



REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

REQUEST FOR QUOTES

Energide Assessments x 30 across the Regional District

August 29, 2022

1. INTRODUCTION

1.1. PURPOSE

The Regional District of Okanagan Similkameen is requesting submission of Quotes from qualified Energy Assessment Proponents who are registered with Natural Resources Canada. 30 Residential Energuide Assessments, a report and photos should be provided for each home in 2022.

The finished project will give the Regional District 30 Energuide Assessments on homes across the Region.

1.2. BACKGROUND

The RDOS provides services for six municipalities and nine electoral areas. It has a geographic area of approximately 10,400 km² and serves 82,000 residents. The Regional District is running a software pilot currently through a dedicated properate.io online platform. This pilot has resulted in Energuide equivalent scores being generated for 26,000+ homes across the region. To verify the results, the Region would like to perform a number of official NRCAN Energuide evaluations requiring a home visit. This work will result in a sample batch and allow for a comparison of the true results to the software Properate generated outcome. RDOS will clear all rights to share data and photos prior to the assessment taking place.

2. SCOPE OF WORK AND SCHEDULE

2.1. SCOPE OF WORK

The Work includes the following:

- a) Conduct 30 Energuide Assessments for 30 homes in the Regional District
- b) Take photos of the Energuide Assessments in progress
- c) Take photos of the Energuide recipients outside their homes
- d) Present a Summary table with 30x home addresses, 30x Energuide scores and all recommended measures for each home
- e) Present a digital copy of each Energuide assessment, and a file for each home including all relevant photos from each home visit in a shared folder or thumb drive.

The RDOS will present the proponent with a list of addresses and contact information for 30 homes in the Region to perform the evaluations on.

The proponent is required to contact each homeowner to arrange a suitable time for each assessment.

The proponent should complete all pre-assessments and report on the existing and expected Energuide scores by November 15 2022.

The addresses will be based on a fair spread around the region, and will be close to the following in terms of numbers for each location:

Location	Number of Energuide Assessments Required
Area A	1
Area B	1
Area C	1
Area D	1
Area E	1
Area F	1
Area G	1
Area H	1
Area I	1
Penticton	8
Summerland	5
Osoyoos	3
Oliver	3
Princeton	1
Keremeos	1

The post upgrade assessments will be performed at the homeowners discretion.

2.2. SCHEDULE

The target completion date is no later than November 15, 2022.

3. INSTRUCTIONS TO PROPONENTS

3.1. RATES

The RDOS is requesting that proponents provide all-found unit rates for the Work using the form included in Appendix A. Payment will be based on actual units completed.

3.2. EXPERIENCE

The proponent must show they have an understanding of the work, what the work involves and what is required to complete the project. The Proponent must demonstrate that they have completed three (3) projects of similar scope.

3.3. SAFETY PLAN

Prior to the start of the Work, the successful Proponent will be required to supply the Regional District

with a Work Safety Plan, including provisions for Covid-19.

3.4. INSURANCE REQUIREMENTS

The successful proponent will be required to provide proof of insurance using the RDOS's standard insurance form.

3.5. QUOTE SUBMISSIONS

Quotes will be accepted in hardcopy and/or by email.

Hardcopy quote submissions and their envelopes should be clearly marked with the name and address of the Proponent, the RFQ title, and be addressed as follows:

Community Services Department
Regional District of Okanagan-Similkameen
101 Martin Street
Penticton, BC V2A 5J9

Quote submissions sent via email should include the RFQ title in the subject line, and sent to the Project Contact:

Jeremy Dresner – jdresner@rdos.bc.ca

Quotes must be received on or before the Closing Time of:

TIME: September 28, 2022

DATE: 10:00AM PST

The Proponent is responsible for ensuring its Quote is received at the address or email set out above by the Closing Time.

Proponents wishing to make revisions to their Quote after submission but prior to the Closing Time may do so by submitting the revisions by email or hard copy to the Project Contact listed above.

Quotes received after the Closing Time will not be considered.

3.6. ENQUIRIES

Proponents must carefully examine the RFQ documents for any other factor that may affect the Work. No consideration will be given after submission of a Quote to any claim that there was any misunderstanding with respect to undertaking of the Work.

Proponents finding discrepancies or omissions in this RFQ, or having doubts as to the meaning or intent of any provisions therein, should immediately notify the Regional District project contact. If there are any changes, additions, or deletions to the RFQ, Proponents will be advised by means of an Addendum issued by the Regional District. All Addenda will become part of the RFQ. Receipt of Addenda should be acknowledged by the Proponent in their submission.

Verbal discussions between the Proponent and the RDOS (including Regional District directors, trustees, management, or staff) shall not become a part of the RFQ or modify the RFQ unless confirmed by written Addendum.

All project enquiries must be submitted by:

DATE: September 21, 2022

TIME: 10:00AM PST

4. GENERAL TERMS OF QUOTE PROCESS

4.1. QUOTE PREPARATION COSTS

All expenses incurred by the Proponent in preparation and submission of a Quote are to be borne by the Proponent. The Regional District shall not be responsible for any costs involved in or associated with any meetings, discussion or negotiation following submission that may or may not result in acceptance of the Quote and award of a contract.

4.2. QUOTE CONFIDENTIALITY

All Quote submissions become the property of the Regional District and will not be returned. The Regional District reserves the right to make copies of Quotes for its internal review and for review by its financial, accounting, legal, and technical consultants.

Proponents should be aware that the Regional District is a “public body” as defined in and subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. If the Proponent believes any of the information provided by them in their Quote is confidential, then they should identify it as such and provide a rationale as to why it should not be released under “Freedom of Information” legislation.

The rationale for keeping information confidential under this legislation includes:

- a) Trade secrets of the Proponent;
- b) Financial, commercial, scientific or technical information, the disclosure of which could reasonably be expected to result in material financial loss or gain or could reasonably be expected to prejudice the competitive position of the Proponent; or
- c) Information the disclosure of which could be reasonably expected to interfere with contractual or other negotiations of the Proponent.

4.3. CONFLICT OF INTEREST

Quotes must disclose any actual or potential conflicts of interest and existing business relationships the Proponent may have with the Regional District, its elected or appointed officials or employees. The Regional District may rely on such disclosure.

4.4. NO COLLUSION

Except as otherwise specified or as arising by reason of the provision of the contract documents, no person whether natural, or body corporate, other than the Proponent has or will have any interest or share in this Quote or in the proposed contract which may be completed in respect thereof. By submission of a Quote, the Proponent certifies that there is no collusion or arrangement between the Proponent and any other actual or prospective Proponents in connection with Quotes submitted for this project and the Proponent has no knowledge of the contents of other Quotes and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the Quote.

4.5. LITIGATION

Proponents who, either directly or indirectly through another corporation or entity, have been or are in litigation, or who have served notice with intent to proceed with court action against the Regional District in connection with any contract for works or services, may be considered ineligible Proponents. Receipt of Quotes from such Proponents may be disqualified from the evaluation process.

4.6. NO CONTRACT

This RFQ is not a tender and does not commit the Regional District in any way to select a preferred Proponent. By submitting a Quote and participating in the process as outlined in this RFQ, Proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on the Regional District by this RFQ or submissions prior to the acceptance of a Quote and the execution of a formal written contract.

4.7. ACCEPTANCE OF QUOTE

The acceptance of a Quote will be made in writing from the Regional District, and will be sent to the successful Proponent at the address given in the submitted Quote. Following acceptance, the Proponent is expected to enter into a contract with the Regional District to perform the works or services set out in their Quote. Acceptance of a Quote may be subject to approval by the RDOS Board of Directors.

The agreement that the successful Proponent will be expected to execute with the Regional District will contain terms similar to those contained in the sample Contracting Services Agreement provided in Appendix D. The agreement attachments will include the entire Request for Quote, the Proponent's Quote submission and any mutually agreed upon modifications, changes or negotiated adjustments.

4.8. WORKERS COMPENSATION ACT

While undertaking the Work, the Contractor will be required to meet or exceed at all times the Provincial Occupational Health and Safety Regulations. The Contractor will be designated as the Prime Contractor for the purposes of health and safety of the Work site as set out in the WCB Act Section 118, and the Occupational Health and Safety Regulations Sections 3 and 20.

The Proponent, and any proposed sub-contractor(s), should provide a Workers Compensation Board

Registration Number in the Quote and shall at the time of signing a contract, provide proof of having an account that is active and in good standing with Work Safe BC.

4.9. GENERAL

The Regional District reserves the right to reject any or all quotations, to waive any informality, to accept in whole or part such quotations as may be deemed in the best interest of the Regional District. The Regional District also reserves the right to cancel this RFQ at any time.

The Regional District of Okanagan-Similkameen reserves the right to negotiate on any details – including changes to specifications and price. If specifications require significant modification, all business providing quotations shall have the opportunity to adjust their quotes.

Appendix A – Unit Rates

All prices quoted are to be all inclusive, as well as:

1. In Canadian dollars;
2. Exclusive of GST.

Supply/Install Specification	Est. Qty	Unit Price	Amount
Energide Assessments, summary table and photos in a folder		\$	\$