



REQUEST FOR PROPOSAL #06- 40

West Side Waterloo Trail System

SEALED PROPOSALS, marked clearly as to its contents in a company envelope, will be received by the undersigned until

2:00 p.m., Local Time Wednesday, November 15, 2006 Local Time

for the supply of consulting services to explore a number of environmentally sensitive, creative, and economic design alternatives, devise the best possible trail route that connects each segment of the trail system, produce the accompanying construction drawings for the West Side Waterloo Trail System as described in this proposal.

The entire Proposal Document may be down-loaded from our web site, address: www.city.waterloo.on.ca/bidopportunities; or picked up from the City of Waterloo, 265 Lexington Court, Waterloo, ON, N2J 4A8. The appendices 1-4 which are indicated in the proposal will only be available by picking them up at the City of Waterloo Service Centre, 265 Lexington Court, Waterloo, Ontario.

For information regarding purchasing issues for this Proposal, please contact John Miller, Director of Purchasing at (519) 747-8616. For technical issues regarding this project please contact Karen Moyer at 519-747-8609

LOWEST OR ANY PROPOSAL NOT NECESSARILY ACCEPTED.

SECTION A
INSTRUCTIONS TO BIDDERS

INDEX

SUBMISSION OF BIDS	1:00
SUBMISSION OF PROPOSAL	2:00
DESIGNATED OFFICIAL	3:00
BIDDER'S RESPONSIBILITY	4:00
PROPOSAL REGULATIONS	5:00
AWARD OF CONTRACT	6:00
DURATION OF CONTRACT	7:00
INTEREST CHARGES	8:00
PAYMENT	9:00
QUERIES/ADDENDA	10:00
LEGAL CLAIMS	11:00

PROPOSAL # 06- 40
Supply of Consulting Services
INSTRUCTIONS TO BIDDERS

The words "bid" and "proposal" are interchangeable throughout these documents and related documents.

1:00

SUBMISSION OF BIDS

Sealed Proposals shall be submitted in a company envelope clearly stating the Proposal Number as well as the description of the quote to:

Attention: John Miller
Purchasing Department
City of Waterloo
265 Lexington Court
Waterloo, Ontario N2J 4A8

Proposals will be received up to: **2:00 p.m. Local Time Wednesday
November 15, 2006.**

2:00

DESIGNATED OFFICIAL

For the purpose of this proposal, the Director of Purchasing or designate, telephone 519-747-8616, is the "Designated Official" and shall perform the following functions - releasing, recording, and receiving proposals; opening, recording and checking of bids; answering queries of prospective bidders, considering extensions of time, reviewing bids received, ruling on the acceptance of those not completely meeting the proposal requirements and preparing a report and recommendations to Council.

3:00

BIDDER'S RESPONSIBILITY

- a) Prices are to be shown excluding Provincial Sales Tax and Goods and Service Tax. If an item is exempt from either of these taxes, you must state this on the bid form provided.

4:00

PROPOSAL REGULATIONS

- a) Acceptance of Proposals:

Proposals will be examined in accordance with the current purchasing procedures and the awarding of the contract, if awarded, will be made by the City of Waterloo as soon thereafter as practicable

The City of Waterloo reserves the right to reject any or all bids. The lowest proposal will not necessarily be accepted.

b) Withdrawal of Proposal Prior to Proposal Closing:

(i) A bidder on a project may request that his proposal be withdrawn. The withdrawal shall only be allowed if the request is made in writing by the bidder and delivered to the Designated Official before the closing time for the proposal to which it applies.

(ii) Proposals confirmed as withdrawn shall be returned unopened to the bidder. The withdrawal of a proposal does not disqualify a bidder from submitting another proposal prior to the closing time.

c) Improper Bids:

i) Informal and/or Unbalanced Proposals

Proposals which are incomplete, conditional or obscure, or which contain additions not called for, or irregularities of any kind may be rejected by the Designated Official as informal.

All price(s) submitted shall be a reasonable price for each particular item as determined by the Designated Official and under no condition will an unbalanced proposal be considered.

Wherever in a proposal the amount quoted for an item does not agree with the extension for the estimated quantity and the quoted unit price, the unit price shall govern, and the item amount of the total proposal amount shall be adjusted accordingly.

All proposals judged by the Designated Official as being informal and/or unbalanced shall be rejected.

ii) Late bids.
Shall not be accepted and will be returned to the vendor.

iii) Proposal Form:

a) Bids received by the Designated Official on other forms than the supplied Form of Proposal will be rejected.

iv) Bids Not Completed in Ink or by Typed print will be rejected.

v) Partial Bids (all items Not Bid)

Partial bids will be rejected except when the Instructions to Bidders clearly states that an award may be made for individual items (e.g. Proposals such as equipment rental or some material proposals which are in effect several individual bids combined).

vi) Qualified Bid

If a bid is restricted by a statement added to the Form of Proposal or a covering letter or alterations to a proposal form it may be rejected in the judgment of the Designated Official unless the change was requested by the Municipality (i.e. point changed, escalator clause).

vii) Bid not Signed

Bids that are not properly signed will be rejected.

viii) Erasures, Overwriting, Alterations or Strikeouts not Initialed

Providing the price is legible and the erasures, overwriting, alterations or strikeouts are initialed, these bids may be accepted.

ix) Arithmetic Errors

Bids containing arithmetic errors found during the checking procedure by the Project Engineer/Co-ordinator may be accepted. Bid unit prices shall be used to correct extensions.

5:00

AWARD OF CONTRACT

a) The award of this contract may be made in part or whole at the discretion of the City of Waterloo. We reserve the right to change/upgrade any product deemed unsatisfactory after award of contract. The specific item changed may or may not be awarded to existing supplier.

THE LOWEST OR ANY PROPOSAL NOT NECESSARILY ACCEPTED.

b) Duration of Bids:

All bidders agree to leave their bids open for acceptance for a period of sixty (60) calendar days after the closing date of the proposal.

c) Notification of Acceptance of Proposal:

Upon the acceptance of the contract, the Designated Official shall immediately send a Notification of Acceptance to the successful bidder advising them that their proposal has been accepted.

6:00

DURATION OF CONTRACT

a) Starting Date:

The starting date for this contract will be as soon as possible when bids are evaluated. The successful bidder agrees to honor the prices firm for one year. .

b) Renewal or Termination of Proposal

The City of Waterloo reserves the right to extend the contract for further periods upon negotiation with the successful bidder(s). The City or the bidder may, at any time, terminate the renewal upon giving written notice to the other at least 30 days in advance of its desire that the proposal renewal be terminated.

7:00

INTEREST CHARGES

It is the policy of the City of Waterloo that application by the vendors for penalty charges for late payment will not be allowed.

8:00

PAYMENTS

Unless otherwise stipulated in the Form of Proposal, the terms of payment shall be net thirty (30) days from the date of receipt of the invoice. The City of Waterloo will take early payment incentives into consideration when awarding this contract. Please state any applicable early payment incentives in the space provided on the Form of Proposal.

9:00

QUERIES/ADDENDA

Addenda may be issued in writing during the proposal period by the Designated Official. All addenda become part of the proposal documents and must be submitted with the bidder's bid. All addenda will be posted on the City of Waterloo bid opportunities website.

10.00

LEGAL CLAIMS

No proposal, proposal or proposal will be accepted from any company which has a claim or instituted a legal proceeding against the city or against whom the city

has a claim or instituted a legal proceeding with respect to any previous contract, without prior approval by Council.

Proposal# 06- 40
Supply of Consulting Services
Standard Conditions

General

For the supply and delivery of Consulting Services as specified herein.
If material claimed to be equivalent to brand name products given and is offered as a substitute, the supplier shall supply samples and full details thereof to the designate. The City reserves the right to determine whether the merchandise suggested as an equivalent is acceptable in replacement of the item(s) normally supplied.

Quality

All material purchased under this contract must meet or exceed commonly accepted industry standards as to quality of material and workmanship and must be warranted as such.

All materials found to be inferior, in the opinion of the agency, must be returned to the supplier for full purchase credit at no additional cost to the agency.

Invoicing

Invoices must be mailed on a monthly basis to the City of Waterloo Accounts Payable Department, 100 Regina Street, Waterloo, ON N2J 4A8 with the following requirements.

- PO number
- invoice number
- invoice date
- delivery description

PROPOSAL #06- 40

Consulting Services

The form below must accompany the submitted bid proposal/proposal. Please type or print clearly in the spaces provided.

I/We, the undersigned, having carefully read, understood and accepted the Instructions to bidders and Form of Proposal, attached hereto, each and all of which form part of this proposal, agree to supply "*description of product/service to be supplied*".

The unit prices submitted will be firm for a period of one year. State the percentage of increase, if any, for any subsequent year(s) of this contract. Quoted prices are exclusive of P.S.T. and G.S.T. and are **F.O.B. Various City of Waterloo Facilities**. There will be no extra charges paid for shipping/delivery or will there be fuel surcharges of any kind.

COMPANY NAME

ADDRESS

CITY / PROVINCE / POSTAL CODE

PHONE NUMBER

FAX NUMBER

EMAIL ADDRESS

CONTACT NAME

AUTHORIZED SIGNATURE

DATE

The City of Waterloo will take early payment incentives into consideration when awarding this contract. Please state any applicable early payment incentives in the space provided below.

State applicable discount terms for early payment of invoices.

☐ 2% 20 Net 30 Net 30 ☐ Other ☐ _____

Other information for consideration in awarding contract:



RFP 06-40 – ESPA #19 'Forested Hills'

**West Side Waterloo Trail System: Blue Beech Blvd. to
Red Osier Park Block Trail Connection**

October 4, 2006

TABLE OF CONTENTS

1.0 INTRODUCTION

2.0 PROJECT CONTEXT

3.0 PROPOSAL DESCRIPTION

- 3.1 Work Program
- 3.2 Detailed Scope of Work

4.0 SUBMISSION REQUIREMENTS

- 4.1 Project Schedule
- 4.2 Budget
- 4.3 Project Reporting Relationship
- 4.4 Project Team
- 4.5 Proposal Evaluation and Selection of Consultant
- 4.6 Available Data
- 4.7 Proposal Submission

Note: The Appendices listed below are available for viewing at the City of Waterloo, Service Centre, 265 Lexington Court, Waterloo, Ontario.

- Appendix 1 – Airphotograph of Trail Connection and Surrounding Context
- Appendix 2 – City of Waterloo. 1997. Waterloo West Side Trail System Master Plan
- Appendix 3 – The Environmental Lands Acquisition and Maintenance Policy
- Appendix 4 – City of Waterloo Standard Trail Design Drawings

1.0 INTRODUCTION

The West Side of Waterloo is bordered by Wideman Rd. to the north, Erbsville Rd. to the east, Erb St. to the south, and the Wilmot Line to the west. In this area, several new subdivisions have recently been built. The West Side has great ecological significance and due care is given to protect this landscape and its inhabitants.

The West Side is situated on the Waterloo Moraine, which is a deposit of glacial debris formed 14,000 years ago when the glaciers retreated. Many of the City's aquifers are found in the moraine. The City of Waterloo is quite unique in that approximately 80% of its drinking water supplies are taken from these underground sources and are only supplemented by water from the Grand River.

The Forested Hills

Large sections of the moraine are forested and have thus been named the 'Forested Hills', which is of the largest remaining woodlots within the City of Waterloo. The 172 hectare forest is designated as a Regional Environmental Significant Policy Area (ESPA #19) and consists primarily of upland hardwood forest with sections of upland mixed forest, lowland hardwood and mixed forests, plantation areas, old fields and a provincially significant cedar swamp wetland. The woodland contains a healthy range of rare plants, migratory breeding birds, and many other wildlife species.

In 1997, the City began terrestrial monitoring of vegetation, birds and amphibians of the Forested Hills. Nine significant plant species and two significant tree species have been identified within the forest. As well, a number of bird species have been found, including, the Black Throated Blue Warbler, Coopers Hawk, and Eastern Towhee, a regionally significant bird species; as well as the Acadian Flycatcher which is endangered both federally and provincially; and the Hooded Warbler, a threatened species provincially and species of concern federally.

The Environmental Lands Acquisition and Maintenance Policy is referenced for further direction in the creation of management plans for this unique environmental feature.

Forest Buffer Zones

To minimize the impacts of development on the greenspace system, buffer zones ranging from 7m - 30m from the driplines of the existing trees have been established around the edges of the wooded area. In addition, a buffer zone of 15 metres on both sides of Clair Creek has been established to protect the delicate riparian zone. The linear measure of the buffers along the forest edge was based on tree preservation standards of 1.5 times the dripline. The original intent was to provide enough area for the edge tree roots to grow and to allow natural succession to evolve.

A living fence, rather than an unsightly metal fence, is required to discourage access to the forest buffer. A living fence is a barrier of trees and shrubs along with demarcation posts for property lines, which are positioned along the property boundary between the private and public lands. Trails were permitted within the buffer zone as part of the subdivision development agreement, on the condition that the trails are situated as far away from the existing trees as possible.

West Side Trail System Masterplan

On July 28, 1997, City of Waterloo Council members unanimously approved the Waterloo West Side Trail System Masterplan Study as submitted by Planning & Engineering Initiatives Ltd. & Associates on behalf of the West Side Trails Project Committee. Council approved capital funding for the West Side Trails and Buffer Implementation in 1998.

Trail construction in the area started in 1998 to allow residents access to the natural areas, as well as to protect significant features. Every year, new sections are being added to the trail system. Over the next 17 years, the design and construction 52 kilometers of trails will result in the connection of three woodlots to various parks, shopping areas, and other neighbourhoods within Waterloo. The trails are designed for use in all seasons and interpretive signage along the trail system will provide users with an opportunity to learn about the natural features in the area. Rest nodes provide areas to sit and enjoy the surroundings.

The City of Waterloo is in the process of establishing a system of interpretive signage along with the trails. Currently four interpretive signs have been created and installed, which describe the local amphibians, the West Side bird species, the Waterloo moraine, and kettle holes. The City also plans to create educational trails that include ecology, geology, and wetland themes. For instance, the City, in conjunction with Dr. Alan Morgan of the University of Waterloo, is planning on creating a 4 kilometer Geological Time Trail, illustrating the last 4 billion years of the earth's history.

Information gathered on the forest habitat from watershed studies and monitoring programs confirmed the importance of protecting the interior forest system from development. Consequently, the majority of the 56 kilometers of trails are found along the buffers, within the subdivision, and along riparian zones. The limited amounts of trail crossings through the forest were analyzed through a detailed site reconnaissance to evaluate the impact of the proposed trail system on wildlife. This type of review has made it possible to ensure that the impact on forest interior is limited, particularly when considering forest birds and their required habitat.

West Side Waterloo is designed so that the natural environment can be preserved. The rolling hills, creek valleys, wetlands and forests are protected for the enjoyment of the City's residents and visitors and to safeguard the health of a diversity of sensitive plants and wildlife and the extensive groundwater system.

2.0 PROJECT CONTEXT

The proposed tertiary trail connection is situated in a naturalized buffer along the northwestern edge of the upland hardwood forest (ESPA #19), adjacent to single-detached housing properties. The trail extends approximately 190 metres in length, connecting an existing stonedust trail at Blue Beech Blvd to Park Block #297 at Red Osier Rd. Site specific design challenges include steep east-west slopes upwards of 30%, as well as the associated drainage obstacles and issues in the lowlands of the slope at the Red Osier Park Block connection.

3.0 PROPOSAL DESCRIPTION

The City of Waterloo is presently seeking Proposals from qualified and experienced Consultants who will:

- Explore a number of environmentally sensitive, creative, and economic design alternatives
- Devise the best possible trail route that connects each segment of the trail system
- Produce the accompanying construction drawings

3.1 Work Program

The Consultant is required to prepare a detailed Work Program that outlines the context of their proposed working process. The Work Program must identify the necessary tasks, personnel, time-lines and related budgets to address the Project components listed below:

- Conduct a detailed site analysis
- Conceptualize a sensitive, creative, and economic solution for the proposed trail connection
- Generate design and construction plans in AutoCAD at a suitable scale, as well as all necessary detail drawings
- Provide a digital file on a CD

4.0 SUBMISSION REQUIREMENTS

Proposals are not to exceed five (5) single-sided pages in length, excluding curricula vitae and other supporting documentation. Four (4) sealed copies of the Proposal (one unbound) are required. The Proposal should reflect an understanding of the project issues and concerns, opportunities and constraints, goals and objectives and should outline a method of approach. The Proposal should include, in addition to the information requested in the Request for Proposal, any further information that illustrates the Project Team's experience, expertise or special insight into the Project.

4.1 Project Schedule

A Project Schedule should be submitted identifying at what key intervals meetings with the staff will occur, also, showing the start and completion of major tasks in the Work Program, a timeline for the Project, and the members of the Project Team who will be involved.

It is expected that authorization to proceed with the Project and preparation of Consultant Agreement will be provided within four (4) to six (6) weeks of Proposal submissions.

4.2 Budget

A maximum upset limit for the Consultant fees is \$15,000, including all reimbursable expenses excluding Goods and Services Tax. The Consultant should provide a breakdown allocating costs to

the various components of the Project, as identified in the Project Schedule, including all deliverables, such as, plan drawings and construction estimates.

The Consultant shall submit the Fee for the Proposal in a separate sealed envelope so as to not influence the evaluation of the qualifications and the selection of the Consultant. An itemized cost estimate for all tasks identified, including costs for meetings, printing, travel, etc, should also be included in the package.

4.3 Project Reporting Relationship

The Consultant will carry out the Project under the direction of City of Waterloo. The Consultant will report to Karen Moyer, Special Projects Manager, Capital Projects and Services.

4.4 Project Team

The nature of this Project requires that it be led by a consulting team with a strong background in the design of environmentally sensitive landscapes.

The following information should be included as part of the Proposal submissions:

- Firm Experience: Project Team Leaders' experience in the design of sensitive landscapes, specifically environmentally sensitive trail design, during the previous ten years. The Consultant should demonstrate full capability in providing the aforementioned services. If sub-consultants will participate in the Project, identify the nature and extent of each sub-consultant's experience and participation.
- Project Team Personnel Experience: Identification and role of key personnel to be assigned to the Project and their background and experience. Be very specific in identifying the nature and the extent of each person's participation, and provide a Project Team organization chart.
- Project Approach: A detailed description of the Consultant's approach to the Project. The description shall convey the Project Team's basic understanding of the work to be accomplished.
- Time Commitment: Overall percentage of the total Project on a task-by-task basis that will be undertaken by the Project Team Leader and each Team member including per diem rates and estimated number of hours per task.
- Availability: A statement of the Consultant's ability to perform services within the required time of completion, along with an estimated time schedule.
- References: A minimum of three references for which the Consultant has provided similar work during the previous 3 to 5 years. If the Project Team includes sub-Consultants, please clearly state which firm was responsible for each specific project reference, and identify any previous projects that were jointly completed.
- Cost Estimate: An itemized cost estimate for all tasks identified, including costs for meetings, printing, travel, etc. The cost estimate is to be submitted in a separate envelope and not incorporated into the body of the Proposal so as to not influence the evaluation of the qualifications and the selection of the Consultant.

4.5 Proposal Evaluation and Selection of Consultant

Fee Proposals and Work Program will be reviewed and evaluated by November 17, 2006. A recommendation for the selection of the Consultant will be based on the following criteria:

- Clarity, comprehensiveness and completeness of the Proposal, including:
 - Understanding and approach to the Project
 - Deliverables – construction drawings and data in hard copy and digital format
 - Project Schedule
 - Cost effectiveness
- Creativity and innovation:
 - In the Project process
 - In the Project Approach
 - In past performance
- Relevant experience and qualifications of the Project Team:
 - Familiarity with existing information
 - Knowledge of the Project area
 - Support staff and disciplines

- Experience on similar projects
- Evaluation of proposed Project Team leadership and Project Team
- Firm's knowledge of the City
- Variety of disciplines in-house
- Amount of City work undertaken in the past
- References
- Past performance
- Cost proposed by the Project Team

4.6 Available Data

A number of documents, including The Environmental Lands Acquisition and Maintenance Policy are available for input to the Project. The Consultant should use the available background information to obtain an overview of the primary issues, site and existing opportunities/constraints that will impact the Project.

Resource materials will be available for review by appointment only. Inquiries related to this Project should be directed to Karen Moyer, Special Projects Manager, Capital Projects and Services.

4.7 Proposal Submission

Four (4) sealed copies of the Proposal (one unbound) should be submitted to:

Mr. John Miller
Director of Purchasing
Corporation of the City of Waterloo
Waterloo Service Centre
265 Lexington Court
Waterloo ON N2J 4A8

Proposal must be received no later than 2:00:00 PM Local Time Wednesday November 15 2006.

Facsimile transmissions will not be accepted.

Questions related to the intent of the Proposal are to be directed in writing or e-mail to:

Karen Moyer
Special Projects Manager, Capital Projects and Services
City of Waterloo,
Service Centre
265 Lexington Court,
Waterloo, Ontario N2J 4A8
Telephone: (519) 747-8609
Fax: (519) 886-5788
Email: kmoyer@city.waterloo.on.ca

Clarifications related to the submission process are to be directed in writing or e-mail to:

Mr. John Miller
Director of Purchasing
Telephone: 519-747-8616
Email: jmiller@city.waterloo.on.ca

At the close of the Proposal call, the City will examine all eligible Proposals. The City of Waterloo reserves the right to refuse any or all submissions and is not obligated to accept the lowest priced Proposal. It should also be noted that the City of Waterloo will review the Consultant Proposals based on the evaluation criteria and may elect to conduct interviews after completing this review. The Consultants to be interviewed will be contacted by phone and notified of the time and place for the interview, should one be required. Such a meeting would take place in the City of Waterloo and transportation to and from the meeting for the proponent's representatives will be at the expense of the proponent.

The City, at its sole discretion, may clarify any aspect of this Request for Proposal or any Proposal submitted by any proponent at any time. The City's right to clarify includes the right to request additional or missing information. The purpose of such clarification is to enable the City to determine whether the proponent's Proposal complied with the Request for Proposal. All discussions pursuant to the fore mentioned clarifications will be in writing in a form satisfactory for inclusion in the Proposal and satisfactory to the City.

Proponents will be responsible for visiting the sites. No allowance will be made by the City for failure by the proponent to carefully examine all conditions relating to the work. The proponent will ensure that all site work performed on City of Waterloo property complies with the requirements of the Occupational Health & Safety Act and the Corporation of the City of Waterloo Health and Safety Policies.

The Corporation of the City of Waterloo will make every effort to safeguard the confidentiality of each Proposal submission. However, all Proposal submissions are subject to the provisions of the Municipal Freedom of Information and Protection of Privacy Act.

An employee or Member of Council of the Corporation of the City of Waterloo will not have direct or indirect interest as a proponent.

The Consultant will prepare and enter into a Consultant Services agreement with the City of Waterloo that will include the work program, budget, and Project Schedule.

All work related to this Request for Proposal and materials supplied by proponents and any oral presentations to this Request for Proposal will be without cost to the City.