

**RFP 2024-09**

**REQUEST FOR PROPOSAL**

**PROFESSIONAL CONSULTING SERVICES  
LIGHTING, HOT WATER TANK & HVAC  
SYSTEM UPGRADES**

**VARIOUS SITES**

**SAULT STE. MARIE, ONTARIO**



January 25, 2024

**SUBJECT: RFP 2024-09**  
**PROFESSIONAL CONSULTING SERVICES**  
**LIGHTING, HOT WATER TANK & HVAC SYSTEM UPGRADES**  
**VARIOUS SITES**  
**SAULT STE. MARIE, ONTARIO**

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*The Sault Ste. Marie Housing Corporation – Housing Services (the Owner)* invites Professional Consulting services to submit a proposal for the above-referenced project in accordance with the enclosed terms and conditions.

In order to be considered, all proposals must be received by the *Sault Ste. Marie Housing Corporation*, 180 Brock Street, Sault Ste. Marie, ON P6A 3B7, no later than **February 8, 2024** at **12:00 NN**

Please complete the proposal form completed, signed, and returned as part of the Proposal in a sealed envelope (marked “**PROPOSAL SUBMISSION**”) along with the attached Appendix ‘A’.

The lowest or any proposal will not necessarily be accepted.

Yours truly,

Jeff Barban,  
Director of Housing Services

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**1.0 Scope of Work**

1.1 The Sault Ste. Marie Housing Corporation (SSMHC) is requesting for proposals for the provision of Professional Consulting Services for the design and preparation of drawings and specifications required to tender and complete contract for three (3) system upgrade projects:

1.1.1 Lighting System Upgrades.

1.1.2 Hot Water Tank System Upgrades.

1.1.3 HVAC System Upgrade.

**2.0 Timelines**

2.1 RFP Closing due: **Thursday, February 8, 2024 at 12:00 noon.**

2.2 Issue for Tender Implementation Documents for owner review due:

**-To be determined**

**3.0 Site Locations**

3.1 Lighting System Upgrade:

- 49 St. Mary's, Sault Ste. Marie, ON.

3.2 Hot Water Tank System Upgrade:

- Brien, Poplar, & McNabb Sault Ste. Marie, ON.

Bachelor – 26 units  
1 Bedroom – 12 units  
2 Bedroom – 1 unit

3.3 HVAC System Upgrade:

- 393 Dovercourt Sault Ste. Marie, ON.

**4.0 Access to Site & Inquiries**

4.1 Bidders may obtain access to the site and address all inquiries to:

**Jashar Rosauro**  
**Infrastructure & Asset Manager**  
Social Services – Housing Services  
180 Brock Street, P.O. Box 277  
Sault Ste. Marie, ON P6A 5L8  
Cell: (705) 989-2286  
[j.rosauro@socialservices-ssmd.ca](mailto:j.rosauro@socialservices-ssmd.ca)

4.2 Clarifications and or revisions will be issued to bidders by Addendum prior to bid closing.

**5.0     Role of Professional Consulting Firm**

- 5.1     The successful Professional Consulting firm will act in the role of an engineer and will provide services as per Ontario's regulatory body for engineers' standard short form of contract for Engineer's Services.

**6.0     Role of the Owner**

- 6.1     The SSMHC will administer the contract and will not approve any additional costs unless a design change is requested where additional site visits would be warranted.

**7.0     Proposal Submission**

- 7.1     The Proponent shall:
- 7.1.1     Complete and fully execute the Submission Form supplied and all appendices in all respects with appropriate documents and all requisite information.
  - 7.1.2     The Proposal and any amendments thereto may not be submitted orally or by telecommunications which include but are not limited to electronic email and telephone transmission of facsimiles.
  - 7.1.3     The fixed rate fee shall be based on the general design, expected project oversight including associated costs and must include all printing, copying, delivery, communication and travel costs. The fixed rate based fee shall be recorded in ink or typed except for signature of the bidder which shall be written with ink. Proposals that are incomplete or contain any omission, erasure, alteration, addition, condition, limitation or that show any irregularity may be rejected.
  - 7.1.4     The proposal shall be properly signed and the complete address of the bidder shall be given on the proposal. If the proponent is a co- partnership, each member shall sign the proposal; if a corporation, it shall execute the proposal by its duly authorized officers.
  - 7.1.5     The bidder shall include all schedules, and other information specified to enable the SSMHC to determine the proponent's compliance with the requirements of the Contract Documents. In the event work cannot be completed in accordance with the specified requirements, the proponent shall clearly and explicitly state what the deviations are.
  - 7.1.6     Upon request, a proponent shall verify any information including percentage contained in their proposal, and any proposal may be rejected if the SSMHC is not satisfied with the information furnished.
  - 7.1.7     The submission of a proposal shall indicate the acceptance by the proponent of all instructions and conditions contained in the Contract Documents and the proposal shall be a firm offer binding the proponent.
  - 7.1.8     Proposals shall not be withdrawn or modified and shall be open to acceptance by the SSMHC for a period of **thirty (30)** days following the date for the receipt of proposals. The fixed rate quoted therein shall be Firm which shall remain valid and binding on the proponent in the event the proposal is accepted by the SSMHC.
  - 7.1.9     The SSMHC reserves the right to amend or supplement the Contract Documents at any time prior to the established closing date. Additional information, changes, clarifications or corrections made by the SSMHC or Professional Consulting firm on

SSMHC's behalf to the Contract Documents during the time of bidding shall be issued in the form of addenda which will become part of the Contract and shall be covered in the proposal price. The proponent shall acknowledge receipt of these addenda in the space provided in the proposal forms.

- 7.1.10 The proponent is advised that the SSMHC will not reimburse the bidder for any costs incurred in preparation of a proposal

## **8.0 Phase of Work**

### **8.1 Initial Assessment**

Review the characteristics of the existing site, building layout, existing deficiencies with the SSMHC including but not limited to: field measurement and verification of all dimensions of the subject site, including review of existing system for the proposed work.

#### **8.1.1 Lighting System Upgrade**

- 8.1.1.1 Conduct a thorough assessment of the existing lighting system including energy consumption, lighting design, and existing technology in use to identify opportunities for energy efficiency improvements.
- 8.1.1.2 Establish with the SSMHC the approach to the design of the project and the type of contract to be utilized.
- 8.1.1.3 Identify requirements within applicable statutes, regulations, codes and by-laws and where necessary review with Authorities having jurisdiction.
- 8.1.1.4 Based on a mutually agreed upon program of requirements, provide detailed proposal for energy-efficient lighting solutions, including the adoption of LED technology, lighting controls, and motion sensors.
- 8.1.1.5 Prepare for the SSMHC's review and approval of technical design concepts.
- 8.1.1.6 Allow for all meetings with the SSMHC and required site visits to obtain and finalize the technical design.
- 8.1.1.7 Submit a cost estimate (+/- 8%) for the project. Estimate format shall be by divisional breakdown.

#### **8.1.2 Hot Water Tank Upgrade**

- 8.1.2.1 Conduct a comprehensive assessment of the existing hot water tank system, identifying inefficiencies and areas for improvement.
- 8.1.2.2 Establish with the SSMHC the approach to the design of the project and the type of contract to be utilized.
- 8.1.2.3 Identify requirements within applicable statutes, regulations, codes and by-laws and where necessary review with Authorities having jurisdiction.
- 8.1.2.4 Provide recommendations for energy-efficient upgrades, including installation of new hot water tanks, improved insulations, and any other relevant enhancements.
- 8.1.2.5 Prepare for the SSMHC's review and approval of technical design concepts.

- 8.1.2.6 Allow for all meetings with the SSMHC and required site visits to obtain and finalize the technical design.
- 8.1.2.7 Submit a cost estimate (+/- 8%) for the project. Estimate format shall be by divisional breakdown.

**Note: If the current electrical system allows for the proposed enhancement, we shall proceed to the subsequent phase of the project.**

### **8.1.3 HVAC System Upgrade**

- 8.1.3.1 Conduct a thorough evaluation of the existing HVAC system, including equipment condition and energy efficiency levels.
- 8.1.3.2 Establish with the SSMHC the approach to the design of the project and the type of contract to be utilized.
- 8.1.3.3 Identify requirements within applicable statutes, regulations, codes and by-laws and where necessary review with Authorities having jurisdiction.
- 8.1.3.4 Recommend suitable HVAC equipment based on the analysis, considering factors like efficiency ratings, capacity, and compatibility with existing infrastructure.
- 8.1.3.5 Prepare for the SSMHC's review and approval of technical design concepts.
- 8.1.3.6 Allow for all meetings with the SSMHC and required site visits to obtain and finalize the design.
- 8.1.3.7 Submit a cost estimate (+/- 8%) for the project. Estimate format shall be by divisional breakdown.

## **8.2 Design Development**

- 8.2.1 Prepare for SSMHC's review and approval, design development documents to describe the size and character of the project including electrical, mechanical, materials and other such elements as may be appropriate; and continue to identify requirements within applicable statutes, regulations, codes and by-laws as the project advances.

## **8.3 Implementation Documents**

- 8.3.1 Prepare for SSMHC's review and approval, **tender-ready** documents consisting of technical drawings, specifications and schematics to describe in detail the requirements for system implementation.
- 8.3.2 Review and finalize requirements within applicable statutes, regulations and codes and by-laws that are applicable to the project and where necessary review with Authorities having jurisdiction in order that the SSMHC will be in a position to apply to the project: and establish with the SSMHC, the necessary submittal information, submission forms and conditions of the construction contract.
- 8.3.3 Submit one (1) set of printed documents including stamped drawings at 100% stage for review and approval. Upon approval, provide SSMHC with electronic copies of specifications and drawings. Specifications are to be *Microsoft Word* format (version 2016 or previous) and drawings are to be *AutoCAD* format (version 2020 or previous). **These electronic copies must be provided prior to final payment being approved.**

- 8.3.4 Specifications are to be formatted for 8 ½" x 11" format and drawings are to be for 24" x 36" format.

**8.4 Tendering And Contract Administration:**

- 8.4.1 Assist the SSMHC to respond to Contractor inquiries during tender period. Tenders will be opened at the *Sault Ste. Marie Housing Corporation* office at 180 Brock Street.
- 8.4.2 Attend mandatory pre-site meeting for Contractors bidding the work.
- 8.4.3 The Professional Consulting firm shall be responsible during the bidding period for responding to all inquiries and for the preparation of required addenda. The Professional Consulting firm shall prepare the addenda and submit to SSMHC for approval and distribution.
- 8.4.4 Assist SSMHC to analyze, evaluate submissions and provide award recommendation.
- 8.4.5 The Professional Consulting firm shall verify completeness of the bids including reviews for compliance with the provisions of the Tender documents. The Professional Consulting firm shall maintain strict confidentiality regarding the bids and shall make its confidential recommendations directly to the SSMHC. The SSMHC shall award the construction contract and shall be solely responsible for all announcements and awards.

**8.5 Implementation Phase**

- 8.5.1 Be a representative of the SSMHC advice and consult with SSMHC representatives and forward SSMHC instructions to the Contractor.
- 8.5.2 Assist SSMHC in obtaining a building permit.
- 8.5.3 Request and review shop drawings for conformance with general design concept as provided for in the contract documents.
- 8.5.4 Issue supplemental instructions (Site Instructions, CCNs, and minutes of site meetings), prepare Contemplated Change Notices (CCN) and furnish the SSMHC with estimate of costs of change at time of issue of CCN to the Contractor. Professional consulting firm shall provide appropriate documentation to support recommendation.
- 8.5.5 Review Contractor's response to contemplated change notices, and provide recommendation for approval.
- 8.5.6 Review Contractor's progress draw application for certificate of payment and provide recommendation for approval/payments.
- 8.5.7 Issue certificates for payment to Owner.
- 8.5.8 Act as the Engineering firm under CCDC 2 (2020).
- 8.5.9 Review procedures and oversee substantial completion.
- 8.5.10 Provide a bi-weekly general review to all construction: examine, evaluate and report to the SSMHC on representative samples of work; keep you informed of the progress and quality of work; report to the SSMHC any defects and deficiencies in the work including adherence to health and safety requirements by contractor ; prepare and issue corresponding site visit reports.



**8.6      Phase 4 - Close-out**

- 8.6.1      Issue declaration of substantial completion under CCDC 2 terms and conditions.
- 8.6.2      Request as-built drawings, data books, warranties, operation and maintenance manuals, etc. from the Contractor and shall be reviewed by the Professional Consulting firm for accuracy prior to submitting to the SSMHC.
- 8.6.3      Prepare and submit a complete set of the electronic version of record drawings and specifications. **These electronic copies must be provided prior to final payment being approved.**
- 8.6.4      Conduct a final inspection on the works for substantial completion and prepare a deficiency report. Allow a minimum of one (1) final inspection and a minimum of one (1) deficiency follow-up inspection.
- 8.6.5      Attend, review and provide guidance to the general contractor for all of the commissioning activities.
- 8.6.6      Review any defects or deficiencies that are reported by the SSMHC during the warranty period and notify the Contractor of those items requiring attention.
- 8.6.7      Allow for a one-year warranty review with an accompanied written report.
- 8.6.8      Coordinate total completion of the contract and validate total completion performance.

**9.0      Proposal Submission Requirements**

- 9.1      Professional Consulting firms proposal must be received before **12:00 noon on Thursday, February 8, 2024** at the following location:

***Sault Ste. Marie Housing Corporation***  
HOUSING SERVICES  
180 Brock Street, P.O. Box 277  
Sault Ste. Marie, ON P6A 5L8

- 9.2      Your proposal must include the following information:
  - 9.2.1      **A fixed rate fee based on the design and all associated costs, all cost incurred due the responsibilities as consultant/engineer with anticipated project schedule factored in, inclusive of all costs to complete the services described above.**
  - 9.2.2      A commitment to meet the referenced targeted milestone dates.
  - 9.2.3      All required site visits required for design and construction inspections will be part of the percentage based fee with no minimum number of visits required. Exception will be made if the SSMHC requests a design change where additional site visits would be required.
  - 9.2.4      Demonstrate previous experience in similar projects.
- 9.3      The SSMHC reserves the right to:
  - 9.3.1      Reject any and all proposals.
  - 9.3.2      Cancel this RFP either before or after submission deadline.

9.3.3 Waive any minor irregularities in any proposal.

9.3.4 Negotiate for the modifications of any proposal.

9.3.5 The SSMHC reserves the right without liability, cost or penalty, in its sole discretion to disqualify any proposal before full evaluation if the proposal reveals incorrect information or the Architectural firm misrepresents any information provided in its proposal.

9.4 Payment Terms

9.4.1 The Professional Consulting firm shall submit separate invoices to the SSMHC in accordance with this agreement.

9.4.2 The SSMHC will pay any approved invoice submitted by the Professional Consulting firm under this agreement within **thirty (30)** days after the invoice approval date.

9.5 Alterations to Documents

9.5.1 No electronic reproduction or alteration of the original Proposal will be permitted under any circumstance. The Proponent shall not change the wording of the Proposal after submission. No words or comments shall be added to the general conditions or detailed specifications unless requested by the SSMHC for the purpose of clarification.

9.6 Insurance Policy and Certificate

9.6.1 The successful Proponent will indemnify and save harmless the SSMHC of any action arising out of the course of this Agreement and will provide a Certificate of Insurance certifying Commercial General Liability and Property Damage Insurance up to and including **\$5,000,000.00**, prior to the commencement of the contract. The successful Proponent shall maintain such insurance as will protect the Proponent and the SSMHC from all claims for damage or loss, or personal and bodily injury, including death, and from all claims of property damage on an occurrence basis which may arise from their operation under this contract. The insurance shall be Comprehensive General Liability Insurance, including Product and Completed Operations Liability, Contractual Liability, SSMHCs and/or Contractors Protective Liability, Contingent Employers Liability, and shall contain a Cross Liability Clause protecting the SSMHC as if separately insured. The insurance shall have a limit of not less than **\$5,000,000.00** inclusive for any one occurrence.

9.6.2 The deductible amount or amount in any insurance policy required by the SSMHC pursuant to this contract shall be subject to the approval of the SSMHC. In the event that the SSMHC does not accept the deductible amount as proposed by the Contractor, the Contractor shall provide insurance coverage with a deductible amount acceptable to the SSMHC.

9.7 Indemnity

9.7.1 The successful Proponent will indemnify and save harmless the SSMHC against and from all actions, causes of action, interest, claims, demands, costs, damages, expenses or loss which the SSMHC may bear, suffer,

incur, become liable for or be put to by reason of any damage to property to injury or death to persons by reason of, arising out of or in consequence of breach, violation of non-performance by the successful Proponent of any provision of the Agreement, or by reason of or arising out of the work covered by this contract, or by reason of or arising

out of any act, neglect or default by the successful Proponent or any of its agents or employees. The rights to indemnity contained in this paragraph shall survive any termination of this Agreement, anything in this Agreement to the contrary notwithstanding.

**10.0 Bid Acceptance**

- 10.1 **The lowest of any bid will not necessarily be accepted.** The SSMHC reserves the right without prejudice to reject any or all Proposals and to determine in its own best judgement the Proponent best qualified to undertake this Contract.
- 10.2 If the Consultant that is awarded the work cannot complete the work as specified, it is at the sole discretion of the SSMHC to issue remainder of work to the Consultant of its choice.
- 10.3 The SSMHC reserves the right to award the Contract in whole or in part.

**PROPOSAL SUBMISSION FORM – PROFESSIONAL CONSULTING SERVICES (RFP 2024-09)**

I/We the undersigned, hereby submit the attached Proposal to satisfy the requirements outlined and have reviewed and understand the scope of work and agree to the terms and conditions contained therein in submitting this Proposal.

I/We agree that this Proposal is made without any connection, knowledge, comparison of figures or arrangements with any other person or persons submitting a Proposal for the same purpose and is in all respects fair and without collusion or fraud.

It is further understood and agreed that the lowest or any Proposal will not necessarily be accepted and that the SSMHC reserves the right in its absolute discretion to reject any or all Proposals, or accept the Proposal deemed most acceptable.

The SSMHC further reserves the right to negotiate further with the successful Proponent to finalize the terms and conditions of the Proposal.

This "Proposal Submission Form" must be completed, signed, and returned as part of the Proposal in a sealed envelope (marked "**PROPOSAL SUBMISSION**") along with the attached Appendix to our office by **12:00 nn on Thursday, February 8, 2024** to be considered.

Fixed Fee: Lighting System Upgrade	\$ _____
Hot Water Tank System Upgrade	\$ _____
HVAC System Upgrade	\$ _____

We commit to meet the referenced targeted milestone dates.

DATED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_

NAME OF FIRM: \_\_\_\_\_

AUTHORIZED SIGNING OFFICER: \_\_\_\_\_

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

WITNESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ POSTAL CODE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

**APPENDIX “A”**

Proponents are required to complete Appendix “A” giving a brief description of their company and a list of recently completed projects of this nature complete with references from owners or businesses involved in the installations. Include a brief business prospectus with this submission.

Proposal Award will be made on the basis of verified acceptable references, completed projects, and proposal price, notwithstanding the SSMHC's right to reject any or all of the submitted proposal.

**COMPANY NAME:** \_\_\_\_\_

**BRIEF DESCRIPTION:** \_\_\_\_\_

**PROJECT:**  
(Include Location & Date Completed)

**REFERENCES:**

**SSMHC:**  
(Include Name & Address)

## LIGHTING, HOT WATER TANK, & HVAC SYSTEM UPGRADES – VARIOUS SITES

### Evaluation Scoring

Score	Description
<b>9-Excellent</b>	<i>Exceeds requirements in areas beneficial to owner – ie. Time/Cost savings</i>
<b>8-Very Good</b>	<i>Exceeds requirements but not particularly beneficial to owner</i>
<b>7-Good</b>	<i>Fully meets criterion requirements</i>
<b>6-Above Average</b>	<i>Fully meets requirements of criterion. May lack in non critical areas</i>
<b>5-Average</b>	<i>Meets requirements but to a minimum standard</i>
<b>4-Below Average</b>	<i>Addresses most but not all criterion</i>
<b>3-Poor</b>	<i>Barely meets most criterion. Lacking in some critical areas</i>
<b>2-Very Poor</b>	<i>Lacking in most critical areas</i>
<b>1-Completely Deficient</b>	<i>Does not satisfy any requirements and/or significant errors present</i>

### Evaluation Weighting

Item	Criterion	Value
<b>9.1</b>	<b>Approach to Project</b>	<b>15</b>
<b>9.2</b>	<b>Experience Record</b>	<b>10</b>
<b>9.3</b>	<b>Project Team</b>	<b>10</b>
<b>9.4</b>	<b>Fixed Fee</b>	<b>50</b>
<b>9.5</b>	<b>Hourly Rates-Added fees not included in fixed fees- /hr</b>	<b>15</b>
<b>TOTAL</b>		<b>100%</b>

To assist you in the evaluation and scoring of the Proponents we have summarized the definition of each criterion. We have included examples of ‘best’ response to aid in achieving the highest possible score (9).

<b>9.1</b>	<b>Approach to Project</b>	<b>15</b>
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Through discussion, the proponent should demonstrate knowledge of method, materials, processes and techniques used in this build application. Demonstration of time/cost savings to any or all of these applications would achieve a high score within this criterion.

<b>9.2</b>	<b>Experience Record</b>	<b>10</b>
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Provide up to (5) projects delivered similar in scope. Proponents are to provide a matrix detailing team member’s experience and involvement on similar projects. High scores in this criterion would reflect a team with significant and detailed experience clearly related to the scope of work on this project. References would be a distinct asset.

<b>9.3</b>	<b>Project Team</b>	<b>10</b>
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Each Proponent will prepare an outline of the staff and design team. An organization chart with team members’ name and position identified should be included. Scores will dependent upon the experience and qualifications outlined as well as the time dedicated by each staff member to this project.

## LIGHTING, HOT WATER TANK, & HVAC SYSTEM UPGRADES – VARIOUS SITES

<b>9.4</b>	<b>Fixed Fee</b>	<b>50</b>
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Each Proponent shall provide a fixed fee proposal. The fixed fee shall detail all costs covered in this fee. This should be detailed to hours covered for site visits, weekly meetings and incidentals covered in the set fee including drawings, design and any other incidental.

High score will be contingent not only on low bid but also the details of services, hours covered and allotted for within the fee provided.

<b>9.5</b>	<b>Hourly Rates-Added fees not included in fixed fees- /hr</b>	<b>15</b>
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Each proponent shall provide an hourly or flat fee for services above and beyond those included in the original bid. High scores will be awarded to not only lowest rates but also the details in which extra fees would apply. Provide a detailed matrix outlining these fees within your bid.