replacement information or documentation, including information and

documentation obtained through any of the above-listed investigations, research, analyses, checks, and verifications.

Proponents may not submit any clarifications, information or documentation in respect of the Technical Submission after the Submission Time for Technical Submissions and in respect of the Financial Submission after the Submission Time for Financial Submissions, without the prior written approval of the Owner or without an invitation or request by the Owner.

If any information, including information as to experience or capacity, contained in a Proposal is not verified to the Owner's satisfaction, the Owner may, in its discretion, not consider such cited experience, capacity or other information.

The Owner is not bound by industry custom or practice in taking any of the steps listed above, in exercising any of its discretions, in formulating its opinions and considerations, exercising its discretions in making any decisions and determinations, or in discharging its functions under or in connection with this RFP, or in connection with any Proponent, Proposal, or any part of any Proposal, including any Technical Submission or Financial Submission.

As part of the evaluation of a Technical Submission, the Owner may identify that the Owner is not satisfied that the Technical Submission meets one or more requirements of the Final Draft Design-Build Agreement. The Owner may, but is not required to, reject that Proposal in accordance with the terms of this RFP. If the Owner does not exercise its discretion to reject the Proposal, the Owner may provide to the Proponent a list of the items that the Owner is not satisfied meet the requirements of the Final Draft Design-Build Agreement. The Proponent will, if selected as Preferred Proponent, be required to comply with the requirements of the Final Draft Design-Build Agreement, including by rectifying any non-compliances (material or otherwise) in its Proposal. By submitting its Financial Submission, a Proponent that has received such a list will be deemed to have agreed to comply with the requirements of the Final Draft Design-Build Agreement, including by rectifying any non-compliances (material or otherwise) in its Proposal.

If the Owner identifies that the Proponent's energy model does not reflect the Technical Submission, or does not meet the requirements of the RFP including the Final Draft Design-Build Agreement, the Owner may, prior to the Financial Submission, require a Proponent to re-submit the energy model with supporting documentation, acceptable to the Owner. The Owner may, in its discretion, exchange written documentation with the Proponent regarding the evaluation of the Proponent's energy model or may require a meeting with the Proponent.

The Owner is not responsible for identifying all areas in which a Technical Submission does not meet the requirements of the Final Draft Design-Build Agreement. Irrespective of whether the Owner has identified or has failed to identify any such areas, a Proponent is not relieved in any way from meeting the

requirements of this RFP, and if selected as Preferred Proponent will not be relieved from meeting all requirements of the Final Draft Design-Build Agreement, including by rectifying any non-compliances (material or otherwise) in its Proposal.

The Owner will, subject to the provisions of this RFP, invite each Proponent that has delivered a Technical Submission that has not been rejected to submit a Financial Submission.

8 SELECTION OF PREFERRED PROPONENT AND AWARD

8.1 SELECTION AND AWARD

If the Owner selects a Preferred Proponent, the Proponent with the highest ranked Proposal will be selected as the Preferred Proponent, and the Owner will invite the Preferred Proponent to enter into final discussions to settle all terms of the Design-Build Agreement, based on the Preferred Proponent's Proposal, including any clarifications that the Preferred Proponent may have provided during the evaluation of Proposals.

If for any reason the Owner determines that it is unlikely to reach final agreement with the Preferred Proponent, then the Owner may terminate the discussions with the Preferred Proponent and proceed in any manner that the Owner may decide, in consideration of its own best interests, including:

- (a) terminating the procurement process entirely and proceeding with some or all of the Project in some other manner, including using other contractors; or
- (b) inviting one of the other Proponents to enter into discussions to reach final agreement for completing the Project.

Any final approvals required by the Owner, such as from the Provincial Government, will be conditions precedent to the final execution or commencement of the Design-Build Agreement.

8.2 FINAL DRAFT DESIGN-BUILD AGREEMENT

It is the intention of the Owner that:

- (a) any issues with respect to the Initial Draft Design-Build Agreement will be discussed during the Collaborative Meetings and fully considered prior to issuance of the Final Draft Design-Build Agreement; and
- (b) once issued, the Final Draft Design-Build Agreement will not be further substantively modified and will be executed by the Preferred Proponent without further substantive amendment, except for changes, modifications and additions:
 - (1) relating to the determination by the Owner, in its discretion, of which:
 - i. parts, if any, of the Proposal are to be incorporated by reference or otherwise, into the Design-Build Agreement or otherwise pursuant to express provisions of the Design-Build Agreement; or
 - ii. modifications, changes or additions, if any, requested by a Proponent pursuant to Section 4.3 that are acceptable to the Owner;

- (2) to those provisions or parts of the Final Draft Design-Build Agreement that are indicated as being subject to completion or finalization, or which the Owner determines in its discretion require completion or finalization, including provisions that require:
 - i. modification or the insertion or addition of information relating to the Design-Builders formation (e.g., corporate, partnership or trust structure) and funding structure; and
 - ii. modification or the insertion or addition of information in order to reflect accurately the nature of the Design-Builder's relationships with its principal subcontractors (including each of the project contractors);
- (3) required by the Owner to complete, based on the Proposal, any provision of the Final Draft Design-Build Agreement, including changes, modifications and additions contemplated in or required under the terms of the Final Draft Design-Build Agreement;
- (4) that are necessary to create or provide for a legally complete, enforceable and binding agreement;
- (5) that enhance clarity in legal drafting; or
- (6) that reflect acceptable equivalents in accordance with Section 6.15.

The Owner also reserves the right in its discretion to negotiate changes to the Final Draft Design-Build Agreement and to the Preferred Proponent's Proposal.

Upon Contract Execution, the Design-Build Agreement, and the instruments and documents to be executed and delivered pursuant to it, supersede (except as expressly incorporated therein) the RFP and the Proposal submitted in respect of the Design-Builder.

8.3 PREFERRED PROPONENT SECURITY DEPOSIT

Subject to the terms of this RFP:

- (a) the Owner will invite the Preferred Proponent to deliver the Preferred Proponent Security Deposit on or before the date and time specified by the Owner, such date not to be earlier than 5 Business Days after notification of the appointment of the Preferred Proponent; and
- (b) the Preferred Proponent's eligibility to remain the Preferred Proponent is conditional upon the Preferred Proponent delivering the Preferred Proponent Security Deposit to the Owner on or before the date and time specified by the Owner.

8.4 RETURN OF SECURITY DEPOSIT

Subject to Section 8.5, the Owner will return the Preferred Proponent Security Deposit to the Preferred Proponent:

- (a) within 10 Business Days after receipt by the Owner of notice of demand from the Preferred Proponent, if:
 - (1) the Owner exercises its right under Section 10.1 to terminate this RFP prior to entering into the Design-Build Agreement for reasons unrelated to the Preferred Proponent or any member of the Preferred Proponent's Proponent Team; or
 - (2) the Owner fails, within the Proposal Validity Period, to execute and deliver an agreement substantially in the form of the Final Draft Design-Build Agreement finalized by the Owner in accordance with Section 8.2, provided that such failure is not the result of:
 - i. the failure of the Preferred Proponent to satisfy any conditions set out in the Final Draft Design-Build Agreement; or
 - ii. any extensions to the Proposal Validity Period arising from any agreement by the Owner to negotiate changes to the Final Draft Design-Build Agreement pursuant to Section 8.2; or
- (b) within 10 Business Days after Contract Execution with such Preferred Proponent.

8.5 RETENTION OF SECURITY DEPOSIT

Notwithstanding any receipt by the Owner of the notice described in Section 8.4, the Owner may, in its discretion, draw on, retain and apply the proceeds of the Preferred Proponent Security Deposit for the Owner's own use as liquidated damages, if:

- (a) the Proponent or any Proponent Team member is in material breach of any term of this RFP or the Participation Agreement; or
- (b) after receipt of written notice from the Owner:
 - (1) the Preferred Proponent fails to execute and deliver an agreement substantially in the form of the Final Draft Design-Build Agreement finalized by the Owner in accordance with Section 8.2; or
 - (2) Contract Execution fails to occur within 30 days (or such longer period as the parties may agree) of receipt of such notice from the Owner,

unless:

- (3) any such failure was the result of a significant event which could not have been reasonably prevented by, or was beyond the reasonable control of, the Preferred Proponent; and
- (4) the Preferred Proponent demonstrates to the Owner's satisfaction, acting reasonably, that the occurrence of such significant event would materially frustrate or render it impossible for the Preferred Proponent to perform its obligations under the Design-Build Agreement for a continuous period of 180 days as if the Design-Build Agreement was in force and effect.

8.6 PARTIAL COMPENSATION FOR PARTICIPATION IN THIS RFP

Upon execution of the Design-Build Agreement, the Owner will pay \$75,000 (inclusive of any GST payable) to each unsuccessful Proponent that:

- (a) complied with the Mandatory Requirements;
- (b) received an invitation to submit a Financial Submission;
- (c) has not withdrawn from the Competitive Selection Process or been disqualified by the Owner in accordance with the terms of this RFP; and
- (d) provides to the Owner written acknowledgment of:
 - (1) the disclaimers, limitations and waivers of liability and claims contained in this RFP, including Section 10.13; and
 - (2) the grant of Intellectual Property Rights to the Owner and waiver of moral rights pursuant to Section 6.9.

If the Owner exercises its right under Section 10.1 to terminate the RFP process prior to entering into the Design-Build Agreement with a Proponent, the Owner will pay to each Proponent that satisfies the requirements (to the extent applicable) set out in (a) – (d) above, the lesser of:

- (a) \$75,000 (inclusive of any taxes payable); and
- (b) the substantiated out-of-pocket costs reasonably incurred by the Proponent in preparing its Proposal,

provided that if the Owner exercises such rights after the selection of a Preferred Proponent, the Preferred Proponent must have delivered the Preferred Proponent Security Deposit in accordance with Section 8.3 to be entitled to receive any such payment.

In determining whether to make available the partial compensation described in this Section 8.6, the Owner considered the potential value of obtaining the licence to the Owner of rights to the Intellectual Property Rights and the waiver of moral rights pursuant to Section 6.9. Accordingly, the Owner may, in its discretion, offer to pay up to \$75,000 (inclusive of any taxes payable) to a Proponent that is not otherwise

entitled to payment under this Section 8.6 on conditions established by the Owner in its discretion. The conditions may include the Owner reviewing the Intellectual Property Rights (such as for a Proposal that was returned) and being satisfied with the value of such rights and the Proponent entering into an agreement with the Owner granting licence rights to the Owner. Such offer and resulting arrangements will not be governed by this RFP.

8.7 DEBRIEFS

The Owner will, following Contract Execution, upon request from a Proponent within 60 days of Contract Execution, conduct a debriefing for that Proponent.

9 CONFLICT OF INTEREST AND RELATIONSHIP DISCLOSURE

9.1 RESERVATION OF RIGHTS TO DISQUALIFY

The Owner reserves the right to disqualify any Proponent that in the Owner's opinion has a conflict of interest or an unfair advantage (including access to any confidential information not available to all Proponents), whether real, perceived, existing now or likely to arise in the future, or may permit the Proponent to continue and impose such conditions as the Owner may consider to be in the public interest or otherwise required by the Owner.

9.2 RELATIONSHIP DISCLOSURE

Each Proponent, including each member of the Proponent Team, should fully disclose all relationships they may have with the Owner, any Restricted Party, or any other person providing advice or services to the Owner with respect to the Project or any other matter that gives rise, or might give rise, to a conflict of interest or an unfair advantage:

- (a) by submission of completed Relationship Disclosure Forms with its Proposal; and
- (b) at any time during the Competitive Selection Process by written notice addressed to the Contact Person promptly after becoming aware of any such relationship.

At the time of such disclosure, the Proponent will include sufficient information and documentation to demonstrate that appropriate measures have been, or will be, implemented to mitigate, minimize or eliminate the actual, perceived or potential conflict of interest or unfair advantage, as applicable. The Proponent will provide such additional information and documentation and implement such additional measures as the Owner or the Conflict of Interest Adjudicator (the "**COI Adjudicator**") may require in its discretion in connection with the consideration of the disclosed relationship and proposed measures.

9.3 USE OR INCLUSION OF RESTRICTED PARTIES

The Owner may, in its discretion, disqualify a Proponent, or may permit a Proponent to continue and impose such conditions as the Owner may consider to be in the public interest or otherwise required by the Owner, if the Proponent is a Restricted Party, or if the Proponent uses a Restricted Party:

- (a) to advise or otherwise assist the Proponent respecting the Proponent's participation in the Competitive Selection Process; or
- (b) as a Proponent Team member or as an employee, advisor or consultant to the Proponent or a Proponent Team member.

Each Proponent is responsible to ensure that neither the Proponent nor any Proponent Team member uses or seeks advice or assistance from any Restricted Party, or includes any Restricted Party in the Proponent Team.

9.4 CURRENT RESTRICTED PARTIES

At this RFP stage, and without limiting the definition of Restricted Parties, the Owner has identified the following persons as Restricted Parties:

- (a) Boughton Law Corporation (COI Adjudicator);
- (b) Joan Young, McMillan LLP (Fairness Advisor);
- (c) Fasken Martineau DuMoulin LLP (Legal Advisor);
- (d) Kirk & Co. Consulting Ltd.;
- (e) Nancy Spooner Consulting Inc.;
- (f) SSA Quantity Surveyors Ltd.;
- (g) Golder Associates Ltd.;
- (h) Lisa Bell & Associates;
- (i) M3 Architecture Inc.;
- (j) Doug Stewart Consulting;
- (k) IBI Group and their sub-consultants, including:
 - (1) CWMM Consulting Engineers Ltd.;
 - (2) Smith + Andersen;
 - (3) Binnie Consulting Ltd.; and
- (l) the Owner and Partnerships BC, including their former and current employees who fall within the definition of Restricted Party.

This is not an exhaustive list of Restricted Parties. Additional persons may be added to, or deleted from, the list during any stage of the Competitive Selection Process through an Addendum.

9.5 CONFLICT OF INTEREST ADJUDICATOR

The Owner has appointed a COI Adjudicator to provide decisions on conflicts of interest, unfair advantage or exclusivity issues, including whether any person is a Restricted Party. The Owner may, at its discretion, refer matters to the COI Adjudicator.

9.6 REQUEST FOR ADVANCE DECISION

A Proponent or a prospective member or advisor of a Proponent who has any concerns regarding whether a current or prospective employee, advisor or member of that Proponent is, or may be, a Restricted Party, or has a concern about any conflict or unfair advantage it may have, is encouraged to request an advance decision by submitting to the Contact Person, not less than 10 Business Days prior to the Submission Time for Technical Submissions, by email, the following information:

- (a) names and contact information of the Proponent and the person for which the advance opinion is requested;
- (b) a description of the relationship that raises the possibility or perception of a conflict of interest or unfair advantage;
- (c) a description of the steps taken to date, and future steps proposed to be taken, to mitigate the conflict of interest or unfair advantage, including the effect of confidential information; and
- (d) copies of any relevant documentation.

The Owner may make an advance decision or may refer the request for an advance decision to the COI Adjudicator. If the Owner refers the request to the COI Adjudicator, the Owner may make its own submission to the COI Adjudicator.

If a Proponent or prospective team member or advisor becomes a Restricted Party, it may be listed in an Addendum or in subsequent Competitive Selection Process documents as a Restricted Party.

9.7 THE OWNER MAY REQUEST ADVANCE DECISIONS

The Owner may also independently make advance decisions, or may seek an advance decision from the COI Adjudicator, where the Owner identifies a potential conflict, unfair advantage, or a person who may be a Restricted Party. The Owner will, if it seeks an advance decision from the COI Adjudicator, provide the COI Adjudicator with relevant information in its possession. If the Owner seeks an advance decision from the COI Adjudicator, the Owner will give notice to the Proponent, and may give notice to the possible Restricted Party so that it may make its own response to the COI Adjudicator.

The onus is on the Proponent to clear any potential conflict, unfair advantage, or Restricted Party, or to establish any conditions for continued participation, and the Owner may require that the Proponent make an application under Section 9.6.

9.8 DECISIONS FINAL AND BINDING

The decision of the Owner or the COI Adjudicator, as applicable, is final and binding on the persons requesting the ruling and all other parties including Proponents, Proponent Team members and the Owner. The Owner or the COI Adjudicator, as applicable, has discretion to establish the relevant processes from time to time, including any circumstances in which a decision may be amended or supplemented.

The Owner may provide any decision by the Owner or the COI Adjudicator regarding conflicts of interest to all Proponents if the Owner, in its discretion, determines that the decision is of general application.

9.9 SHARED USE

A Shared Use Person is a person identified by the Owner as eligible to do work for more than one Proponent, including a person who has unique or specialized information or skills such that the Owner considers in its discretion their availability to all Proponents to be desirable in the interests of the Competitive Selection Process. Any Shared Use Person will be required to agree not to enter into exclusive arrangements with any Proponent.

No Shared Use Persons have been identified for this Project.

9.10 EXCLUSIVITY

Unless permitted by the Owner in its discretion or permitted as a Shared Use Person, each Proponent will ensure that no member of its Proponent Team, or any Affiliated Person of any member of its Proponent Team, participates as a member of any other Proponent Team.

If a Proponent contravenes the foregoing, the Owner reserves the right to disqualify the Proponent or may permit the Proponent to continue and impose such conditions as may be required by the Owner. Each Proponent is responsible, and bears the onus, to ensure that the Proponent, its Proponent Team members and their respective Affiliated Persons do not contravene the foregoing.

A Proponent or a prospective Proponent Team member who has any concerns regarding whether participation does or will contravene the foregoing is encouraged to request an advance decision in accordance with this Section through the following process:

- (a) to request an advance decision on matters related to exclusivity, the Proponent or prospective Proponent Team member should submit to the Contact Person, not less than 10 Business Days prior to the Submission Time for Technical Submissions by email, the following information:

- (1) names and contact information of the Proponent or prospective Proponent Team member making the disclosure;
- (2) a description of the relationship that raises the possibility of non-exclusivity;
- (3) a description of the steps taken to date, and future steps proposed to be taken, to mitigate any material adverse or potential material adverse effect of the non-exclusivity on the competitiveness or integrity of the Competitive Selection Process; and
- (4) copies of any relevant documentation.

The Owner may require additional information or documentation to demonstrate to the satisfaction of the Owner in its discretion that no such non-exclusivity exists or, if it does, that measures satisfactory to the Owner in its discretion have been or will be implemented to eliminate or mitigate any risk to the competitiveness or integrity of the Competitive Selection Process.

9.10.1 Exclusivity – the Owner May Request Advance Decisions

The Owner may also independently make advance decisions, or may seek an advance decision from the COI Adjudicator, where the Owner identifies a matter related to exclusivity. The Owner will, if it seeks an advance decision from the COI Adjudicator, provide the COI Adjudicator with relevant information in its possession. If the Owner seeks an advance decision from the COI Adjudicator, the Owner will give notice to the Proponent so that it may make its own response to the COI Adjudicator.

The onus is on the Proponent to clear any matter related to exclusivity or to establish any conditions for continued participation, and the Owner may require that the Proponent make an application under Section 9.10.

9.10.2 Exclusivity – Decisions Final and Binding

The decision of the Owner or the COI Adjudicator, as applicable, is final and binding on the persons requesting the ruling and all other parties including Proponents, Proponent Team members and the Owner. The Owner or the COI Adjudicator, as applicable, has discretion to establish the relevant processes from time to time, including any circumstances in which a decision may be amended or supplemented.

The Owner may provide any decision by the Owner or the COI Adjudicator regarding matters related to exclusivity to all Proponents if the Owner, in its discretion, determines that the decision is of general application.

10 RFP TERMS AND CONDITIONS

10.1 NO OBLIGATION TO PROCEED

This RFP does not commit the Owner to select a Preferred Proponent or enter into a Design-Build Agreement, and the Owner reserves the complete right to at any time reject all Proposals, and to terminate this RFP and the Competitive Selection Process and proceed with the Project in some other manner.

10.2 NO CONTRACT

Other than to the extent provided in the Participation Agreement, this RFP is not a contract between the Owner and any Proponent, nor is this RFP an offer or an agreement to purchase work, goods or services. No contract of any kind for work, goods or services whatsoever is formed under, or arises from this RFP, or as a result of, or in connection with, the submission of a Proposal, unless the Owner and the Preferred Proponent execute and deliver the Design-Build Agreement, and then only to the extent expressly set out in the Design-Build Agreement.

10.3 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

All documents and other records in the custody of, or under the control of, the Owner are subject to the Freedom of Information and Protection of Privacy Act (“FOIPPA”) and other applicable legislation.

By submitting a Proposal, the Proponent represents and warrants to the Owner that the Proponent has complied with applicable Laws, including by obtaining from each person any required consents and authorizations to the collection of information relating to such individual and to the submission of such information to the Owner and the use, distribution and disclosure of such information as part of the Proposal for the purposes of, or in connection with, this RFP and the Competitive Selection Process.

10.4 COST OF PREPARING THE PROPOSAL

Subject to Section 8.6, each Proponent is solely responsible for all costs it incurs in the preparation of its Proposal, including all costs of providing information requested by the Owner, attending meetings and conducting due diligence.

10.5 CONFIDENTIALITY OF INFORMATION

Subject to the confidentiality conditions in Schedule 1 of the Participation Agreement, all information pertaining to the Project received by any Proponent or Proponent Team member through participation in this RFP is confidential and may not be disclosed without written authorization from the Contact Person,

and in no event will a Proponent discuss the Project with any member of the public or the media without the prior written approval of the Owner. Except as expressly stated in this RFP, and subject to FOIPPA or other applicable legislation, all documents and other records submitted in response to this RFP will be considered confidential; however, such information or parts thereof may be released pursuant to requests under FOIPPA or other applicable legislation.

The Owner has engaged Partnerships BC. Partnerships BC has been, and continues to be, involved in other projects, and the Owner may receive information in respect of other projects which may be relevant to the Project. Subject to the terms of this RFP, including limitations on “Commercial in Confidence” information under Section 6.6, the Owner may, in its discretion, disclose information that is available from the Project to Partnerships BC and other projects, and may obtain information from other projects.

10.6 GENERAL RESERVATION OF RIGHTS

The Owner reserves the right, in its discretion, to:

- (a) amend the scope of the Project and/or modify, cancel or suspend the Competitive Selection Process at any time for any reason;
- (b) accept or reject any Proposal based on the Owner’s evaluation of the Proposals in accordance with Appendix A, and in particular the Owner is not obliged to select the Proposal with the lowest Nominal Cost of the Proposal;
- (c) reject a Proposal that fails to meet the Mandatory Requirements;
- (d) waive a defect, irregularity, non-conformity or non-compliance in or with respect to a Proposal or failure to comply with the requirements of this RFP except for Mandatory Requirements (but subject to the Owner’s right with respect to the Design-Build Price Ceiling requirement as set out in Section 7.1), and accept that Proposal even if such a defect, irregularity, non-conformity or non-compliance or failure to comply with the requirements of this RFP would otherwise render the Proposal null and void;
- (e) reject, disqualify or not accept any or all Proposals without any obligation, compensation or reimbursement to any Proponent or any of its team members subject to any payment required pursuant to Section 8.6;
- (f) re-advertise for new Proposals to this or a modified RFP, call for quotes, proposals or tenders, or enter into negotiations for this Project or for work of a similar nature;
- (g) make any changes to the terms of the business opportunity described in this RFP;
- (h) negotiate any aspects of a Preferred Proponent’s Proposal; and

- (i) amend, from time to time, any date, time period or deadline provided in this RFP, upon written notice to all Proponents.

10.7 NO COLLUSION

Proponents and Proponent Team members, their employees and representatives involved with the Proposal, will not discuss or communicate, directly or indirectly, with any other Proponent or any director, officer, employee, consultant, advisor, agent or representative of any other Proponent (including any Proponent Team member of such other Proponent) regarding the preparation, content or representation of their Proposals.

By submitting a Proposal, a Proponent, on its own behalf and as authorized agent of each firm, corporation or individual member of the Proponent and Proponent Team, represents and confirms to the Owner, with the knowledge and intention that the Owner may rely on such representation and confirmation, that its Proposal has been prepared without collusion or fraud, and in fair competition with Proposals from other Proponents.

10.8 NO LOBBYING

Proponents, Proponent Team members, and their respective directors, officers, employees, consultants, agents, advisors and representatives will not engage in any form of political or other lobbying whatsoever in relation to the Project, this RFP, or the Competitive Selection Process, including for the purpose of influencing the outcome of the Competitive Selection Process. Further, no such person (other than as expressly contemplated by this RFP) will attempt to communicate in relation to the Project, this RFP, or the Competitive Selection Process, directly or indirectly, with any representative of the Owner, the Government of British Columbia (including any Minister or Deputy Minister, any member of the Executive Council, any Members of the Legislative Assembly, or any employee of the Owner), any Restricted Parties, or any director, officer, employee, agent, advisor, consultant or representative of any of the foregoing, as applicable, for any purpose whatsoever.

In the event of any lobbying or communication in contravention of this Section, the Owner in its discretion may at any time, but will not be required to, reject any and all Proposals submitted by that Proponent without further consideration and the Proponent will not be eligible for, or receive, the partial compensation as set out in Section 8.6.

10.9 OWNERSHIP OF PROPOSALS

All Proposals submitted to the Owner become the property of the Owner and will be received and held in confidence by the Owner, subject to the provisions of FOIPPA and this RFP.

10.10 DISCLOSURE AND TRANSPARENCY

The Owner is committed to an open and transparent procurement process. To assist the Owner in meeting its commitment, Proponents will cooperate and extend all reasonable accommodation to this endeavour.

The Owner expects to publicly disclose the following information during this stage of the Competitive Selection Process:

- (a) the RFP;
- (b) the number of Proponents; and
- (c) the name of Proponents.

Following Contract Execution, the Owner expects to publicly disclose:

- (a) the Fairness Advisor's report; and
- (b) the final Design-Build Agreement excluding those portions that may be redacted pursuant to the application of FOIPPA.

Each Proponent agrees that:

- (a) to ensure that all public information generated about the Project is fair and accurate and will not inadvertently or otherwise influence the RFP process, the disclosure of any public information generated in relation to the Project, including communications with the media and the public, must be coordinated with, and is subject to prior written approval of, the Owner;
- (b) it will notify the Owner of any and all requests for information or interviews received from the media; and
- (c) it will ensure that all of the Proponent Team members and others associated with the Proponent comply with the requirements of this RFP.

10.11 FAIRNESS ADVISOR

The Owner has appointed Joan Young (the "**Fairness Advisor**") to monitor the Competitive Selection Process. The Fairness Advisor will provide a written report to the Owner that the Owner will make public.

The Fairness Advisor will be:

- (a) provided with full access to all documents, meetings and information related to the evaluation processes under this RFP that the Fairness Advisor, in its discretion, decides is required; and
- (b) kept fully informed by the Owner of all documents and activities associated with this RFP.

Proponents may contact the Fairness Advisor directly with regard to concerns about the fairness of the Competitive Selection Process.

10.12 LEGAL ADVISOR

Fasken Martineau DuMoulin LLP (Fasken Martineau) is a Restricted Party. By submitting a Proposal, the Proponent expressly consents to Fasken Martineau continuing to represent the Owner for all matters in relation to this RFP and the Project, including any matter that is adverse to the Proponent, despite any information of the Proponent and any solicitor-client relationship that the Proponent may have had, or may have, with Fasken Martineau in relation to matters other than this RFP and the Project. This Section is not intended to waive any of the Proponent's rights of confidentiality or solicitor-client privilege. The Owner reserves the right at any time to waive any provision of this Section.

10.13 LIMITATION OF DAMAGES

Each Proponent on its own behalf and on behalf of the Proponent Team and any member of a Proponent Team:

- (a) agrees not to bring any Claim against the Owner or any of its employees, advisors or representatives for damages in excess of the amount equivalent to the reasonable costs incurred by the Proponent in preparing its Proposal for any matter in respect of this RFP or Competitive Selection Process, including:
 - (1) if the Owner accepts a non-compliant proposal or otherwise breaches, or fundamentally breaches, the terms of this RFP or the Competitive Selection Process; or
 - (2) if the Project or Competitive Selection Process is modified, suspended or cancelled for any reason (including modification of the scope of the Project or modification of this RFP or both) or the Owner exercises any rights under this RFP; and
- (b) waives any and all Claims against the Owner or any of its employees, advisors or representatives for loss of anticipated profits or loss of opportunity if no agreement is made between the Owner and the Proponent for any reason, including:
 - (1) if the Owner accepts a non-compliant proposal or otherwise breaches or fundamentally breaches the terms of this RFP or the Competitive Selection Process; or
 - (2) if the Project or Competitive Selection Process is modified, suspended or cancelled for any reason (including modification of the scope of the Project or modification of this RFP or both) or the Owner exercises any rights under this RFP.

This Section does not limit the Owner's obligation to make payment under Section 8.6, but in no event will the Owner's liability exceed the amount calculated pursuant to Section 8.6.

11 DEFINITIONS AND INTERPRETATION

11.1 DEFINITIONS

Capitalized terms in this RFP that are not defined in this Section have the meaning given in the Design-Build Agreement.

In this RFP:

“Addenda” or **“Addendum”** means an addendum to this RFP issued by the Contact Person as described in Section 6.8.

“Adjusted Nominal Cost of the Proposal” has the meaning set out in Appendix A.

“Affiliated Persons”, or affiliated persons, or persons affiliated with each other, are:

- (a) a corporation and
 - (1) a person by whom the corporation is controlled,
 - (2) each member of an affiliated group of persons by which the corporation is controlled, and
 - (3) a spouse or common-law partner of a person described in subparagraph (1) or (2);
- (b) two corporations, if
 - (1) each corporation is controlled by a person, and the person by whom one corporation is controlled is affiliated with the person by whom the other corporation is controlled,
 - (2) one corporation is controlled by a person, the other corporation is controlled by a group of persons, and each member of that group is affiliated with that person, or
 - (3) each corporation is controlled by a group of persons, and each member of each group is affiliated with at least one member of the other group;
- (c) a corporation and a partnership, if the corporation is controlled by a particular group of persons each member of which is affiliated with at least one member of a majority-interest group of partners of the partnership, and each member of that majority-interest group is affiliated with at least one member of the particular group;
- (d) a partnership and a majority-interest partner of the partnership;
- (e) two partnerships, if
 - (1) the same person is a majority-interest partner of both partnerships,

- (2) a majority-interest partner of one partnership is affiliated with each member of a majority-interest group of partners of the other partnership, or
 - (3) each member of a majority-interest group of partners of each partnership is affiliated with at least one member of a majority-interest group of partners of the other partnership;
- (f) a person and a trust, if the person
- (1) is a majority-interest beneficiary of the trust, or
 - (2) would, if this subsection were read without reference to this paragraph, be affiliated with a majority-interest beneficiary of the trust; and
- (g) two trusts, if a contributor to one of the trusts is affiliated with a contributor to the other trust and
- (1) a majority-interest beneficiary of one of the trusts is affiliated with a majority-interest beneficiary of the other trust,
 - (2) a majority-interest beneficiary of one of the trusts is affiliated with each member of a majority-interest group of beneficiaries of the other trust, or
 - (3) each member of a majority-interest group of beneficiaries of each of the trusts is affiliated with at least one member of a majority-interest group of beneficiaries of the other trust.

“Breakdown of Contract Price” means the form in which Proponents are to provide the Owner costing of the Project and the calculation of the Nominal Cost of the Proposal as set out in Section 4 and Appendix B.

“Business Day(s)” means a standard day for conducting business, excluding government holidays and weekends.

“Business-to-Business Networking Session” has the meaning set out in Section 2.3.

“City” means the City of New Westminster.

“Claim” means any claim, demand, suit, action, or cause of action, whether arising in contract, tort or otherwise, and all costs and expenses relating thereto.

“Collaborative Meetings” has the meaning set out in Section 2.2.

“Competitive Selection Process” means the overall process for the selection of a Preferred Proponent for the Project including, but not limited to, this RFP stage.

“Conflict of Interest Adjudicator” or **“COI Adjudicator”** means the person described in Section 9.5.

“Contact Person” means the person identified as such in the Summary of Key Information.

“Contract Execution” means the time when the Design-Build Agreement and all other agreements related to the Project have been executed and delivered and all conditions to the effectiveness of the Design-Build Agreement have been satisfied.

“Data Room” has the meaning set out in Section 2.5.

“Design-Build Agreement” has the meaning set out in Section 1.1.

“Design-Build Construction Manager” means the individual responsible for leading the construction of the Project, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Design-Build Design Manager” means the Design-Builder’s representative in charge of oversight of the Design Team, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Design-Build Director” means the individual who represents the Design-Builder and has overall responsibility to design and build the Project, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Design-Build Price Ceiling” has the meaning set out in Section 4.1.

“Design-Builder” means the entity that enters into the Design-Build Agreement with the Owner and who has direct responsibility to design and build the Project, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Design Firm(s)” means the firm(s) engaged by the Design-Builder to design the Project, as described in the Respondent’s Response and as may be changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Design Team” means the team responsible for the design, including architects, engineers, and specialty consultants.

“Design Team Technical Lead” means the individual who manages and is responsible for the design consultants and other advisors during development of the design

“Enquiry” has the meaning set out in Section 6.6.

“Facility” means the new school replacing the existing New Westminster Secondary School.

“Fairness Advisor” has the meaning set out in Section 10.11.

“Final Draft Design-Build Agreement” has the meaning set out in Section 2.4.

“Financial Submission” has the meaning set out in Appendix B.

“Freedom of Information and Protection of Privacy Act” or **“FOIPPA”** has the meaning set out in Section 10.3.

“GST” means Goods and Services Tax.

“Guarantor” means an entity providing financial and/or performance support to the Design-Builder by way of a guarantee or a commitment to provide a parent company guarantee or other proposed credit support in relation to the Project, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Interim Financial Review Submission” has the meaning set out in Section 2.6.

“Interim Schedule Review Submission” has the meaning set out in Section 2.6

“Indicative Design” has the meaning set out in Schedule 1 [Statement of Requirements].

“Initial Draft Design-Build Agreement” means the draft Design-Build Agreement labeled “Initial Draft Design-Build Agreement” and posted in the Data Room.

“Intellectual Property Rights” has the meaning set out in Section 6.9.

“Key Individual(s)” of a Proponent means the specific individuals, exclusive to the Proponent, filling the following roles (or equivalent), as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

- Design-Build Director;
- Design-Build Design Manager;
- Lead Architect;
- Design Team Technical Lead; and
- Design-Build Construction Manager.

Key Individuals may fill multiple roles provided they have the qualifications and experience for all the roles. A Key Individual role may only be filled by one individual:

“Lead Architect” means the individual responsible for leading the design of the Project, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Mandatory Requirements” means the proposal requirements described in Section 7.1.

“Nominal Cost of the Proposal” means the nominal sum of the values in the Breakdown of Contract Price.

“Owner” or **“SD40”** means the Board of Education of School District No. 40 (New Westminster).

“Owner Representatives” has the meaning set out in Section 2.2.

“Participation Agreement” has the meaning set out in Section 5.1.

“Partnerships BC” means Partnerships British Columbia Inc.

“Preferred Proponent” means the Proponent selected by the Owner pursuant to this RFP to finalize the Design-Build Agreement.

“Preferred Proponent Security Deposit” means an irrevocable letter of credit in the amount of \$150,000 in the form set out in Appendix G or in such other form acceptable to the Owner in its discretion.

“Project” has the meaning set out in Section 1.1.

“Proponent” means one of the design-builders identified in Section 1.2.

“Proponent Team” means a Design-Builder, its Design Firm(s), its Key Individuals and Guarantors, as identified in the Proponent’s RFQ Response and as may have been changed pursuant to the RFQ or as may be changed pursuant to this RFP.

“Proponent’s Contact Representative” means, for a Proponent, the person who under the RFQ for such Proponent was the “Respondent’s Representative” (as such term is used in the RFQ), as such person may be changed from time to time by the Proponent by written notice to the Owner, and who is fully authorized to represent the Proponent in any and all matters related to this RFP.

“Proposal” means a proposal submitted in response to this RFP.

“Proposal Declaration Form” means a form substantially as set out in Appendix C or as otherwise acceptable to the Owner.

“Proposal Requirements” means the requirements described in Appendix B.

“Proposal Validity Period” has the meaning set out in Section 6.13.

“Relationship Disclosure Form” means a form substantially as set out in Appendix D or as otherwise acceptable to the Owner.

“Request for Proposals” or **“RFP”** means this request for proposals including all appendices, as may be amended by Addenda.

“Request for Qualifications” or **“RFQ”** has the meaning set out in Section 1.2.

“Restricted Party” means those persons (including their former and current employees) who had, or currently have, participation or involvement in the Competitive Selection Process or the design, planning or implementation of the Project, and who may provide a material unfair advantage or confidential information to any Proponent that is not, or would not reasonably be expected to be, available to other Proponents.

“Scope Ladder” has the meaning set out in Section 4.3.

“Scored Elements Adjustment” has the meaning set out in Appendix A.

“Shared Use Person” has the meaning set out in Section 9.9.

“Statement of Requirements” means the functional requirements and specifications for the design and construction of the Facility as set out in the Design-Build Agreement, including Schedule 1 [Statement of Requirements].

“Submission Location” means the submission location identified as such in the Summary of Key Information.

“Submission Time for Collaborative Meeting 1” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Collaborative Meeting 2” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Collaborative Meeting 3” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Financial Submissions” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Interim Financial Review Submission” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Interim Schedule Review Submission” means the date and time identified as such in the Summary of Key Information.

“Submission Time for Technical Submissions” means the date and time identified as such in the Summary of Key Information.

“Technical Reports” has the meaning set out in Section 3.6.

“**Technical Submission**” has the meaning set out in Appendix B.

“**Third Party Intellectual Property Rights**” means all Intellectual Property Rights of any person which is not a member of, or a related party to, a member of the Proponent Team.

11.2 INTERPRETATION

In this RFP:

- (a) any action, decision, determination, consent, approval or any other thing to be performed, made, or exercised by or on behalf of the Owner, including the exercise of “discretion” or words of like effect, unless the context requires it, is at the sole, absolute and unfettered discretion of the Owner;
- (b) the use of headings is for convenience only and headings are not to be used in the interpretation of this RFP;
- (c) a reference to a Section or Appendix, unless otherwise indicated, is a reference to a Section of, or Appendix to, this RFP;
- (d) words imputing any gender include all genders, as the context requires, and words in the singular include the plural and vice versa;
- (e) the word “including” when used in this RFP is not to be read as limiting;
- (f) a reference to a “person” includes a reference to an individual, legal personal representative, corporation, body corporate, firm, partnership, trust, trustee, syndicate, joint venture, limited liability company, association, unincorporated organization, union or government authority; and
- (g) each Appendix attached to this RFP is an integral part of this RFP as if set out at length in the body of this RFP.

This RFP may be subject to the terms of one or more trade agreements.

APPENDIX A EVALUATION OF PROPOSALS

Provided as a separate document.

APPENDIX B PROPOSAL REQUIREMENTS

Provided as a separate document.

APPENDIX C PROPOSAL DECLARATION FORM

By executing this Proposal Declaration, the Proponent agrees to the provisions of the RFP and this Proposal Declaration. Capitalized terms are defined in Section 11.1 of this RFP.

[RFP Proponent's Letterhead]

To: [Insert Client and Address]

Attention: [Insert Contact Person]

In consideration of the Owner's agreement to consider our Proposal in accordance with the terms of the RFP, the Proponent hereby agrees, confirms and acknowledges on its own behalf and on behalf of each member of the Proponent Team, to the extent applicable to such Proponent Team member and within the reasonable knowledge of such Proponent Team member, that:

1. Proposal

- (a) this Proposal Declaration Form has been duly authorized and validly executed by the Proponent;
- (b) the Proponent is bound by all statements and representations in its Proposal;
- (c) its Proposal strictly conforms with the RFP and that any failure to strictly conform with the RFP may, in the discretion of the Owner, be cause for rejection of its Proposal;
- (d) its Proposal is made without collusion or fraud; and
- (e) the Owner reserves the right to verify information in its Proposal and conduct any background investigations including criminal record investigations, verification of the Proposal, credit enquiries, litigation searches, bankruptcy registrations and other investigations on all or any of the Proponent Team members, and by submitting a Proposal, the Proponent and each Proponent Team member agrees that they consent to the conduct of all or any of those investigations by the Owner.

2. Acknowledgements with Respect to the RFP

- (a) the Proponent and each Proponent Team member has received, read, examined and understood the entire RFP including all of the terms and conditions, all documents listed in the RFP Table of Contents, and any and all Addenda;

- (b) the Proponent has provided a Proposal that does not exceed the Design-Build Price Ceiling as defined in the RFP;
- (c) the Proponent and each Proponent Team member agrees to be bound by the entire RFP including all of the terms and conditions, all documents listed in the RFP Table of Contents, and any and all Addenda;
- (d) the Proponent's representative identified below is fully authorized to represent the Proponent and each Proponent Team member in any and all matters related to its Proposal, including but not limited to providing clarifications and additional information that may be requested in association with the RFP;
- (e) the Proponent has disclosed all relevant relationships of the Proponent and each Proponent Team member, in accordance with the instructions and format outlined in the Relationship Disclosure Form; and
- (f) the Final Draft Design-Build Agreement is in a form acceptable to the Proponent and the Proponent will comply with the requirements of the Final Draft Design-Build Agreement, including by rectifying any non-compliances (material or otherwise) in its Proposal.

3. Consent of Proponent Team

- (a) the Proponent has obtained the express written consent and agreement of each member of the Proponent Team, as listed below, to all terms of this Proposal Declaration Form to the extent applicable to such Proponent Team member, and within the reasonable knowledge of such Proponent Team member.

4. The Proponent Team consists of:

Name (individuals and companies)	Address	Role of Proponent Team Member (e.g., Design-Builder, Lead Architect, Guarantor)

**PROPONENT'S CONTACT
REPRESENTATIVE**

Name

Name of Employer

Address

Email Address

Name of Authorized Signatory

Telephone

Signature

If the Proponent is a joint venture, consortium or special purpose entity – by each of its joint venture or consortium members, as applicable, as identified in the response to the RFQ as the respondent or the respondent team lead(s), or as otherwise acceptable to the Owner.

APPENDIX D RELATIONSHIP DISCLOSURE FORM

By executing this Relationship Disclosure Form, the Proponent is making the disclosure on its own behalf and on the behalf of each member of the Proponent Team.

The Proponent declares on its own behalf and on behalf of each member of the Proponent Team that:

- (a) this declaration is made to the best of the knowledge of the Proponent and, with respect to relationships of each member of the Proponent Team, to the best of the knowledge of that member;
- (b) the Proponent and the members of the Proponent Team have reviewed the definition of Restricted Parties and the non-exhaustive list of Restricted Parties;
- (c) the following is a full disclosure of all known relationships the Proponent and each member of the Proponent Team has, or has had, with:
 - (1) the Owner;
 - (2) any listed Restricted Party;
 - (3) any current employees, shareholders, directors or officers, as applicable, of the Owner or any listed Restricted Party;
 - (4) any former shareholders, directors or officers, as applicable, of the Owner or any listed Restricted Party, who ceased to hold such position within two calendar years prior to the Submission Time for Technical Submissions; and
 - (5) any other person who, on behalf of the Owner or a listed Restricted Party, has participated or been involved in the Competitive Selection Process or the design, planning or implementation of the Project or has confidential information about the Project or the Competitive Selection Process.

Name of Proponent Team Member	Name of Party with Relationship (e.g., list Owner, Restricted Party)	Details of the Nature of the Relationship with the listed Restricted Party/Person (e.g., Proponent Team member was an advisor to the Restricted Party from 2005-2006)
e.g. Firm Name Ltd.	Partnerships BC	Firm Name Ltd. is working with Partnerships BC on Project X.
e.g. John Smith	Owner Name	Employee from 19XX – 20XX

(Each Proponent Team to submit one Relationship Disclosure Form. Add additional pages as required. Corporate disclosures only need to be provided once and not repeated for every individual of that company).

NAME OF PROPONENT:

Name of Firm – Proponent:

Address:

Email Address:

Telephone:

Name of Authorized Signatory for Proponent:

Signature:

If the Proponent is a joint venture, consortium or special purpose entity – by each of its joint venture or consortium members, as applicable, as identified in the response to the RFQ as the respondent or the respondent team lead(s), or as otherwise acceptable to the Owner.

APPENDIX E PROPONENT COMMENTS FORM

(Collaborative Meetings – s. 2.4 Comments on the Design-Build Agreement)

New Westminster Secondary School Replacement Project

Section	Proposed Change (including detailed drafting)	Reasons for Proposed Change

APPENDIX F PARTICIPATION AGREEMENT

[Insert Month, Day Year]

"[Insert Owner Name]"

Attention: [Insert Contact Name], Contact Person

Dear Sirs/Mesdames:

Re: New Westminster Secondary School Replacement Project – Participation Agreement in respect of the Request for Proposals issued by the Board of Education of School District No. 40 (New Westminster) (the “Owner” or “SD40”) on [Insert Month, Day Year], as amended or otherwise clarified from time to time, including by all Addenda (the “RFP”)

This letter agreement sets out the terms and conditions of the Participation Agreement between [Insert Name of Proponent] (the “Proponent”) and the Owner, pursuant to which the Proponent agrees with the Owner as follows:

- (a) **Defined Terms.** Capitalized terms not otherwise defined in this Participation Agreement have the meanings given to them in the RFP
- (b) **Participation.** The Proponent agrees that as a condition of participating in the RFP, including the Competitive Selection Process, Collaborative Meetings and access to the Data Room, the Proponent will comply with the terms of this Participation Agreement and the terms of the RFP.
- (c) **Confidentiality.** The Proponent will comply with, and will ensure that all of the Proponent Team members and others associated with the Proponent also comply with, the confidentiality conditions attached as Schedule 1 to this Participation Agreement, all of which conditions are expressly included as part of this Participation Agreement.
- (d) **Terms of RFP.** The Proponent will comply with and be bound by, and will ensure that all of the Proponent Team members and others associated with the Proponent also comply with and are bound by, the provisions of the RFP, all of which are incorporated into this Participation Agreement by reference. Without limiting the foregoing, the Proponent agrees:
 - (1) that the terms of this Participation Agreement do not limit the Proponent’s obligations and requirements under the RFP, any Data Room agreement, or any other document or requirement of the Owner;
 - (2) to be bound by the disclaimers, limitations and waivers of liability and claims and any indemnities contained in the RFP, including Section 11.13 (Limitation of Damages) of the

- RFP. In no event will the liability of the Owner exceed the amount calculated pursuant to Section 8.6 (Partial Compensation for Participation in the RFP) of the RFP;
- (3) that the Owner's and the Proponent's obligations in respect of payments of partial compensation or other similar payment are as set out in Section 8.6 (Partial Compensation for Participation in the RFP) of the RFP; and
 - (4) that the Owner's and the Proponent's obligations in respect of the Preferred Proponent Security Deposit are as set out in Sections 8.3, 8.4 and 8.5 of the RFP.
- (e) **Amendments.** The Proponent acknowledges and agrees that:
- (1) the Owner may in its discretion amend the RFP at any time and from time to time; and
 - (2) by submitting a Proposal, the Proponent accepts, and agrees to comply with, all such amendments and, if the Proponent does not agree to any such amendment, the Proponent's sole recourse is not to submit a Proposal.
- (f) **General.**
- (1) *Capacity to Enter Agreement.* The Proponent hereby represents and warrants that:
 - i. it has the requisite power, authority and capacity to execute and deliver this Participation Agreement;
 - ii. this Participation Agreement has been duly and validly executed by it, or on its behalf by the Proponent's duly authorized representatives; and
 - iii. this Participation Agreement constitutes a legal, valid and binding agreement enforceable against it in accordance with its terms.
 - (2) *Survival following cancellation of the RFP.* Notwithstanding anything else in this Participation Agreement, if the Owner, for any reason, cancels the Competitive Selection Process or the RFP, the Proponent agrees that it continues to be bound by, and will continue to comply with, Sections (c) of this Participation Agreement.
 - (3) *Severability.* If any portion of this Participation Agreement is found to be invalid or unenforceable by law by a court of competent jurisdiction, then that portion will be severed and the remaining portion will remain in full force and effect.
 - (4) *Enurement.* This Participation Agreement enures to the benefit of the Owner and binds the Proponent and its successors.
 - (5) *Applicable Law.* This Participation Agreement is deemed to be made pursuant to the laws of the Province of British Columbia and the laws of Canada applicable therein and will be governed by and construed in accordance with such laws.

- (6) *Headings*. The use of headings is for convenience only and headings are not to be used in the interpretation of this Participation Agreement.
- (7) *Gender and Number*. In this Participation Agreement, words imputing any gender include all genders, as the context requires, and words in the singular include the plural and vice versa.
- (8) *Including*. The word including when used in this Participation Agreement is not to be read as limiting.

Yours truly,

(Name of Proponent)

Authorized Signatory

Name of Authorized Signatory
(please print)



SCHEDULE 1 – Confidentiality Conditions

(a) Definitions. In these confidentiality conditions:

- (1) **Confidential Information** means all documents, knowledge and information provided by the Disclosing Party to, or otherwise obtained by, the Receiving Party, whether before or after the date of the RFP, whether orally, in writing or other visual or electronic form in connection with or relevant to the Project, the RFP, the RFQ or the Competitive Selection Process, including, without limitation, all design, operational and financial information, together with all analyses, compilations, data, studies, photographs, specifications, manuals, memoranda, notes, reports, maps, documents, computer records or other information in hard copy, electronic or other form obtained from the Disclosing Party or prepared by the Receiving Party containing or based upon any such information. Notwithstanding the foregoing, Confidential Information does not include information which:
 - i. is or subsequently becomes available to the public, other than through a breach by the Receiving Party of the terms of this Schedule 1;
 - ii. is subsequently communicated to the Receiving Party by an independent third party, other than a third party introduced to the Receiving Party by the Disclosing Party or connected with the Project, without breach of this Schedule 1 and which party did not receive such information directly or indirectly under obligations of confidentiality;
 - iii. was rightfully in the possession of the Receiving Party or was known to the Receiving Party before the date of the RFP and did not originate, directly or indirectly, from the Disclosing Party;
 - iv. was developed independently by the Receiving Party without the use of any Confidential Information; or
 - v. is required to be disclosed pursuant to any judicial, regulatory or governmental order validly issued under applicable law;
- (2) **Disclosing Party** means the Owner or any of its Representatives;
- (3) **Permitted Purposes** means evaluating the Project, preparing a Proposal, and any other use permitted by the RFP or this Participation Agreement;
- (4) **Receiving Party** means a Proponent or any of its Representatives;
- (5) **Representative** means a director, officer, employee, agent, accountant, lawyer, consultant, financial advisor, subcontractor, Key Individual, Project team members or any other person contributing to or involved with the preparation or evaluation of Proposals or proposals, as the

- case may be, or otherwise retained by the Receiving Party, the Owner or Partnerships BC in connection with the Project.
- (b) **Confidentiality.** The Receiving Party will keep all Confidential Information strictly confidential and will not without the prior written consent of the Owner, which may be unreasonably withheld, disclose, or allow any of its Representatives to disclose, in any manner whatsoever, in whole or in part, or use, or allow any of its Representatives to use, directly or indirectly, the Confidential Information for any purpose other than the Permitted Purposes. The Receiving Party will make all reasonable, necessary, and appropriate efforts to safeguard the Confidential Information from disclosure to any other person except as permitted in this Schedule 1, and will ensure that each of its Representatives agrees to keep such information confidential and to act in accordance with the terms contained herein.
- (c) **Ownership of Confidential Information.** The Owner owns all right, title and interest in the Confidential Information and, subject to any disclosure requirements under applicable law, and except as permitted by this Schedule 1, the Receiving Party will keep all Confidential Information that the Receiving Party receives, has access to, or otherwise obtains strictly confidential for a period of three years after the date of the RFP, and will not, without the prior express written consent of an authorized representative of the Owner, which may be unreasonably withheld, use, divulge, give, release or permit or suffer to be used, divulged, given or released, any portion of the Confidential Information to any other person for any purpose whatsoever.
- (d) **Limited Disclosure.** The Receiving Party may disclose Confidential Information only to those of its Representatives who need to know the Confidential Information for the purpose of evaluating the Project and preparing its Proposal or proposal as applicable and on the condition that all such Confidential Information be retained by each of those Representatives as strictly confidential. The Receiving Party will notify Partnerships BC, on request, of the identity of each Representative to whom any Confidential Information has been delivered or disclosed.
- (e) **Destruction on Demand.** On written request, the Receiving Party will promptly deliver to Partnerships BC or destroy all documents and copies thereof in its possession or control constituting or based on the Confidential Information and the Receiving Party will confirm that delivery or destruction to Partnerships BC in writing, all in accordance with the instructions of Partnerships BC (for this purpose information stored electronically will be deemed destroyed upon removal from all storage systems and devices); provided, however, that the Receiving Party may retain one copy of any Confidential Information which it may be required to retain or furnish to a court or regulatory authority pursuant to applicable law.
- (f) **Acknowledgment of Irreparable Harm.** The Receiving Party acknowledges and agrees that the Confidential Information is proprietary and confidential and that the Owner or Partnerships BC

may be irreparably harmed if any provision of this Schedule 1 were not performed by the Receiving Party or any party to whom the Receiving Party provides Confidential Information in accordance with its terms, and that any such harm could not be compensated reasonably or adequately in damages. The Receiving Party further acknowledges and agrees that the Owner will be entitled to injunctive and other equitable relief to prevent or restrain breaches of any provision of this Schedule 1 by the Receiving Party or any of its Representatives, or to enforce the terms and provisions hereof, by an action instituted in a court of competent jurisdiction, which remedy or remedies are in addition to any other remedy to which the Owner may be entitled at law or in equity.

- (g) **Waiver.** No failure to exercise, and no delay in exercising, any right or remedy under this Schedule 1 by the Owner will be deemed to be a waiver of that right or remedy.

APPENDIX G PREFERRED PROPONENT SECURITY DEPOSIT

[Note: The Preferred Proponent Security Deposit should be a Letter of Credit substantially in the following form, issued by, or confirmed by, a Canadian chartered bank acceptable to the Owner in its discretion and be callable at the bank's counters in Vancouver, British Columbia.]

TO: [Insert Authority Name]

<>

(the "Beneficiary")

RE PREFERRED PROPONENT SECURITY DEPOSIT

IRREVOCABLE LETTER OF CREDIT NO: __

Dear Sirs:

At the request of our client, _____ (the Customer), we hereby issue in your favour our irrevocable letter of credit No. _____ (Letter of Credit) for a sum not exceeding in the aggregate one hundred and fifty thousand (CDN \$150,000) effective immediately.

This bank will immediately pay to you under this Letter of Credit any amount or amounts claimed, not exceeding in the aggregate the sum of CDN \$150,000 upon your written demand(s) for payment being made upon us at our counter during normal business hours, **[Note: insert address of Bank in Vancouver, British Columbia]**, Canada referencing this irrevocable Letter of Credit No.

_____ dated _____.

Partial drawings are permitted.

This Letter of Credit is issued subject to Uniform Customs and Practice for Documentary Credits, 2007 Revision, ICC Publication No. 600.

Drawings up to the full amount of the Letter of Credit may be made where the drawing is accompanied by a certificate executed by an authorized signatory of the Beneficiary stating that:

- (a) the person signing the certificate is an authorized signatory of the Beneficiary; and
- (b) the Beneficiary is entitled to draw upon this Letter of Credit.

Any drawings made under this Letter of Credit must be accompanied by the original or certified copy of this Letter of Credit, together with an original certificate complying with the conditions set out above.

We will honour your written demand(s) for payment on presentation without enquiring whether you have a legitimate claim between yourself and our said Customer.

All banking charges are for the account of the Customer.

This Letter of Credit will remain in full force and effect and, unless renewed, will expire at the close of business on [Insert Date].

Notice of non-renewal will be provided to the Beneficiary in writing by registered mail by not later than 20 Business Days before the expiry date.

Authorized Signatory

Authorized Signatory

APPENDIX H CONSTRUCTION INSURANCE UNDERWRITING QUESTIONNAIRE

Posted in the Data Room.

APPENDIX I INITIAL DRAFT DESIGN-BUILD AGREEMENT

Posted in the Data Room.



APPENDIX J BONDING UNDERTAKING

Date: [Insert Month, Day Year]

No. _____

To: [insert Owner Name]

Re: Request for Proposals
[Insert Project Name]

We _____ (name of Surety), a corporation created and existing under the laws of Canada and duly authorized to transact the business of Suretyship in Canada as Surety, are the Surety for _____ (Proponent). Our client has demonstrated to us in the past an ability to complete its projects in accordance with the conditions of its contracts and we have no hesitation in recommending its services to you.

Our client wishes to submit a Proposal for the captioned Project, which we understand will require a Performance Bond of 50% of the Nominal Cost of the Proposal and a Labour and Materials Payment Bond of 50% of the Nominal Cost of the Proposal. Based on the information available at this time, and subject to our assessment of the New Westminster Secondary School Replacement Project, and our client's work program at the time of submission of its Proposal, we do not anticipate a problem in supporting the captioned Project and supplying the requisite bonds if asked to do so. However, the execution of any bonds will be subject to an assessment of the final contract terms, conditions, financing and bond forms by our client and us.

If we can provide any further assurances or assistance, please don't hesitate to call upon us.

(Name of Surety)

_____ (Seal)

Attorney-In-Fact



APPENDIX K COLLABORATIVE MEETING STRUCTURE

A suggested approach for each of the Collaborative Meetings, including example agenda and submission items, is provided below:

(a) Collaborative Meeting 1:

- (1) architectural site plan option(s) with major blocking elements (e.g., learning spaces, teaching and administrative spaces, outdoor areas, parking) showing key circulation, access and adjacencies;
- (2) any unique architectural features that might be equivalent to specified items but need approval;
- (3) high level engineering strategies (mechanical, electrical, structural, civil);
- (4) specific products, services, or areas of interest for the Business-to-Business networking session;
- (5) commentary on Initial Draft Design-Build Agreement;
- (6) commentary on schedule; and
- (7) commentary on affordability or expensive/problematic specification items.

(b) Collaborative Meeting 2:

- (1) resolution of any issues raised by the Owner in Collaborative Meeting 1;
- (2) architectural floor plans to a concept plan level of completion sufficient to illustrate functionality of spaces and key adjacencies;
- (3) civil works;
- (4) any features or proposed Acceptable Equivalents needing advanced consideration or review including engineering issues (refer to Section 6.15 for further details);
- (5) commentary on Initial Draft Design-Build Agreement;
- (6) discussion of key elements of the Interim Schedule Review Submission; and
- (7) Proponent opinions on areas of the Statement of Requirements that may:
 - i. exceed typical industry specifications related to quality and performance for facilities of this type;
 - ii. exceed good industry practices and related standards in relation to redundancy and spare capacity;

- iii. drive unexpected outcomes and/or costs; or
- iv. be achieved in a more efficient manner.

(c) Collaborative Meeting 3:

- (1) resolution of any issues raised by the Owner in Collaborative Meeting 2;
- (2) architectural floor plans to a concept plan level of completion sufficient to illustrate functionality of spaces, travel flows and key adjacencies;
- (3) any features or proposed Acceptable Equivalents needing advanced consideration or review including engineering issues (refer to Section 6.15 for further details); and
- (4) commentary on Initial Draft Design-Build Agreement.

(d) Collaborative Meeting 4:

- (1) discussion of key elements of the Interim Financial Submission;
- (2) City of New Westminster design requirements; and
- (3) Any outstanding design issues.

(e) Sample agenda below:

- (1) proposed design and functionality, including presentation of current design with changes from earlier submission(s) highlighted, and including any Owner feedback received;
- (2) discuss requirements of the Statement of Requirements, including any that may result in affordability concerns;
- (3) discuss any outstanding issues, or new issues, on any topic;
- (4) commentary on the Initial Draft Design-Build Agreement; and
- (5) wrap up with Proponent replaying what they heard.

APPENDIX A EVALUATION OF PROPOSALS

The Owner will evaluate the Proposals in accordance with this Appendix A.

1. TECHNICAL SUBMISSIONS

Subject to the terms of this RFP, including Section 7.1 (Mandatory Requirements) and Section 7.2 (Evaluation of Proposals), the Owner will evaluate each Technical Submission to determine whether the Owner is satisfied that the Technical Submission substantially meets the following requirements:

- (a) the provisions of this RFP, including the requirements set out in:
 - (1) Appendix B of this RFP; and
 - (2) the Final Draft Design-Build Agreement;
- (b) demonstration that the Proponent has a good understanding of the Project and the obligations of the Design-Builder under the Design-Build Agreement; and
- (c) demonstration that the Proponent is capable of:
 - (1) performing the obligations and responsibilities of the Design-Builder; and
 - (2) delivering the Project in accordance with the Design-Build Agreement.

If the Owner is not satisfied that the Technical Submission substantially meets the above requirements, the Owner may reject the Proposal and not evaluate it further.

The Owner will also evaluate and score each Technical Submission against the criteria described in Table 1 of this Appendix A. Table 1 describes these criteria and indicates the maximum points available for each criterion and the weighting of each sub-criterion of the criterion where applicable. Where weightings are not indicated, sub-criterion will be weighted equally.

Points will be awarded for how effectively the Proposal responds to the design requirements set out in Schedule 1 [Statement of Requirements] of the Design-Build Agreement in a manner consistent with the evaluation considerations described in Table 1.

Table 1 – Scored Elements Evaluation Criteria and Weighting		
Related Section in Appendix B	Criteria	Points
4.1	<p><u>Interior Design and Functionality</u></p> <p>Extent to which interior design promotes quality teaching and opportunities for varied learning experiences.</p> <p>In assessing interior design, evaluators will consider the following sub-criteria:</p>	50
4.1.a	<p>Formal and Informal Learning Spaces</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) the design of the building and the use of materials provides a diversity of learning spaces; (b) the design of the building provides connectivity between formal learning spaces and informal learning spaces and learning neighbourhoods; and (c) circulation spaces can function as informal learning and social spaces. 	15
4.1.b	<p>Visibility of Teaching and Learning</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) the design of the building and the use of materials optimize opportunities for clear sight lines between, and visibility of, formal and informal learning spaces; and (b) the design of the building facilitates collaboration amongst teachers. 	15
4.1.c	<p>Flexibility and Adaptability</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) teaching and administrative spaces are flexible and adaptable to repurposing without significant changes to 	10

Table 1 – Scored Elements Evaluation Criteria and Weighting		
Related Section in Appendix B	Criteria	Points
	<p>building systems, including structural, mechanical and electrical; and</p> <p>(b) infrastructure can easily be adapted to accommodate advances in information technology.</p>	
4.1.d	<p>Interior Design Functionality</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <p>(a) intuitive wayfinding is maximized (e.g., reduce reliance on written signage); and</p> <p>(b) natural light is maximized where functionality of the space would be enhanced.</p>	10
4.2	<p><u>Exterior Building Design</u></p> <p>Extent to which exterior building design demonstrates an innovative and distinctive architecture.</p> <p>In assessing exterior design evaluators will consider the following sub-criteria:</p>	25

Table 1 – Scored Elements Evaluation Criteria and Weighting		
Related Section in Appendix B	Criteria	Points
4.2.a	<p>Building Character</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) the building’s exterior design will give students, staff, and visitors a positive first impression; (b) the building’s design creates a cohesive relationship with the neighbourhood; (c) the building’s design demonstrates practical and functional relationships between interior and exterior uses; and (d) the building’s design uses a variety of materials, textures, and detailing, supported by a lighting plan, that enhances the building’s appearance. 	25
4.3	<p><u>Outdoor Spaces</u></p> <p>Extent to which Site planning provides well-designed outdoor areas.</p> <p>In assessing outdoor spaces, evaluators will consider the following sub-criteria:</p>	25
4.3.a	<p>Site Design</p> <p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) Site design and landscaping plan gives students, staff, and visitors a positive first impression and contributes positively to public movement through the appropriate use of different materials and textures; and (b) Site design and landscaping plan facilitates visual and physical connectivity within the Site and the nearby community amenities. 	10
4.3.b	Exterior Wayfinding and Circulation	15

Table 1 – Scored Elements Evaluation Criteria and Weighting		
Related Section in Appendix B	Criteria	Points
	<p>Evaluation Considerations: In evaluating, the following will be considered:</p> <ul style="list-style-type: none"> (a) traffic flows (pedestrian, bicycle and vehicular) are well-planned, minimize conflicts, and have logical linkages to bike storage, passenger pick up and drop off areas, and parking; (b) outdoor spaces are well-oriented to related interior spaces; and (c) the design and placement of entranceways contribute to the building’s functionality and ease of use for educational programs and community uses. 	
	Total Points	100

The Technical Submission will be scored and awarded points based on the level of achievement of the criteria in Table 1, based on information provided in the Technical Submission as described in Appendix B, Proposal Requirements.

2. FINANCIAL SUBMISSION

Subject to the terms of this RFP, including Section 7.1 (Mandatory Requirements) and Section 7.2 (Evaluation of Proposals), the Owner will evaluate each of the Financial Submissions to determine whether the Owner is satisfied that the Financial Submission substantially meets the following requirements:

- (a) in accordance with Section 7.1 of the RFP, the Nominal Cost of the Proposal as at the Submission Time for Financial Submissions does not exceed the Design-Build Price Ceiling;
- (b) the Proponent has the financial capacity to meet the obligations of the Project;
- (c) the Proponent has confirmation of a bonding undertaking for a performance bond and a labour and materials payment bond, each in the amount of 50 per cent of the Nominal Cost of the Proposal; and
- (d) the provisions of this RFP, including the requirements set out in:
 - (1) Appendix B of this RFP; and
 - (2) the Final Draft Design-Build Agreement.

If the Owner is not satisfied that the Financial Submission substantially meets the above requirements, the Owner may reject the Proposal and not evaluate it further.

3. RANKING PROCESS

Proposals that have not been rejected will be ranked according to the following process:

Step 1: Highest on Scope Ladder

Each Proposal will be examined to identify the extent to which, if at all, Scope Ladder items, as described in Section 4.3 of this RFP, have been used to achieve the Design-Build Price Ceiling. The Proposals will then be ranked in accordance with the Proponent's use of Scope Ladder items such that the Proponent using the least Scope Ladder items will be ranked the highest, and the Proponent using the most Scope Ladder items will be ranked the lowest.

If as a result of the foregoing ranking, two or more Proposals are ranked highest, those Proposals (and only those Proposals) will be ranked in accordance with Step 2.

Step 2: Lowest Adjusted Nominal Cost of the Proposal

The Owner will calculate the Adjusted Nominal Cost of the Proposal by doing the following:

(a) Scored Elements Adjustment

For the purposes of evaluation and ranking only, the Nominal Cost of the Proposal will be adjusted based on:

- (1) with reference to Table 1 above, calculating the number of points achieved by the Proponent's Proposal to a maximum of 100 points,
- (2) multiplying that calculated number of points by \$60,000 (the value of a point allocated by the Owner for this purpose); and
- (3) subtracting the product from the Nominal Cost of the Proposal.

(b) Energy Model Adjustment

- (1) Adding to the Nominal Cost of the Proposal the net present cost of the annual cost of energy calculated using:
 - i. the proposed Target Energy Cost;
 - ii. the assumed indexation rate of 2.5% for both natural gas and electricity;
 - iii. a discount rate of 4%; and
 - iv. a discount period of 5 years.

The Proposal which offers the lowest Adjusted Nominal Cost of the Proposal as determined by the Owner will receive the highest ranking and be designated the highest-ranked Proposal.

Step 3: Most Advantageous to the Owner

If the Adjusted Nominal Cost of the Proposal of one or more of the other Proposals is not more than \$250,000 higher than the Proposal with the lowest Adjusted Nominal Cost of the Proposal, then the Owner will select from among the Proposal with the lowest Adjusted Nominal Cost of the Proposal and the other Proposals with an Adjusted Nominal Cost of the Proposal not more than \$250,000 higher than the Proposal that in the Owner's discretion is the most advantageous to the Owner, and such Proposal will be designated as the highest ranked Proposal. The Owner expects that it will have to conclude that there are compelling advantages as compared to the Proposal with the lowest Adjusted Nominal Cost of the Proposal before a Proposal with a higher Adjusted Nominal Cost of the Proposal will be selected.

APPENDIX B: PROPOSAL REQUIREMENTS

Proposals are to be presented in two submissions: a Technical Submission and a Financial Submission, each of which consists of the following packages:

TECHNICAL SUBMISSION

Package 1: Transmittal Package for Technical Submission

Package 2: Technical Submission (Technical Review)

Package 3: Technical Submission (Scored Elements)

FINANCIAL SUBMISSION

Package 4: Transmittal Package for Financial Submission

Package 5: Financial Submission (Financial Review)

Note:

The tables below describe the requirements for the Technical Submission and Transmittal Package, and the Financial Submission and Transmittal Package. For ease of reference, Proposals should be written using the section numbers and titles as indicated with variations, if any, clearly identified. Any deviation in a Proposal from the requirements of the RFP or the Final Draft Design-Build Agreement should be clearly noted. Where the Proponent believes there is a redundant request in the requirements of the RFP, the Proponent can prepare the information in one location and clearly refer the evaluators to this location as applicable.

Where a narrative explanation is required, Proponents should limit their narrative to 1500 words in each case.

Proponents should provide required drawings in 24" x 36" format or A1 Metric (five sets) and 11" x 17" format or A3 Metric (three sets).

Proponents may substitute the 24" x 36" drawings with a 36" x 48" format. Where provided electronically, drawings must be to scale and in PDF format.

Defined terms have the meaning set out in the RFP or the Final Draft Design-Build Agreement as the context may require. References to schedules and appendices are to the schedules and appendices to the Final Draft Design-Build Agreement unless otherwise specified.

Table 1: Transmittal Package for Technical Submission

Package 1: Transmittal Package for Technical Submission

The transmittal package is to contain the following information and documents:

a) Name and contact details for the Proponent's Representative.

Please note: The Proponent's Representative will be the only person to receive communications from the Contact Person regarding the RFP.

- i. Name;
- ii. Employer;
- iii. Mailing/courier addresses;
- iv. Telephone number; and
- v. Email address.

b) Provide the Company/Firm name and names of the Key Individuals for the following team members:

- i. Design-Build Director;
- ii. Design-Build Design Manager;
- iii. Lead Architect;
- iv. Design Team Technical Lead; and
- v. Design-Build Construction Manager.

Proponents should submit the required information in the following format:

Individual's Name	Company Name	Role

c) Relationship Disclosure Form(s).

d) Overview table of contents for all parts of the Proposal.

Package 2: Technical Submission (Technical Review)

The Technical Submission should address the requirements set out in the tables below. Proponents should use the section numbers and corresponding titles shown in these tables in their Technical Submission to allow the Owner to evaluate their Technical Submission in accordance with Appendix A.

For the Technical Submissions, Proponents are to assume the following:

- (a) Based on the site investigation data available, there is a potential for methane to be generated.
 - (1) The Technical Submissions must contemplate vapour mitigation to prevent the need for re-design. The design must allow for vapour mitigation to be constructed if necessary.
 - (2) Proponents can assume that the removal of the material may mitigate the potential for methane to be generated.
 - (3) Proponents will be advised on further details regarding methane before the Submission Time for Financial Submissions.
- (b) With respect to the new language in the Statement of Requirements of the Final Draft Design-Build Agreement increasing the washroom counts, Proponents are not expected to have included the additional washrooms in their design and Accommodation Schedule submitted as part of the Technical Submission. However, Proponents are expected to describe how their design would be able to accommodate these additional washrooms as the design progresses, without additional cost to the Owner.
- (c) With respect to the triangular piece of land between the School and Mercer Stadium, Proponents are to assume that the land forms part of Area A available for the new School construction.

Table 2: Technical Submission (Technical Review)

Section No.	Title	Contents (Package 2, Technical Review)
1.	PROPONENT TEAM	Proposal Requirements

Section No.	Title	Contents (Package 2, Technical Review)
1.1	Team Organization	<ul style="list-style-type: none"> a) Provide an organization chart(s), at the corporate level, showing the relationships between Proponent Team members (including major sub-trades and consultants), reporting relationships, and any anticipated changes contemplated over the life of the Design-Build Agreement. b) Provide the business relationships amongst the Proponent Team members (e.g., corporation, joint venture, partnership, subcontractor agreement, and consultant service agreement).
2.	PROJECT APPROACH, MANAGEMENT AND CONSTRUCTION	Proposal Requirements
2.1	Approach and Project Schedule	<ul style="list-style-type: none"> a) Confirm the Proposal substantially meets the provisions of the RFP, including the requirements set out in Appendix B of the RFP and the Final Draft Design-Build Agreement. b) Confirm if any acceptable equivalents, to the extent they have been previously accepted by the Owner as described in Section 6.15 of the RFP, have been used. c) Provide a preliminary project schedule in the form of a Gantt chart, identifying (at a minimum) the following information in bullets i. through vi, as well as written narrative explaining how the Design and Construction will be implemented to achieve the milestone dates and describing the key milestones and decisions on how each align and work together: <ul style="list-style-type: none"> i. Owner has access for move-in, Owner commences operations in the Facility (school starts), and Substantial Completion Date; ii. Critical path items; iii. Development of plans and reports during the construction phase, including: <ul style="list-style-type: none"> 1) Health and Safety Plan; 2) Project Management Plan; 3) Quality Management Plan; and 4) Commissioning Plan.

Section No.	Title	Contents (Package 2, Technical Review)
		<ul style="list-style-type: none"> iv. Design period, including User Group consultation reviews and Submittal schedules and Owner review at various stages as described in the Design-Build Agreement; v. Provision of mock ups and required demonstrations including a detailed description of schedule, location, scope and method of development; vi. Construction Period: <ul style="list-style-type: none"> 1) Site establishment and mobilization; 2) Securing approvals, including permits and licenses; 3) Major construction stages; 4) Utility relocations and/or protection; 5) Testing, commissioning, integration, programming and training; 6) Deficiency review period; 7) Staff move-in period; and 8) Other significant work functions. d) Provide a written narrative describing the proposed project controls, including how the Proponent will manage cost, schedule, documents, procurement and contract administration.
2.2	Construction Approach and Safety	<ul style="list-style-type: none"> a) Describe and provide details of the Proponent’s Construction management plan including: <ul style="list-style-type: none"> i. Coordination with the City of New Westminister; ii. Construction constraints, risks and mitigation strategies, including proximity to an operating school, theatre, arena and sports field; iii. Approach to site access and egress, parking / laydown.
2.3	Commissioning	Describe the Proponent’s process for managing commissioning, including a table of contents or description of the major elements of the Commissioning Plan, as described in the Design-Build Agreement.
3	DESIGN AND CONSTRUCTION	Proposal Requirements

Section No.	Title	Contents (Package 2, Technical Review)
3.1	Facility Design	<p>Provide a narrative and schematic summaries of the Design to explain the Proponent's proposal including, but not limited to:</p> <ul style="list-style-type: none"> a) Exterior renderings demonstrating proposed massing, materials and image of the Facility, including landscaping, and the context of adjacent buildings. Provide a minimum of three exterior renderings, presenting different views, required to communicate intent; b) Interior renderings illustrating the main entry, learning commons, a learning neighbourhood, and a typical classroom; c) Site plan showing existing finish grade levels; d) Describe how the Proponent will preserve sufficient flexibility in the initial design submitted in its Proposal to accommodate changes during the detailed design development process that will take place post-contract award; and e) Provide an Accommodation Schedule (room list) for all Functional Space Requirements identifying for each space: <ul style="list-style-type: none"> i. An area summary of the Proponent's design by department that includes the total net area, a gross area, and the net to gross area ratios for each department; ii. An area summary of the Facility that includes Facility total net and gross areas; and iii. Amount of any variance(s) in net area between the Proponent's design and the Schedule 1 [Statement of Requirements] expressed in real terms and as a percentage. <p>The Accommodation Schedule should follow the Excel template that has been provided in the Data Room. The Owner expects that the Proponent will not change the sequence and terminology in the template provided as it follows the Statement of Requirements.</p>
3.2	Site Development	<p>A Site plan, together with narrative and information, sufficient to demonstrate the intent of the design and its conformance with the requirements of the Statement of Requirements, including:</p> <ul style="list-style-type: none"> a) A colour-coded Site circulation strategy illustrating travel routes and distances for vehicles, pedestrians, bicyclists; staff and visitor arrival and drop-off at main entries; service delivery and waste removal; as well as routes for firefighting access; b) Surface parking plan; and c) Landscape plan for the Site.

Section No.	Title	Contents (Package 2, Technical Review)
3.3	Architecture	<p>a) Provide schematic level drawings, together with narrative and information, sufficient to demonstrate the intent of the design and its conformance with the requirements of the Statement of Requirements, including:</p> <ul style="list-style-type: none"> i. All floor plans (1:100) with area overlays that are consistent with the intent of the Functional Program; ii. Building sections and all building elevations; and iii. Building envelope details. <p>b) Provide a brief outline specification for the following list of materials and finishes:</p> <ul style="list-style-type: none"> i. Exterior building envelope (wall assemblies and roof, windows, doors); ii. Interior finishes; and iii. Outdoor spaces. <p>c) Provide three interior renderings (at a minimum) of the Facility that present different views to communicate interior design intent.</p> <p>d) Provide schedules of room finishes, millwork, furniture finishes, fixtures, fittings and Design-Builder-supplied equipment.</p> <p>e) Provide a master colour palette and sample board of exterior envelope materials.</p> <p>f) Provide any Building Code “alternative solutions” supported by a code consultant’s report outlining and supporting the proposed approach.</p> <p>g) Provide an acoustic strategy report that includes the following:</p> <ul style="list-style-type: none"> i. All acoustic sound levels being provided for all spaces; ii. Outline how the acoustics for the Performing Arts and CTE spaces will be achieved. <p>h) Provide a theatre strategy report, including architectural drawings, prepared by a professional theatre consultant that includes the following:</p> <ul style="list-style-type: none"> i. Demonstrate all flows for on and off stage movements of students, props and band, including large instrument pathways; ii. Clarify how acoustics, sightlines and comfort have been achieved;

Section No.	Title	Contents (Package 2, Technical Review)
		<ul style="list-style-type: none"> iii. Demonstrate how all vestibule light traps function, including the ability to hold students during performance; iv. Demonstrate the flexibility of the Theatre stage and house. i) Provide a code strategy report on all exiting and how all zones will be achieved as outlined in the Statement of Requirements.
3.4	Leadership in Energy and Environmental Design (LEED®) Gold	<ul style="list-style-type: none"> a) Describe how the Project will obtain LEED® Gold certification. b) Provide a preliminary Project scorecard checklist which identifies targeted credits.
3.5	Energy and Sustainability	<ul style="list-style-type: none"> a) Provide an approved energy model, complete with summary of energy model results, inputs, assumptions, and end-use breakdown, including heating, cooling, lights, fans, pumps, service water heating, and plug and process loads. b) Provide calculations and results for total indicative building annual energy consumption, both as MWh and kWh/m², and utility cost. The calculations and results are to be provided with separate listings for Targeted and Non-Targeted Energy Consumption and by energy type. <ul style="list-style-type: none"> i. The Proponents are to use the Owner’s assumed energy unit rates in Appendix 1 of Schedule 8. ii. If considering an alternate type of energy, the Proponent must notify the Owner and the Owner will provide the unit rate which will be used in calculating the energy consumption. c) Provide a summary of the following measures incorporated in the Proposal: <ul style="list-style-type: none"> i. Energy efficiency; ii. Energy management, materials and resources; iii. Water efficiency; iv. Indoor environmental quality; and v. Daylighting strategies, including narratives, calculations, or other supporting documentation.

Section No.	Title	Contents (Package 2, Technical Review)
3.6	Structure	<p>Provide a narrative and schematic level drawings (1:100), including the following:</p> <ul style="list-style-type: none"> a) A description of the structural system and the load paths, including site properties, importance factor, and lateral force-resisting elements; b) Floor and roof framing systems, identifying dimensions of the structural grid, design loads, structural member sizes, deflection and vibration control, and finished floor elevations; and c) Foundation system, including design criteria of site classification and bearing assumptions.
3.7	Mechanical Systems	<p>Provide schematic level drawings, sufficient to demonstrate the intent of the design, including:</p> <ul style="list-style-type: none"> a) Main energy sources; b) HVAC schematics; and c) Plumbing schematics.
3.8	Electrical, Communications and Electronic Safety and Security Systems	<ul style="list-style-type: none"> a) Provide a narrative and schematic level drawings and diagrams sufficient to demonstrate the intent of the design, integration of the systems, and how it meets the requirements of the RFP for the following systems: <ul style="list-style-type: none"> i. Site Plan and incoming services; ii. Power distribution Single Line Diagram and all associated systems including all sizing and types; iii. Lighting and Lighting Controls, including method, quality and control type for every space type; iv. Audio Visual, sound and videoconferencing; v. Public address and paging function; and vi. Electronic Safety and Security systems. b) Provide a layout of these systems on floor plans indicating: <ul style="list-style-type: none"> i. Locations of all service rooms and the serving zone boundary for each Telecommunication Room;

Section No.	Title	Contents (Package 2, Technical Review)
		<ul style="list-style-type: none"> ii. Principal routing of cabling and pathways; iii. Receptacles and Outlet locations; and iv. The wireless cabling grid as specified in Schedule 1 [Statement of Requirements] showing the outlet locations and coverage patterns. <p>c) Provide riser diagrams and design documentation for:</p> <ul style="list-style-type: none"> i. Backbone pathway and cabling system; and ii. Electronic Safety and Security systems. <p>d) Provide narrative and layouts for all communications and electrical rooms. The layouts should include detail to demonstrate that the technical requirements, best practice and standards are being met, with a particular focus on:</p> <ul style="list-style-type: none"> i. Service clearances; ii. Utilization of wall and floor areas, including equipment rack space; and iii. Footprint for future equipment (located either on walls or in equipment racks). <p>e) For the Theatre, provide a narrative and drawings (including integration diagrams) describing the theatrical lighting and control functionality and how it can be used in an educational setting, and details of its features.</p> <p>f) Provide cut-sheets of proposed equipment for the following:</p> <ul style="list-style-type: none"> i. Diesel Generators, including ATS; ii. 600V Switchgear and 12.47kV-600V step-down transformers; iii. UPS; iv. Lighting Luminaires; and v. Lighting Controls.
3.9	Civil Works	Provide a narrative and schematic level civil drawing(s) for civil works, including the following:

Section No.	Title	Contents (Package 2, Technical Review)
		<ul style="list-style-type: none"> a) Site Plan showing storm water, sanitary, domestic water, geothermal works (if any), electrical, roads, parking, loading, sidewalks and bikeways; b) Grading plan of the site with cross-sections through any retaining walls; and c) AutoTURN vehicle sweep path analysis for all types of vehicles accessing the Facility.
3.10	Equipment	<p>Provide the following:</p> <ul style="list-style-type: none"> a) A summary of the processes and activities that will be undertaken to ensure all equipment, including IMIT components, are received, placed, installed and commissioned prior to Substantial Completion; and b) Outline of the roles and timing the Design-Builder would expect the Owner to provide in achieving the above.

Table 3: Technical Submission (Scored Elements)

Section No.	Title	Contents (Package 3, Scored Elements)
4.	SCORED ELEMENTS	Proposal Requirements
		<p>a) Narrative describing the strategy behind the design of the following elements described more fully in Appendix A1;</p> <ul style="list-style-type: none"> i. Section 4.1: Interior Design <ul style="list-style-type: none"> • Section 4.1.a: Formal and Informal Learning Spaces • Section 4.1.b: Visibility of Teaching and Learning • Section 4.1.c: Flexibility and Adaptability • Section 4.1.d: Interior Design Functionality ii. Section 4.2 Exterior Building Design <ul style="list-style-type: none"> • Section 4.2.a: Building Character iii. Section 4.3: Outdoor Spaces <ul style="list-style-type: none"> • Section 4.3.a: Site Design • Section 4.3.b: Exterior Wayfinding and Circulation <p>b) Diagrams, plans, rendering and/or sketches showing concepts and strategies in the design that support the scored element responses listed in 4.0 (b) above.</p>

Package 4: Transmittal Package for Financial Submission

The transmittal package is to contain the following information and documents:

- A letter confirming that the cost of the Proposal is within the Design-Build Price Ceiling and is valid for a period of 90 days beyond the date of this Financial Submission;
- Confirmation of the Scope Ladder items used, if any, to achieve the Design-Build Price Ceiling;
- Confirmation that there have been no changes to the Proponent Team other than those with respect to which the Proponent has complied with Section 7.12 of the RFP; and
- One (1) fully executed copy of Appendix C – Proposal Declaration Form.

Package 5: Financial Submission

The Financial Submission should address the requirements set out in the tables below. Proponents should use the section numbers and corresponding titles shown in these tables in their Financial Submission to allow the Owner to evaluate their Financial Submission in accordance with Appendix A.

Proponents should provide a cover letter with their Financial Submission that includes or attaches:

- (d) Confirmation of bonding undertakings; and
- (e) Completed Form A1 – Breakdown of Contract Price and Monthly Progress Payments.

Section No.	Title	Contents (Package 4, Financial Submission)
5.	Basis of Financial Submission	
5.1	Proposal Authorization	Certified copies of board resolutions or other legally binding evidence where applicable from the Design-Builder approving the Proposal and authorizing submission of the Proposal in response to this RFP.
5.2	Insurance and Bonding	<p>a) Demonstrate the insurability of the Proponent Team by providing written confirmation from insurers that the insurance coverage required by the Final Draft Design-Build Agreement will be available for the Project if the Design-Builder is awarded a contract. Note: Only the Preferred Proponent will be required to submit a completed Appendix H in advance of Contract Execution.</p> <p>b) Demonstrate the bondability of the Design-Builder by providing written confirmation, generally in the form of the bonding undertaking contained in Appendix J, from a surety company acceptable to the Owner and authorized to transact the business of suretyship in British Columbia, that the bonding requirements of the Final Draft Design-Build Agreement will be available for the Project if the Proponent is awarded a contract. The Proponent may alternatively provide the surety's standard form Consent of Surety or Agreement to Bond in respect of a commitment to provide the required performance bond and labour and material payment bond.</p>
5.3	Financial Capacity	<p>a) Demonstrate the financial capacity of the Design-Builder by providing a description of the company that will manage the cash flow and working capital including:</p> <ul style="list-style-type: none"> i. Details of any bankruptcy, insolvency, company creditor arrangement or other insolvency litigation in the last three fiscal years; and ii. Details of any credit rating(s). <p>b) Provide written authorization to permit the Owner to perform a credit check.</p>

Section No.	Title	Contents (Package 4, Financial Submission)
6.	Proposal Price	
6.1	Price Validity	Confirm all prices listed in the Proposal will remain valid for the period of at least 90 days after the Submission Time for Financial Submissions.
6.2	Form A1 – Breakdown of Contract Price and Monthly Progress Payments	<p>Proponents must submit Form A1 – Breakdown of Contract Price and Monthly Progress Payments in both electronic and hard copy. Form A1 will include:</p> <ul style="list-style-type: none"> a) The breakdown of the contract price adding up to the Nominal Cost of the Proposal; and b) Estimated monthly progress payments over the construction schedule: <ul style="list-style-type: none"> i. Estimated progress payments must coincide with work completed based on the Time Schedule. <p>The Proponent’s Form A1 should be consistent with the following:</p> <ul style="list-style-type: none"> i. Produced using the template supplied by the Owner with no changes or entries other than as indicated in the model; ii. Produced in Microsoft Excel version 2010 or newer; iii. Except where otherwise expressly indicated, include all taxes other than GST; iv. Be expressed in Canadian dollars; and v. Include no hidden or password-protected cells or sheets. <p>All sheets should be printed clearly and legibly on 8.5” x 11” paper including row and column references on each page. ‘Form A1 – Breakdown of Contract Price and Monthly Progress Payments’ is supplied in the Data Room.</p>

Form A1 – Breakdown of Contract Price and Monthly Progress Payments

Refer to the Excel document titled ‘Form A1- Breakdown of Contract Price and Monthly Progress Payments’ which is provided in the Data Room.

Form A1 includes a Breakdown of Contract Price input sheet substantially in the form of Table 1 below which includes prices for the work required as described in the RFP and the Design-Build Agreement. These prices include all taxes other than GST, except where otherwise expressly indicated. Provide the cost breakdown for the development, design, construction and commissioning of the Facility to be used in the establishment of the Nominal Cost of the Proposal. These cost estimates should also describe the basis upon which the capital costs have been developed, clearly identifying any exclusions.

Form A1 also includes a Monthly Progress Payments input sheet substantially in the form of Table 2 below which requires the calculation of estimated monthly progress payments over the construction period. These estimated monthly progress payments and the breakdown of the contract price will be used to help determine the Schedule of Prices to be used in Schedule 6 of the Design-Build Agreement as described in the Design-Build Agreement.

Table 1: Breakdown of Contract Price

Breakdown of Contract Price	Value
HARD COSTS	
Division 1 - General Requirements	\$ -
Division 2 - Existing Conditions	\$ -
Division 3 - Concrete	\$ -
Division 4 - Masonry	\$ -
Division 5 - Metals	\$ -
Division 6 - Wood, Plastics and Composites	\$ -
Division 7 - Thermal and Moisture Protection	\$ -
Division 8 - Openings	\$ -
Division 9 - Finishes	\$ -
Division 10 - Specialties	\$ -
Division 12 - Furnishings	\$ -
Division 13 - Special Construction	\$ -
Division 14 - Conveying Equipment	\$ -
Division 21 - Fire Suppression	\$ -
Division 22 - Plumbing	\$ -
Division 23 - Heating, Ventilating and Air Conditioning (HVAC)	\$ -
Division 25 - Integrated Automation	\$ -
Division 26 - Electrical	\$ -
Division 27 - Communications	\$ -

Breakdown of Contract Price	Value
Division 28 - Electronic Safety and Security	\$ -
Division 31 - Earthwork	\$ -
Division 32 - Exterior Improvements	\$ -
Division 33 - Utilities On Site	\$ -
Division 33 - Utilities Off Site	\$ -
Move Costs	\$ -
Site Contamination Clean Up (if applicable)	\$ -
Cash Allowance: Theatre Equipment	\$400,000 -
Cash Allowance: Millwork	\$1,000,000
Cash Allowance: City of New Westminster Electrical Work	\$300,000
Cash Allowance: Mercer Triangle – Design Guidelines	\$100,000
Other (specify)	
Hard Costs Sub-Total	\$ -
SOFT COSTS	
Architectural Design Fees	\$ -
Structural Design Fees	\$ -
Mechanical Engineering Design Fees	\$ -
Electrical Engineering Design Fees	\$ -
Civil Engineering Design Fees	\$ -
Geotechnical Engineering Design Fees	\$ -
Building Envelope Consultants Fees	\$ -
Landscape Architect Fees	\$ -
Code Consultant Fees	\$ -
Legal Advisor Fees	\$ -
Other Consultant - Specify	\$ -
Other Consultant - Specify	\$ -
Other Consultant - Specify	\$ -
Insurances - Specify	\$ -
Insurances - Specify	\$ -
Development Permit	\$ -
Building Permit	\$ -
Development Cost Charges	\$ -
Other - Specify	\$ -
Other - Specify	\$ -
Soft Costs Sub-Total	\$ -

Breakdown of Contract Price	Value
GENERAL EXPENSE COSTS	
Pursuit Costs	\$ -
Mobilization	\$ -
Mockups	\$ -
Ongoing General Expenses	\$ -
Project Staff	\$ -
Project Overhead	\$ -
Construction Equipment	\$ -
Testing	\$ -
Permits and Fees	\$ -
Bonding and Security	\$ -
Insurance	\$ -
General Expense Sub-Total	\$ -
Total Costs	\$ -
Fee	
Nominal Cost of the Proposal (Contract Price)	\$ -

Table 2: Monthly Progress Payments

Period Ending	Expected Monthly Construction Period Payments
Month 1	
Month 2	
Month 3	
...	
...	
...	
...	
...	
Nominal Cost of the Proposal	\$xx