

# REQUEST FOR PROPOSAL

## Sanitary Sewer Force Main Repairs

RFP 5330-03-1017

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The Resort Municipality of Whistler | January 2024

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Issued:	January 16, 2024
Closing Date Time:	2:00 p.m. February 5, 2024
Closing Location:	<a href="mailto:engineerbids@whistler.ca">engineerbids@whistler.ca</a>
Project Manager:	Chelsey Roberts

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## 1 Introduction

The Resort Municipality of Whistler (RMOW) is inviting qualified engineering consultant Proponents to provide proposals for design, tendering, contract administration and construction inspection services for the replacement and upgrades of the header to the Crabapple sewer lift station and nearby sewer force main fittings. The sewer force main section had a temporary leak repair completed by a contractor in the fall of 2023.

It is the intention of the RMOW to ensure Whistler's sewer systems meet all applicable standards and are maintained in a manner that is cost-effective, ensures reliability and minimizes or eliminates environmental impacts.

### 1.2 Background

The RMOW has approximately 31 sanitary sewer lift stations which use pressure class piping force mains to move sanitary sewage at low points to high points into enclosed gravity pipe to move the wastewater along the collections system to the WWTP. The RMOW has identified the following force main sections for repair:

1. Sewer force main located at Crabapple sewer lift station (asset ID S103).
  - leak repair completed in October 2023 on the station discharge header buried underground immediately outside of the wet well.
    - It has been determined the leak was caused from too much deflection of the prefabricated discharge header pipe connected to the wet well isolation valve, causing the valve flange to fracture. The deflection on the discharge header may be from ground movement causing the header to roll at other couplers or sink.
    - Photos of the repair can be found in Attachment 2 – Repair photos 2023.
  - Inspection and assessment of fittings along sewer force main from Crabapple Sewer Lift Station to Cedar Drive.

## 2 Project Specific Requirements

### 2.1 Scope of Work

The RMOW identified the following scope of work for the project:

- Inspection and assessment of fittings along sewer force main from Crabapple Sewer Lift Station to Cedar Drive.

- Sewer force main discharge header replacement located at Crabapple sewer lift station (asset ID S103).
- Conceptual bypass plans for the repair.

The following section provides an overview of the scope and deliverables to be provided as part of this project.

## 1. Project Initiation and Site Investigation Phase

### 1.1. Project Kick-off Meeting:

- The Consultant shall meet with the RMOW stakeholders to review and confirm the scope of services, deliverables, and schedule.
- As part of the project kick-off meeting, the Proponent shall provide an indication of risks to the project in terms of schedule, budget, and equipment availability.

### 1.2. Data Collection:

- Prepare a list of document requirements to be provided by the RMOW.
- Review all relevant plans, reports, and records provided by the RMOW.

### 1.3. Site Investigation and Inventory:

- Conduct site investigations to review and document existing conditions.
- Geotechnical investigation and topographic survey (as required).
- Confirm and pre locate all existing site services.

### 1.4. Project Meetings:

- Attend weekly project meetings with RMOW project manager.

## 2. Request for Quotation for Inspection

- Prepare a Request for Quotation for the inspection of the valves and fitting highlighted in attachment 1, and listed below:
  - 300mm 45 Deg. Wye & valve and fitting assembly located in the access driveway to Crabapple Sewer lift stn.
  - 300mm 45 Deg. Bend Located in the access driveway to Crabapple Sewer lift stn.
  - 300mm 45 Deg. Bends Located Locally out front of Crabapple Sewer lift stn. on shoulder of Crabapple Dr.
- Provide addendums during quotation period as required.
- Review submissions and provide a recommendation.
- Assemble agreement between contractor and RMOW.

- Providing onsite, full time field supervision of all construction activities.
- Complete inspection of valves and fittings and provide recommendations.

### **3. Conceptual bypass plan**

- Prepare conceptual sewer bypass plans the repairs.
- Prepare Class C Cost Estimate for works associated with conceptual bypass including contingency as per ACEC guidelines (-25% / +40%).
- Attend review meeting to provide overview of design and solicit feedback from RMOW project team on conceptual bypass design.

### **4. Preliminary Design Phase**

- Prepare Preliminary Design Drawings (75%) for the sewer force main repair.
- Update Cost Estimate to Class B stage for works associated with the preliminary design including contingency as per ACEC guidelines (-15% / +25%).
- Update preliminary construction schedule based on new information received during preliminary design phase.
- Submit Preliminary Design Drawings, Cost Estimate, and Construction Schedule for review by the RMOW.
- Attend review meeting to provide overview of design and solicit feedback from RMOW project team.
- Update Preliminary Design Package based on feedback from RMOW project team and submit final version.

### **5. Detail Design Phase**

- Prepare Detailed Design Drawings (95%) for the sewer force main repair.
- Prepare Draft Tender Package including all detailed specifications for inclusion in the tender package.
- Prepare front end tender documents to RMOW standards (template and RMOW specific clauses to be provided by RMOW) including:
  - Draft construction milestone schedule.
  - Schedule of quantities and payment terms.
- Update Cost Estimate to Class A stage for works associated with the detailed design including contingency as per ACEC guidelines (-5% / +10%).
- Update preliminary construction schedule based on new information received during detailed design phase.

- Submit Detailed Design Drawings, Specifications, Cost Estimate, and Construction Schedule for review by the RMOW.
- Attend review meeting to provide overview of design and solicit feedback from RMOW project team.
- Update Detailed Design Package based on feedback from RMOW project team and submit final tender ready version.

## **6. Tender Services**

- Prepare signed and sealed drawings and specifications for integration into the tender package.
- Prepare final tender package including all supporting documentation as required to post the tender package.
- Assist RMOW with outreach to contractors and vendors to provide notice that tender package is being posted.
- Attend tender walkthrough with bidders during tender process.
- Prepare addendums and provide responses to questions during the tender period.
- Review tender submissions and provide recommendation for award.
- Meet with RMOW project team to review bids.
- Prepare final contract document for execution by successful bidder.

## **7. Engineering and Contract Administration Services During Construction**

### *7.1. Contract Administration Services:*

- Host construction kick-off meeting.
- Maintaining the construction schedule with feedback from the Contractor.
- Liaising between the Contractor and the RMOW Project Manager for access, coordination, and reviews with RMOW utility and operations staff.
- Providing onsite, full time field supervision of all construction activities.
  - Assume 6 weeks for construction.
- Reviewing Contractor submitted progress draws and certifying payment of Contractor invoices.
- Coordinating, attending, and chairing weekly construction meetings.
- Reviewing change requests and issuing Contemplated Change Orders and Change Orders.
- Reviewing and directing RFI's and other field correspondence to the relevant parties.



- Reviewing claims for substantial performance.
- Review final deficiencies and coordinate remediation with the Contractor.

*7.2. Engineering Services:*

- Prepare Signed and Sealed Issued for Construction drawings.
- Review any technical submissions from Contractors including sanitary bypass plans, etc.
- Review shop drawings.
- Review RFI's and field questions.
- Prepare design details to support any contemplated change orders where required.
- Perform ongoing field reviews as required.
- Perform deficiency review.
- Prepare detailed deficiency list as required.
- Perform substantial performance review.

**8. Project Closeout Phase**

During the post construction phase, the Proponent shall perform, but not limited to the following task for the project:

- Prepare and submit completed record drawings.
- Update the RMOW Capital Asset Log.
- Complete final inspection of all works. Following final inspection, promptly issue a list of all deficiencies and what is required to remedy the work.
- Certify Substantial and Total Completion of the contract.
- Provide follow up for final resolution of all warranty work.

**Cost Estimate**

During each phase of the projects listed above provide Class A, B and C cost estimates as per ACEC guidelines.

<https://www.egbc.ca/getmedia/eced45f4-eb37-4fb2-bee9-ce5fc3288c45/ACEC-BC-Budget-Guidelines-Building-Projects-2009.pdf.aspx>

**2.2 Project Deliverables**

The project deliverables will include, but are not limited to the following:

- A detailed schedule that describes all the tasks required to complete the project. Updates to the schedule shall be provided as the design package is developed.
- Conceptual bypass plan, and Class C cost estimate.
- 75%, and 95% design drawings in a compatible format determined by the RMOW, as per feedback received at design review meeting.
- Class C, B and A cost estimates.
- A technical memo describing the findings from the investigation and a recommendation.
- Project Specification and IFC drawings that will be included in the tender package.
- A draft and final tender package.
- A draft and final Request for Quotation package.
- Addendums that are required during the Request for Quotation and tender phase.
- A letter of recommendation for tender award and Request for Quotation after completing a thorough review and evaluation of the Request for Quotation packages and tender packages.
- Quality Assurance Plan for the construction scope of the project to confirm the Contractor builds quality into the work and ensure any required quality control and quality assurance tests are performed and appropriate documentation is generated and submitted.
- Project meeting minutes to be emailed to all identified representatives/stakeholders.
- Weekly construction inspection reports during construction.
- As-constructed drawings associated with the completion of the project.

### 2.3 Available Resources

RMOW will provide the following information:

- Attachment 1 - Record drawings
- Attachment 2 – Repair photos 2023

### 2.4 Timeline

A timeline with the below milestone dates are desired. Please provide the earliest feasible milestone dates in your submission.

<b>Deliverable</b>	<b>Milestone Dates</b>
Award contract	February 19, 2024
Request for Quotation	March 22, 2024
Site inspection of valves and fittings	Spring 2024
Conceptual bypass plan with Class C Cost Estimate	June 2024
Preliminary Design (75%) with Class B Cost Estimate	June 2024
Detailed Design (95%) with Class A Cost Estimate	August 2024
Draft tender documents	September 2024
Proposed construction period	Spring/Summer 2025

### 3 Proponent Response

#### 3.1 Proposal Format

The following format, sequence, and instructions shall be followed in order to provide consistency in Proponent response, and ensure each proposal receives full consideration:

- Total electronic individual file size shall be less than 9MB.
- All pages shall be consecutively numbered;
- An unaltered and completed Form of Proposal as the cover page;
- Table of contents;
- The proposal sections as detailed below.

#### 3.2 Executive Summary

Shall be a high level, concise summary of project understanding and overall proposal contents.

### 3.3 Proposed Work Plan

Proposals shall include a Work Breakdown Structure (WBS) or similar project management based and deliverable-oriented breakdown that will be used to define the work plan. The work plan will detail an approach/strategy and methodology to meet the objectives and will demonstrate the strength and ability to perform the Services requested. The work plan shall indicate what team members will be performing each task.

### 3.4 Timeline

Proposals must include a detailed proposed project timeline based on the work plan for completion of all work and submission of all required deliverables and milestone dates. Provide a proposed start date, the total number of days required to complete each deliverable or stage of work, and a completion date.

### 3.5 Proposed Costs

Proposals shall provide a total cost to complete the work effort including a cost breakdown of the total cost for each of the components described in the Scope of Work (SOW).

Additionally, Proponents shall include a fee schedule which includes the hourly rates of each individual and job type that will be working on the project, the anticipated hours to be spent on each task, subtotals for each task and total costs for the individuals and job type.

If the submitting Proponent has an existing executed master services agreement with the RMOW, the hourly rates shall match the rates agreed upon in the executed master services agreement.

### 3.6 Proponent Qualifications

Proposals shall include a description of the Proponent (The Firm/Company) and the Proponent's team members qualifications that demonstrate the ability to undertake the proposed project. Resumes shall be included for the Proponent's team leaders and all personnel to be used in carrying out the various components of a project, including sub-consultants and sub contractors. Resumes shall emphasize skills that are relevant to the SOW of the project. Previous project work shall include completion dates. Note that prior to any proponent member being changed during the evaluation or post bid process, resumes must be submitted for approval to the RMOW.

### 3.7 Summary of Related Experience

The proposal shall contain at least two (2) specific project examples that the Proponent has completed but no more than three (3) project examples completed in the past ten (10) years that demonstrate the Proponent and the Proponent's team member's ability to undertake the proposed project. A sample of the work completed on the project examples can be included as a Proposal Appendix. Descriptions of previous projects shall be relevant and related to the proposed project and dated and the proponents

team members shall have been involved on the project examples. Descriptions of previous projects shall include at a minimum:

- 1) Name of the project;
- 2) Start and completion dates;
- 3) Key individuals involved; and
- 4) Two client references.

### 3.8 Addenda

The proposal shall acknowledge that they have read and understood all addenda posted by indicating in the Form of Proposal.

## 4 Project Brief

This is a Request for Proposal (RFP) and is not a contract tender call. No contractual, tort or other legal obligations are created or imposed on the RMOW by this RFP or by submission of any proposal or by consideration of, or failure or refusal to, consider any proposal by the RMOW. Further, the Contract, when executed, is the sole source of any contractual obligation on the RMOW with respect to the project.

Throughout this document reference is made to the “Proponent” as the entity preparing the response to the RFP. The term “Consultant” is used to represent the Proponent after the Contract is signed. The “Preferred Proponent” is the Proponent judged to have the “best overall proposal” based on the evaluation score outlined in Section 7 Evaluation and Selection, which will be selected to enter into negotiations leading to a Contract with the RMOW. If negotiations are unsuccessful, the next highest rated Proponent may be deemed to be the Preferred Proponent and negotiations would be commenced with them.

### 4.1 Submission & Award

The Proposal shall be submitted via email to the RMOW at:

Name: Chelsey Roberts

Email: [engineerbids@whistler.ca](mailto:engineerbids@whistler.ca)

The **proposal shall be submitted** with the price quoted in \$CDN for each item defined in the Specific Project Requirements (SPR) **on or before: February 5, 2024, at 2:00 pm.**

Following the closing date, the RMOW intends to provide the **Notification of Award** for the contract to the preferred Proponent **on or before 60 days from the closing day** as noted in section 4.4 Duration of Proposal: **April 5, 2024.**

## 4.2 Inquiries

All inquiries related to this RFP shall be directed in writing (by email) to:

Name: Chelsey Roberts

Email: [croberts@whistler.ca](mailto:croberts@whistler.ca)

And

Name: Scott Morphet

Email: [scmorphet@whistler.ca](mailto:scmorphet@whistler.ca)

Please clearly identify the RFP number and title when submitting a question.

## 4.3 Addenda

The final day for questions is 3 business days before the closing date. If the RMOW determines that an amendment is required to this RFP, the RMOW will post the amendment on the RMOW and BC Bid web sites no less than 1 calendar days prior to closing.

## 4.4 Duration of Proposal

The Proposal will be irrevocable and open for acceptance by the RMOW for a period of 60 calendar days from the day following the closing date, even if the Proposal of another Proponent is accepted by the owner.

## 4.5 No Contract

This RFP is an invitation for Proposals (including prices and terms) for the convenience of all parties. It is not a tender and no obligation of any kind will arise from this RFP or the submission of a Proposal. The RMOW may negotiate changes to any terms of a Proposal, including prices; and may negotiate with one or more Proponents, or may at any time invite or permit the submission of a Proposal (including prices and terms) from other parties who have not submitted Proposals before the closing date.

## 4.6 Acceptance

A Proposal will be an offer to the RMOW which the RMOW may accept within 60 days by sending a Notice of Award to the Proponent. Note that the RMOW will select the proposal that it deems, in its sole and absolute discretion, demonstrates the best combination of corporate qualifications, technical capability, project understanding, proposed approach to achieving the specified goals, and estimated total costs.

#### 4.7 Right to Reject

The RMOW is not bound to accept the lowest price proposal, nor is the RMOW in any way bound to award the project to any of the Proponent proposals. The RMOW reserves the right to reject any or all proposals for any reason whatsoever.

#### 4.8 Liability for Errors

The information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the RMOW, nor is it necessarily comprehensive.

#### 4.9 Responsibility

The Proponent shall not transfer responsibility to meet the obligations of this contract to a third party without the consent, in writing, of the RMOW project manager.

#### 4.10 No Collusion

Proponents shall not directly or indirectly communicate with any other Proponent regarding the preparation or presentation of their proposals, or in connection with the Proposal engage in any collusion, fraud or unfair competition.

#### 4.11 Conflict of Interest

A Proponent must disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the RMOW, its elected or appointed officials or employees. The RMOW may rely on such disclosure.

#### 4.12 Solicitation of Council Members and RMOW Staff

Proponents and their agents will not contact any member of the RMOW Council or RMOW staff with respect to this RFP, other than the contact person named in Section 5.3 at any time prior to the award of a contract or the cancellation of this RFP.

#### 4.13 Confidentiality

All Proposals become the property of the RMOW and will not be returned to the Proponent. All Proposals will be held in confidence by the RMOW unless otherwise required by law. Proponents shall be aware the RMOW is a "public body" defined by and subject to the Freedom of Information and Protection of Privacy Act of British Columbia.

#### 4.14 Proponents Expenses

Proponents are solely responsible for their own expenses in preparing and submitting Proposals, and for any meetings, negotiations or discussions with the RMOW or its representatives and consultants, relating

to or arising from the RFP. The RMOW will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a contract, or other activity related to or arising out of this RFP.

#### 4.15 Proponents Qualifications

By submitting a Proposal, a Proponent represents that it has the expertise, qualifications, resources, and relevant experience to supply the services requested.

#### 4.16 Contract Terms and Conditions

The successful Proponent, prior to Notice to Proceed, will sign the Terms and Conditions as outlined in the RMOW Professional Services agreement attached in Section 10.

#### 4.17 Insurance

At its' own expense and prior to the commencement of the term of the Contract, the Proponent shall obtain and maintain or cause to be obtained and maintained in force during the term of the Contract, insurance acceptable to the RMOW where the RMOW is named as additional insured with limits not less than those shown for each respective item as follows:

<b>Insurance</b>	<b>Consultant</b>
<i>Commercial General Liability (CGL)</i>	\$5 million per occurrence
<i>Automobile Liability</i>	\$5 million per occurrence
<i>Umbrella or Excess Liability</i>	To bring CGL or auto liability to \$5 million
<i>Professional Liability</i>	\$5 million per occurrence

#### 4.18 Subcontracting

Proposed subcontractors must be listed with attached resumes. A joint proposal submission must indicate which Proponent has overall responsibility of the project.

#### 4.19 Signature

The legal name of the person or firm submitting the Proposal shall be inserted in the Form of Proposal (Section 9). The Proposal shall be signed by a person authorized to sign on behalf of the Proponent and include the following:



- If the Proponent is a corporation then the full name of the corporation shall be included, together with the names of authorized signatories. The Proposal shall be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Proposal on behalf of the corporation is submitted;
- If the Proponent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venture shall be included, and each partner or joint venture shall sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture shall provide evidence to the satisfaction of the RMOW that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venture is a corporation then such corporation shall sign as indicated in subsection (a) above; or
- If the Proponent is an individual, including a sole proprietorship, the name of the individual shall be included.

## 5 GIS Data Submission Standards

The Resort Municipality employs Geographic Information Systems (GIS) to store and manage spatially related geographic data. To limit duplication of efforts and to expedite the integration of the spatial data with the RMOW's GIS, the following specifications and standards are required of every data submission.

### 5.1 Technical Specifications

Data submissions shall be made using geodatabase related file formatting. Shapefiles are not accepted unless a special exception has been requested and granted.

Any as-constructed drawings submitted as part of the project must as be geo-referenced. GIS data must accompany any geo-referenced drawings using the following specifications.

Software Compatibility	ArcGIS 10.7.1 ArcGIS Pro 2.5 or greater
File Format	Geodatabase
Projected Coordinate System	NAD_1983_UTM_Zone_10N
WKID	26910
Projection	Transverse Mercator

False Easting	500000.0
False Northing	0
Central Meridian	-123
Scale Factor	0.9996
Linear Unit	Meter (1.0)
Geographic Coordinate System	GCS_North_American_1983
Datum	D_North_American_1983
Vertical Coordinate System	CGVD 1928

## 5.2 Attribute Schema

If a pre-defined attribute schema is available for the project assets then the appropriate documentation will be provided. It is the consultants' responsibility to confirm the existence and comply with any existing GIS data structure.

Shall there be no pre-existing schema standard then the consultant is required to submit their GIS data attribute schema for approval.

## 5.3 Methodology

A methodology document outlining the process involved in creating the submitted data must all be included. The document must also contain details describing any subtype or domain values if present. Topology best-practice rules must also be adhered to when performing a Q/A of the data prior to submitting.

## 5.4 Templates, and Symbology

Any specialized or custom layer themes or map packages used the production of map products for the project are to be submitted along with the data and supplemental documents.

## 6 Capital Asset Log

### 6.1 Requirements

To fulfill our asset management program documentation it is required of the consultant to complete a capital asset worksheet, provided by the RMOW. The worksheet will need to be complete for all tangible assets, new and demolished. Each asset will be broken into the following group; buildings, drainage equipment, Improve land, sewer, transport, water electrical. The assets worksheet will include the information listed below.

#### Data required for the capital asset worksheet

- Name
- Project No.
- Completion date
- Cost
- Group/sub group
- Material
- Asset location (GIS coordinate, street etc.)
- Serial or ID (if applicable)
- Asset lifetime expectancy
- Metric (lineal assets) Length / width

*Note – If required, the capital asset worksheet will be provided to the proponent once the project has been awarded.*

## 7 Evaluation and Selection

### 7.1 Evaluation Team

The evaluation of Proposals will be undertaken by the Evaluation Team on behalf of the RMOW. The Evaluation Team may consist of one or more persons at the Evaluation Team's discretion. The Evaluation Team may consult with other RMOW staff, or third party individuals at their discretion.

### 7.2 Mandatory Criteria

Any Proposal that does not satisfy all mandatory criteria will be rejected.

Required (Mandatory) Criteria	Check -ü
1. The proposal must be received by the specified closing date and time.	
2. One (1) electronic copy of the proposal must be submitted in PDF format.	

Required (Mandatory) Criteria	Check -ü
3. An unaltered, completed and signed RFP Form of Proposal must be submitted with the proposal.	
4. Proposals must be in English.	

### 7.3 Weighted Criteria Benchmarks

#### Evaluation Matrix

The Evaluation Team intends to evaluate all proposals according to the evaluation matrix criteria categories outlined below. If minimum required points are not met in one or more of the evaluation criteria, the Proposal will not be considered for award.

Criteria	Available Points	Minimum Required Points
Project Understanding	15	7.5
Technical Capabilities	30	15
Qualifications and Experience	20	10
Timeline	10	5
Cost	25	No Minimum Required
TOTAL	100	50

#### Scoring Table

The Evaluation Team intends to use the scoring table below as a guideline for determining criterion score. Prompts are provided to give the Proponents an idea as to how each criterion will be examined and scored. The weighting of the prompts in determining the criterion score is up to the discretion of the Evaluation Team unless otherwise stated.

Scoring Table
---------------

Points Awarded (% of available)	Quality	Criteria
100%	Exceptional	Exceptional; far exceeds requirements with no added risk.
80%	Very Good	Exceeds expectations; risk deemed acceptable or no added risk.
60%	Acceptable	Meets expectations and all minimum requirements.
40%	Below	Does not meet expectations or minimum requirements.
20%	Well Below Requirements	Fails to meet minimum requirements; proposes a solution or provides explanations that is not acceptable or relevant.
0%	Unacceptable	Proposed solution deemed unacceptable in every aspect.

### 7.3.1 Project Understanding

The Proponents will be scored on their understanding of the Proposal as described in the Specific Project Requirements (SPR). As a part of the Executive Summary, include a narrative that illustrates an understanding of the Request for Proposal requirements, the needs of the RMOW and any proposed augmentations to the Request for Proposal to ensure that the objective of the project will be fully met. The Evaluation Team will take the entire Proposal submission into consideration when evaluating the Project Understanding section.

#### Scoring

The following prompts will be used to determine the criterion score:

Prompts
Is the overall approach tailored to the needs of the RMOW as described in the RFP?
Is the Proposal easy to read and concise?
Does the submitted Proposal acknowledge all criteria in the SPR accurately?

Do any proposed augmentations conflict with the needs of the RMOW?

### 7.3.2 Technical

The Proponent will be scored on their work plan to perform the project, and shall express high level solution to the tasks in the SPR. The Evaluation Team will take the entire Proposal submission into consideration when evaluating the Technical section.

#### Scoring

The following prompts will be used to determine the criterion score:

Prompts
Is the WBS/work plan plausible and tailored to the needs of the RMOW?
Is the reasoning behind the methodology sound and well explained?
Have the methods described in the work plan previously been used in past projects and were they successful? Is there evidence that this is the optimal solution for this scope of work?

### 7.3.3 Qualifications and Experience

Qualifications of the Proponent and Proponents team are to be submitted according to section 3.6 and 3.7. Only qualifications that are relevant to the SPR will be considered when evaluating this section. References may or may not be contacted.

#### Scoring

The following prompts will be used to determine the criterion score:

Prompts
Qualifications of the personnel and how they relate to the tasks they are responsible for as described in the Proponents Proposal.
Proponent's team's experience with similar projects within the last ten (10) years. Submitted experience beyond the previous ten (10) years will not have weight on the scoring.

Technical and management capability, capacity, skills and qualifications of the Proponent and any proposed subcontractor(s).

Work performed for submitted references is by the proposed team members and is within the last ten (10) years and is relevant to the SOW of the project.

#### 7.3.4 Timeline

Timelines that do not match with the milestone dates described in section 2.4 may be scored lower. Alternative timelines to section 2.4 accompanied with explanations that the Evaluation Team deems to not interrupt or inconvenience the RMOW will not be penalized. Timelines that are ahead of the milestone dates may or may not receive more marks than timelines that meet the milestone dates and is up to the discretion of the evaluation team.

#### Scoring

The following prompts will be used to determine the criterion score:

Prompts
Tasks are based on the work plan with start and end dates for each task.
Includes milestone dates and deliverables.
Timeline items are adequately broken down and easy to follow.
Start and end dates for each tasks are realistic with reasonable lead times.

#### 7.3.5 Cost

Cost evaluation is broken into two parts. The total cost and the fee schedule cost breakdown. The total cost is worth 80% of the points available and the fee schedule is worth 20% of the points available.

#### Scoring

Prompts	Weighting
<p>The total cost will be evaluated using the following equation</p> $\frac{\text{Lowest Priced Acceptable Proposal}}{\text{This Proposal's Price}} \times \text{Points Available} \times 80\%$	80%

The fee schedule is adequately broken down and easy to follow.	20%
--	-----

#### 7.4 Interviews

If final tabulated scores are within 5 points, the Evaluation Team may, at its discretion, invite some or all of the Proponents to appear before the Evaluation Team to provide either clarifications of their Proposals or a request to present on specified criteria and scoring. In such event, the Evaluation Team will be entitled to consider the answers received in evaluating Proposals. Interview questions and scoring may or may not be provided to the Proponent before the interview.

#### 7.5 Litigation

In addition to any other provision of this RFP, the RMOW may, in its absolute discretion, reject a Proposal if the Proponent, or any officer or director of the Proponent submitting the Proposal, is or has been engaged directly or indirectly in a legal action against the RMOW, its elected or appointed officers, representatives or employees in relation to any matter.

In determining whether or not to reject a Proposal under this section, the RMOW will consider whether the litigation is likely to affect the Proponent's ability to work with the RMOW, its Consultants and representatives, and whether the RMOW's experience with the Proponent indicates that there is a risk the RMOW will incur increased staff or legal costs in the administration of the Contract if it is awarded to the Proponent.

#### 7.6 Consideration of Relevant Factors

The RMOW reserves the right to decline to select any Proponent which the RMOW, acting reasonably and fairly, determines would, if selected, result in greater overall cost or material risk to RMOW as compared to another Proponent, considering any relevant factors, including a Proponent's financial resources, safety record, claims and litigation history, work history and environmental record.

#### 7.7 Additional Information

The RMOW reserves the right to select the Proponent best suited for the project and intends to evaluate the proposal(s) as fairly.

The RMOW has disclaimed any intention to assume contractual or other obligations to Proponents during the RFP process partly to ensure that it retains maximum flexibility in regard to whether it proceeds with one of the Proponents, or how it will evaluate proposals.

If a proposal is determined to be unclear or deficient in some aspects, but these deficiencies are capable of being clarified or rectified, the RMOW may prepare a list of questions for the Proponent, to clarify or remedy the deficiencies. If, in the opinion of the RMOW, these clarifications and rectifications do not



overcome the deficiencies, the RMOW, at its sole and absolute discretion, may decide to reject the proposal. The RMOW may contact any or all of the Proponents to seek further clarification and information before awarding the contract.

## 8 Form of Proposal

RFP Project Title: Sanitary Sewer Force Main Repairs

RFP Reference No: 5330-03-1017

Legal Name of Proponent:

Contact Person and Title:

Business Address:

Telephone:

E-Mail Address:

Dear Sir/Madam:

I/We, the undersigned duly authorized representative of the contractor, having received and carefully reviewed all of the Proposal documents, including the RFP and the following addenda:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*(addenda, if any)*

and having full knowledge of the Site(s), and having fully informed ourselves as to the intent, difficulties, facilities and local conditions attendant to performing the Services, submit this Proposal in response to the RFP.

I/We confirm that this proposal is accurate and true to best of my/our knowledge.

I/We confirm that, if I/we am/are awarded the Agreement, I/we will at all times be the “prime consultant” as provided by the Worker's Compensation Act (British Columbia) with respect to the Services. I/we further confirm that if I/we become aware that another consultant at the place(s) of the Services has been designated as the “prime consultant”, I/we will notify the RMOW immediately, and I/we will indemnify and hold the RMOW harmless against any claims, demands, losses, damages, costs, liabilities or expenses suffered by the RMOW in connection with any failure to so notify the RMOW.

This Proposal is submitted this \_\_\_\_\_ day of \_\_\_\_\_, 2019

I/We have the authority to bind the Proponent.

\_\_\_\_\_  
(Name of Proponent)

\_\_\_\_\_  
(Name of Proponent)

\_\_\_\_\_  
(Signature of Authorized Signatory)

\_\_\_\_\_  
(Signature of Authorized Signatory)

\_\_\_\_\_  
(Print Name and Position of Authorized Signatory)

\_\_\_\_\_  
(Print Name and Position of Authorized Signatory)

## 9 RMOW Consulting Services Agreement Contract Terms and Conditions Template

CONTRACT FOR CONSULTING SERVICES

MASTER SERVICES AGREEMENT –

THIS AGREEMENT is effective as of the XX<sup>th</sup> day of XXXXXXXX, 20XX.

BETWEEN:

The Resort Municipality of Whistler, having an address at

4325 Blackcomb Way,

Whistler, B.C.

V8E 0X5

(the “RMOW”)

AND:

[Consultant Firm Name] having an address at [Consultant’s full address]

(the “Consultant”)

WHEREAS:

The RMOW commenced a procurement process for the purposes of soliciting responses from suitably qualified consultants to provide “Services” outlined in Schedule A as per each individual project agreement and/or accepted individual proposal (“namely the Project”) and the Consultant submitted a response thereto (the “Submission”) which was accepted by RMOW;

The Consultant is in the business of providing the services contemplated by this Contract;

RMOW wishes to engage the Consultant to provide the Services on the terms and conditions herein set forth;

NOW THEREFORE THIS AGREEMENT WITNESSES for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties, intending to be legally bound, agree as follows:

INTERPRETATION

Definitions

In this Contract unless something in the subject matter or context is inconsistent therewith, the capitalized terms herein will have the meanings set out below:

“Business Day” has the meaning given in Section 16.1 of this Contract;

“Change Order” means a change within the general scope of Services which may alter the Services, Contract Price or Contract Time.

“Confidential Information” means:

any information, in whatever form (including written, oral or stored in any computer or other electronic, magnetic or optical storage system), which is non-public, confidential or proprietary in nature, whether marked as such or not, obtained directly or indirectly from RMOW and whether obtained by the Consultant before or after the date of this Contract, including without limitation, corporate records and employee records;

any information, in whatever form, designated by the RMOW in writing as confidential or proprietary or marked with words of like import when provided to the Consultant or any other Person;

information orally conveyed to any director, officer, employee or other representative of the Consultant, if RMOW states at the time of the oral conveyance or promptly thereafter that such information is confidential, and provides specific written confirmation thereof to the Consultant within ten (10) days of the oral conveyance; and

all Work Product as defined in this Contract, except as may be agreed in writing by the parties as falling outside the definition of Confidential Information;

“Confidential Information” does not mean:

which was in the possession of the Consultant prior to disclosure by the RMOW;

which is already in the public domain or which subsequently becomes part of the public domain other than through disclosure by the Consultant;

which is independently developed or learned by the Consultant without use of any Confidential Information; and

which the Consultant receives from a third Person who was free to make such disclosure without breach of any legal obligation,

provided that the Consultant can demonstrate to the satisfaction of RMOW that such information falls within the scope of the exclusions set forth above.

“Consultant’s Representative” has the meaning given in Section 18.1 of this Contract;

“Contract” means this agreement including the Schedules to this agreement as amended from time to time with the written approval of the parties;

“Contract Price” has the meaning given in Schedule B of this Contract;

"Dispute" means any difference between the RMOW and the Consultant, of any claim, or any dispute, relating to or arising out of the Services or the interpretation of the Contract, or any failure by the RMOW and the Consultant to agree where the Contract call for agreement;

“Person” means any individual, corporation, limited-liability company, partnership, firm, joint venture, association, trust, or other entity or organization, including a government or an agency or instrumentality thereof;

"Procurement Documents" means the procurement documents attached hereto as Schedule F (if any);

"Records" has the meaning set out in Section 5.1 of this Contract;

“RMOW Representative” has the meaning given in Section 18.1 of this Contract;

“Services” has the meaning given in Schedule A to this Contract;

“Work Product” means all that which is prepared, produced or developed by the Consultant as a result of this Contract, whether in written or electronic form and all copies of same. Work Product includes but is not limited to reports, data (including recorded “personal information” about an identifiable individual), information, calculations, logs, working papers or finished copy documents or information of any kind prepared or acquired by the Consultant in connection with this Contract.

“Term” has the meaning given in Section 2.1 of this Contract

#### Headings

The division of this Contract into articles and sections and the insertion of the recitals and headings are for convenience of reference only and shall not affect the construction or interpretation of the Contract.

#### Use of the Word “Including”

The word “including” when following any general term or statement will not be construed as limiting the general term or statement to the specific matter immediately following the word “including” or to similar matters, and the general term or statement will be construed as referring to all matters that reasonably could fall within the broadest possible scope of the general term or statement.

#### Currency

All transactions referred to in this Contract will be made in lawful currency of Canada.

#### Singular, Plural, Gender and Person

Wherever in this Contract the context so requires the singular number shall include the plural number and vice versa and any gender used shall be deemed to include the feminine, masculine or neuter gender.

#### Statutes

Each reference to a statute is deemed to be reference to that statute and to the regulations made under that statute as amended or re-enacted from time to time.

#### Schedules

The following attached schedules (the “Schedules”) are incorporated in this Contract and are deemed to be part of this Contract:

- Schedule A - Services to be Provided
- Schedule B - Payment and Fees Schedule
- Schedule C - Insurance
- Schedule D - Approved Subcontractors
- Schedule E - Consultant’s Submission
- Schedule F - RMOW Procurement Documents
- Schedule G - Privacy Protection Schedule



#### Order of Priority

If there is a conflict between a provision in a Schedule to this Contract and any other provision of this Contract, the other provision of this Contract will prevail unless the provision in a Schedule expressly states that it will prevail over a conflicting provision of the Contract. If this Contract is a result of a competitive procurement process, the order of priority of documents from highest to lowest will be:

this Contract;

Schedules A, B, C, D, E, F and G;

the RMOW's purchase order for the Services (if any);

extracts from the Consultant's Submission respecting the Services, that are attached as a Schedule (if any); and

extracts from RMOW's Procurement Documents respecting the Services, that are attached as a Schedule (if any).

#### TERM OF CONTRACT

##### Term

The term of this Contract (the "Term") will commence on **Month... Day 20XX (year) and continue until December 31, 20XX (year)**, subject to the following:

earlier termination in accordance with the terms of this Contract; and

renewal or extension of the Term on such terms as the parties agree to in writing. If the parties agree to an extension of the Term, then the following will apply:

the parties will mutually agree on a new Schedule B – Payment and Fees Schedule;

all other terms and conditions of this Contract not mutually amended will remain the same; and

the Term will be extended for the period(s) agreed to by the parties.

#### SERVICES PROVIDED

##### Services

The Consultant shall provide the Services described in Schedule A in accordance with this Contract.

##### Approvals

The Consultant shall procure and pay for all approvals necessary or advisable to perform its obligations under this Contract.

#### Service Standards

The Consultant will at all times during the Term of this Contract perform the Services using standards, practices, methods and procedures to a good commercial standard, in accordance with and conforming to all applicable law and exercising that degree of care, skill and diligence which would reasonably and ordinarily be expected from a qualified, skilled and experienced person in British Columbia providing Services similar in scope, nature and complexity to the Services.

#### Supervision

The Consultant shall ensure all persons employed or retained by the Consultant to provide the Services are competent to perform them, meet all professional qualifications, and are properly trained, instructed and supervised.

#### RMOW Instructions

RMOW may from time to time give the Consultant reasonable instructions (in writing or otherwise) as to the Services required to be provided. The Consultant shall comply with those instructions; however, the Consultant shall determine the manner in which the instructions are carried out.

#### RMOW Facilities

The RMOW may, but is not required, to provide any facilities (including but not limited to work space, office equipment, computer equipment, telephone or other communication devices, or secretarial support) or other technical, accounting, transportation or other support services to the Consultant. Any instruments or tools necessary to provide the Services are the responsibility of the Consultant and are provided at the sole risk and expense of the Consultant. For certainty, the RMOW's provision of any facilities shall be for the convenience of the parties only and shall not create or be deemed to create an employment, partnership, joint venture or agency relationship between the parties.

#### Security Requirements

Only the employees of the Consultant specifically assigned to provide the Services and will be allowed on site at any of RMOW's facilities. The Consultant will inform RMOW in advance of the names of the employees that will attend RMOW's facilities in order to provide the Services. RMOW will inform the Consultant of all applicable procedures related to security. The Consultant will comply with all applicable RMOW procedures relating to security that the Consultant has been thereby informed of.

#### RMOW Procedures and Policies

The Consultant and any of its employees providing the Services will comply with all RMOW policies or procedures, including with regard to security, fire and safety, conflict of interest, standards of business conduct, human rights, harassment, workplace conduct and other policies or procedures of a like nature, that it has been provided copies of or otherwise been made reasonably aware of.

#### Representations and Warranties

The Consultant covenants, represents and warrants to the RMOW that:

the Consultant is legally entitled to carry on its business in British Columbia and is in good standing with respect to filings of annual reports according to the records of the Registrar of Companies of British Columbia;

the Consultant has the power and capacity to enter into this Contract and to comply with every term and condition of this Contract;

all necessary proceedings have been taken to authorize the Consultant to enter into this Contract and to execute and deliver this Contract;

this Contract has been properly executed by the Consultant and is enforceable against the Consultant in accordance with its terms;

any statement, representation or information, whether oral or written, made, furnished or given by the Consultant, its principals, partners, directors, officers or anyone acting on behalf of the Consultant, to the RMOW in connection with this Contract is materially correct and accurate;

the Consultant has no knowledge of any fact that materially adversely affects or, so far as can be foreseen, might materially adversely affect either its financial condition or its ability to fulfill its obligations under this Contract;

the Consultant has no knowledge of any claims against it that in either case would materially adversely affect either its financial condition or its ability to fulfill its obligations under this Contract;

the Consultant is in compliance with all tax, Workers' Compensation and other legislation, regulations and laws to which it is subject, and holds all permits, licences, consents and authorities required by law to conduct its business;

the Consultant's employees specifically assigned to provide the Services are suitably qualified to enable full and proper provision of the Services and ;

the Consultant accepts all risks within this Contract identified as being borne by the Consultant;

the Consultant will comply with all the requirements of this Contract and will perform all its obligations hereunder;

no partnership, joint venture or agency involving the RMOW is created by this Contract; and

all personnel hired, retained or engaged by the Consultant to provide the Services and are not the employees of the RMOW. The Consultant is solely responsible for arranging all matters arising out of the relationship of employer and employee between the Consultant and its employees specifically assigned to provide the Services and .

## TERMS OF PAYMENT

### Payment

RMOW will pay the Consultant, in full payment and reimbursement for providing the Services, the Contract Price and expenses set out in Schedule B and the Consultant hereby accepts the same as payment in full for all Services provided by the Consultant, including all profit and all costs of supervisions, labour, overhead, financing incurred in providing the Services. The Consultant will be responsible for determining whether the Services provided are subject to any applicable taxes.

### Invoices

Payments will be made on receipt of the Consultant's monthly itemized account or for such other periods as may be mutually agreed subject to verification by the RMOW that the Services have been satisfactorily performed. The Consultant's itemized account shall show the period the billing pertains to, specific time worked in the billing period, and work completed, and shall itemize all taxes as separate line items. Where required by the RMOW, the Consultant will deliver to the RMOW a written statement of any goods and services taxation and or business identification numbers in addition to any other billing information reasonably required by the RMOW.

### Disbursements

RMOW is not obliged to pay the Consultant any monies other than the Contract Price described in Schedule B. The Consultant is not entitled to reimbursement for any other expenses or disbursements of any kind except those that are necessarily and reasonably incurred due to a change in scope and have been approved in advance in writing by the RMOW or such other expenses or disbursements that have been approved in advance by the RMOW. Reimbursement is subject to submission of evidence of actual expenditures satisfactory to the RMOW and to applicable expenditure policies and procedures.

### Non Resident of Canada

If the Consultant is not a resident of Canada, RMOW may be required by law to withhold income tax from the fees described in Schedule B and then to remit that tax to the Receiver General of Canada on the Consultant's behalf.

#### Services Provided after Expiry of the Term

No payment will be made for Services provided after the Term of this Contract unless the Term has been renewed or extended in accordance with this Contract.

#### Withholding of Payments

In the event that the Consultant fails to perform its obligations pursuant to the Contract on a timely basis the RMOW may at its discretion withhold any payments otherwise owed to the Consultant, pending performance of such obligations. No interest will be paid to the Consultant as a result of any such withholding. Any withholding of payments are in addition to and will not prejudice RMOW's other rights and remedies under this Contract.

#### Payment Due Date and Method of Payment

Payment by the RMOW shall be net thirty (30) days from the receipt of invoices provided by the Consultant in accordance with the terms of the Contract. Payment by the RMOW will be made by direct deposit, Consultant to fill out and submit RMOW Direct Deposit Form.

#### RECORDS

##### Records

The Consultant will keep complete books and records (the "Records") relating to the provision of the Services including all performance and other reports, time records and books of account, invoices, receipts, vouchers of all expenses incurred in the form and content satisfactory to the RMOW acting reasonably and shall retain all such Records for two years following termination of the Contract, or for any longer period required by law.

##### Inform RMOW

Upon the RMOW's request, the Consultant shall fully inform the RMOW of all work done by the Consultant or an approved subcontractor in connection with providing the Services under this Contract.

##### Inspection

The Consultant shall permit the RMOW at all reasonable times during the Term of this Agreement and, as applicable, for a period of two (2) years thereafter (the "Access Period"), to inspect, review and copy all Work Product and other material that has been produced or received by the Consultant and any approved subcontractor as a result of this Agreement including without limitation accounting records, findings, software, data, specifications, drawings, reports and documents whether complete or not.

##### Audit

The RMOW shall have the right to audit the work performed by the Consultant during the Term of this Contract and for two (2) years following expiry of the Term or any extension thereof.

#### INDEPENDENT CONSULTANT

##### Independent Consultant

The Consultant is at all times an independent Consultant with control over the manner and means of the Consultant's performance. The Consultant is not an employee, servant or agent of RMOW and nothing herein shall create or be deemed to create a partnership, joint venture or agency relationship between the parties. The Consultant is primarily responsible for provision of the Services and may not delegate or assign any services or work to any other person without the prior written consent of RMOW. The Consultant will be solely liable for the wages, fringe benefits, work schedules and work conditions of any directors, officers, servants, agents and employees.

##### No Entitlement to Benefits

As an independent Consultant, the Consultant is not entitled to any benefits or payments whatsoever over and above those specifically provided for in this Contract. Specifically the Consultant will not be entitled to any rights or privileges as are available from time to time to employees of RMOW including without limitation insurance benefits, health benefits, holidays and paid vacation.

##### Control and Direction of Employees

The Consultant acknowledges that the Consultant is responsible for the control and direction of the Services and the control and direction of the Consultant's employees.

##### Statutory and Other Payments

The Consultant shall be liable and responsible for payment to the proper authorities of all income tax payments, employment insurance premiums, Canada Pension Plan contributions and assessments, and all other employment expenses, statutory or otherwise in relation to the Services provided under this Contract.

##### Workers Compensation

The Consultant will, at its own expense, procure and carry full Workers' Compensation Board coverage for the Consultant and employees of the Consultant engaged in the Services;

The Consultant shall comply with and ensure that any Subcontractors comply with and conform to all health and safety laws, by-laws or regulations of the Province of British Columbia, including without limitation the *Workers' Compensation Act* and Regulations pursuant thereto. The Consultant agrees that it is the "Prime Contractor" for the Services and pursuant to Section 118 of the *Workers' Compensation Act*.

The RMOW may, on twenty-four (24) hours written notice to the Consultant, but without notice in the event of an emergency, install devices or rectify any conditions creating an immediate hazard existing that would be likely to result in injury to any person. However, in no case will the RMOW be responsible for ascertaining or discovering, through inspections or review of the operations of the Consultant or otherwise, any deficiency or immediate hazard.

#### Termination

If at any time Canada Revenue Agency or any other competent authority determines that the Consultant is an employee of RMOW then this Contract shall automatically terminate as of the date of such determination.

#### Consultant's Costs of Tax Compliance

It is clearly understood and agreed that the costs to the Consultant in complying with the preceding provisions are not subject to additional reimbursement over and above the amount provided for under the terms of this Contract.

#### Risk of Liability

The Consultant assumes all risk and liability for personal injury or damage to personal property caused by the Consultant's mishap, negligence or willful misconduct in carrying out the terms of this Contract and for which adequate levels of insurance coverage shall be obtained by the Consultant.

#### No Agency

The Consultant will not commit or purport to commit the RMOW to pay any money unless specifically authorized by this Contract.

#### BUSINESS PREMISES/LICENCE

##### Place of business

Unless the RMOW will be providing facilities under Section 3.6 of this Contract, the Consultant, at its own expense, will establish and maintain during the Term, a proper place of business at a lawful place that allows for reasonable commute or accessibility to the Project site from which the business and supervision of this Contract will be carried out.

##### Business Licence

If the Consultant maintains a place of business within the municipal boundaries of the RMOW, or generates revenue from business activity within the municipal boundaries of the RMOW, the Consultant

will at all times during the Term be in possession of a valid and subsisting business licence issued to it by the RMOW and authorizing it to carry out and perform the Services required to be performed under this Contract.

## OWNERSHIP

### Work Product

The Work Product, any Confidential RMOW Information and any property provided by the RMOW to the Consultant is RMOW's exclusive property. The copyright in the Work Product belongs exclusively to the RMOW and the Consultant hereby waives any moral rights in such Work Product and confirms the vesting of copyright in such Work Product in RMOW.

### Assignment of Rights in Work Product

The Consultant hereby irrevocably assigns to the RMOW all right, title and interest worldwide in and to all Work Product. In the event the Consultant has any rights in the Work Product which cannot be assigned, the Consultant agrees to waive enforcement worldwide of such rights against RMOW and, at the request of RMOW, to grant RMOW an exclusive perpetual, fully paid up license without royalty in and to such Work Product worldwide with the right to sublicense. The Consultant shall take all actions and execute all documents as may be requested by the RMOW from time to time to fully vest in RMOW all right, title and interest worldwide in and to such Work Product. RMOW agrees, to the fullest extent permitted by law, to indemnify and hold the Consultant harmless from any claim, liability or cost directly attributable to the negligent misuse or incorrect use of the Work Product by the RMOW.

### Copyright Infringement

The Consultant agrees that it will not infringe any third party's intellectual property rights in creating Work Product pursuant to this Contract. The Consultant agrees to indemnify RMOW from and against any loss, damage or liability for the infringement of any patent, trade mark, trade secret or copyright by RMOW arising from or in connection with RMOW's usage of the Work Product. The Consultant agrees it shall defend, settle or compromise at its own expense any action for patent, trade mark, trade secret or copyright infringement brought against RMOW or the Consultant. The Consultant warrants and represents that all Work Product provided to RMOW pursuant to this Contract do not infringe any existing patent, trade mark, trade secret or copyright registered or recognized in Canada or elsewhere.

### Surrender of Documents and Materials

The Consultant shall not at any time or in any manner unless otherwise agreed to in writing by the RMOW, make or cause to be made copies, pictures, duplicates, facsimiles or other reproductions or recordings of any type, or any abstracts or summaries of any Work Product, reports, studies, memoranda,



correspondence, manuals, records, plans or other written, printed or otherwise recorded documents, papers or materials of RMOW, or which relate in any manner to the present or prospective operations of RMOW, except as may be necessary in the provision of the Services under this Contract. The Consultant shall have no interest in any of these materials and agrees, subject to its professional obligations, to surrender any of these materials which may be in the Consultant's possession to the RMOW immediately upon termination of this Contract at the request of RMOW or at any time prior to termination at the request of RMOW.

## CONFIDENTIALITY

### Confidentiality

The Consultant will at all times during the Term and thereafter treat as confidential all Confidential Information and other reports, studies, memoranda, correspondence, manuals, records, plans or other written, printed or otherwise recorded documents, papers, materials and documents supplied to or obtained by the Consultant as a result of this Contract. The Consultant shall not at any time during the Term or thereafter permit the publication, release or disclosure of the same without the prior written consent of RMOW except as required by applicable law.

The RMOW will at times during the Term and thereafter treat as confidential and maintain the confidentiality on all information, reports, studies, memoranda, correspondence, manuals, records, plans or other written, printed or otherwise recorded documents, papers, materials and documents provided by the Consultant, orally or in writing as confidential in nature. Except as required by law, including under the *Freedom of Information and Protection of Privacy Act*, as amended, or unless the Consultant provides its written consent, the RMOW shall not at any time during the Term or thereafter permit the publication, release or disclosure of such confidential information to any third parties.

### Non-Disclosure

The Consultant will not, at any time either during the Term or thereafter, disclose to or discuss with anyone other than an authorized RMOW employee or representative, any Confidential Information of RMOW or its elected officials, officers or employees. The Consultant will use such Confidential Information and knowledge only for RMOW purposes unless the Consultant has obtained RMOW's prior express written authorization to do otherwise.

### No Use of Information

The Consultant shall not use Confidential Information or any other information relating to the affairs of RMOW for the Consultant's own benefit or purposes or for the benefit or purpose of any other Person whether before or during the Term or after the expiry of the Term.

#### Survival

The provisions of this confidentiality clause shall survive termination of the Contract.

#### CONFLICT OF INTEREST

##### No Conflict of Interest

The Consultant represents and warrants to the RMOW that the Consultant does not have an interest, directly or indirectly either individually or in conjunction with another entity in any firm, association, syndicate, company, corporation or other business enterprise which could benefit or otherwise be affected by any decision likely to be made by the RMOW in reliance on or as a result of the Services provided by the Consultant under this Contract. RMOW shall provide to the Consultant its conflict of interest and standards of business conduct procedures. The Consultant shall comply with RMOW's conflict of interest and standards of business conduct procedures as provided notwithstanding the Consultant is an independent Consultant and not an employee of RMOW.

##### No Conflict with Other Relationships

The Consultant will not, during the Term, perform a service for or provide advice to any person, firm or corporation if in the reasonable opinion of RMOW, such performance will give rise to a conflict of interest between the Consultant and RMOW, and the Consultant shall take all steps to ensure the avoidance of all direct or indirect conflicts of interest (either actual or potential) between the interests of the Consultant and its directors, officers, servants, agents and employees, and those of RMOW.

##### Disclosure of Conflict of Interest

The Consultant will immediately disclose all conflicts of interest and potential conflicts of interest to the RMOW as soon as any real or perceived conflict of interest arises.

##### Good Faith

The Consultant will discharge the Consultant's obligations to the RMOW in all dealings and transactions relating to the Services in the utmost good faith.

#### INDEMNIFICATION

##### General Indemnity

The Consultant shall indemnify and save harmless the RMOW, its elected officials, officers, employees, servants and agents from and against any and all losses, claims, demands, damages, actions, causes of action, fines, penalties, liens, costs and expenses the RMOW may sustain or incur at any time, either

before or after the expiration or termination of this Contract, arising directly or indirectly by reason of negligent acts, errors, or omissions or wilful misconduct of the Consultant or any agent, employee, director or officer of the Consultant in connection with this Contract including any injury to or death of any person or any damage to any and all persons or property, whether deliberate, accidental or through negligence except to the extent that any such claim arises solely from the negligence of RMOW, its other Contractor(s), assigns(s) or authorized representatives.

RMOW shall indemnify and save harmless the Consultant, its elected officials, officers, employees, servants and agents from and against any and all losses, claims, demands, damages, actions, causes of action, fines, penalties, liens, costs and expenses the Consultant may sustain or incur at any time, either before or after the expiration or termination of this Contract, arising directly or indirectly by reason of the negligent acts or omissions or wilful misconduct of the RMOW or any agent, employee, director or officer of the RMOW in connection with this Contract including any injury to or death of any person or any damage to any and all persons or property, except to the extent that any such claim arises solely from the negligence of the Consultant, its sub-Contractor(s), assign(s) or authorized representatives.

Neither party shall be liable to the other in connection with any claim for any special, incidental, indirect or consequential loss or damages excepting always that this indemnity does not apply to the extent, if any, to which the claims are caused by errors, omissions or the negligent acts of the party seeking indemnification, its other contractors(s), assign(s) and authorized representatives.

The maximum aggregate liability of the Consultant for any loss or damage sustained by the RMOW in connection with this Contract (whether as a result of negligence or otherwise) shall not exceed \$2,000,000.00.

#### Survival

The provisions of this indemnity clause will survive termination of the Contract.

#### TERMINATION

##### Default of Consultant

Notwithstanding any other provision of this Contract, if the Consultant is not performing the Services to the satisfaction of the RMOW or fails to perform the Services as and when reasonably requested by RMOW, or is in breach of any provision of this Contract, the RMOW may, at its option, either:

Issue written notice to the Consultant requiring that such default be corrected. If within 5 Business Days after receipt of such notice such default shall not have been corrected or reasonable steps taken to correct such default, then at the sole discretion of the RMOW, the RMOW may give a further written notice to the Consultant immediately terminating this Contract, or:

Terminate this Contract giving 5 Business Days' notice of termination to the Consultant.

In the event the RMOW exercises its option to terminate, the RMOW may withhold payment of any amount owing to the Consultant under this Contract for the provision of the Services, set-off any damages suffered by the RMOW against any amounts owing to the Consultant under this Contract for provision of the Services and pursue other remedies to recover damages from the Consultant for any losses caused to the RMOW as a result of the Consultant's performance under this Contract.

A material breach of the privacy obligations of this Contract would be grounds to terminate the contract.

#### Termination Without Cause

Notwithstanding any other provision of this Contract, the RMOW or the Consultant may terminate this Contract for any reason upon giving not less than ten (10) days written notice of termination to the other party. The Contract may also be terminated in a shorter period of time as may be mutually agreed upon in writing by the parties. In the event that notice of termination is given pursuant to this section, the RMOW will pay the Consultant that portion of the fees and expenses described in this Contract which equals the portion of the Service that was completed to the RMOW's satisfaction before termination. Such payment will discharge the RMOW from all further liability under this Contract. Concurrently with termination by the RMOW pursuant to this Section, all obligations of the Consultant to perform the Services will terminate, excepting those performance obligations set out at Section 12.5 herein.

#### Default of RMOW

If the RMOW fails to make payment to the Consultant in accordance with this Contract, then the Consultant may, by written notice to the RMOW, require that such default be corrected. If within 5 Business Days after receipt of such notice such default shall not have been corrected, or reasonable steps taken to correct such default, the Consultant may, without limiting any other right or remedy it may have, give a further written notice to the RMOW to immediately terminate this Contract. **In such event, in addition to any other rights or remedies the Consultant may have, the Consultant shall be paid by the RMOW for all Services performed pursuant to this Contract and remaining unpaid as of the effective date of such termination.**

#### Limitation of Liability

The Consultant agrees that notwithstanding anything herein or any duty, principle, term or rule of law to the contrary, whether express or implied, RMOW shall not be liable to the Consultant for any loss or damage of any nature whatsoever flowing from early termination of this Contract, including without limitation any special, incidental, direct, indirect or consequential damages arising out of such early termination nor shall RMOW be under any obligation to the Consultant save and except for the payment

for such Services as may have been performed in accordance with the terms of this Contract up to the date of termination.

Warranties to continue

If for any reason the whole or any part of this Contract is terminated, the Consultant's obligations in this Contract as to quality, correction and warranty will continue in force after such termination with respect to the Services performed by the Consultant up to the time of termination.

## CHANGES

Right to Make Changes

The RMOW reserves the right to request changes at any time as a result of requirements, site conditions, emergencies, government regulations or any other reasonable cause and:

The RMOW will notify the Consultant in writing as soon as reasonably possible when a change in the Services is proposed or required.

Where a proposed change in Services requires an adjustment to the Contract Price and or Contract Time, agreement to the adjustment between both parties must be recorded in a Change Order.

The RMOW shall make payment of a Change Order within 30 days of execution of the Change Order by the RMOW and completion of the change in services.

The Consultant shall not perform any changes without written authorization from the RMOW.

The RMOW will not make any payment for changes not agreed to in an executed Change Order.

## INSURANCE

Maintain Insurance

The Consultant agrees that they shall maintain and pay for insurance on the terms, including coverage, amounts and deductibles outlined in Schedule C.

The Consultant acknowledges that any requirements of the RMOW as to the amount of coverage under any policy of insurance will not constitute a representation by the RMOW that the amount required is adequate and the Consultant acknowledges and agrees that the Consultant is solely responsible for obtaining and maintaining policies of insurance in adequate amounts. The insurance policy coverage limits will not be construed as relieving the Consultant from responsibility for any amounts for which the Consultant may be legally liable which may exceed these limits.

Evidence of Insurance

Upon the request of RMOW, the Consultant shall provide the RMOW with evidence of insurance in a form satisfactory to the RMOW.

#### Waiver of subrogation

The Consultant hereby waives all rights of recourse against the RMOW for loss or damage to the Consultant's property.

#### Notice of Claims

If at any time during the provision of the Services or the Consultant becomes aware of a claim or potential claim against any insurance policy that the Consultant has, pursuant to this Contract, indicated to the RMOW may apply to the Services then the Consultant will immediately advise the RMOW in writing of such claim, including particulars.

#### ASSIGNMENT AND SUBCONTRACTING

##### Consent Required

The Consultant will not assign this Contract or any part thereof without the prior written consent of the RMOW. The Consultant will not subcontract any of the Consultant's obligations under this Contract to any Person other than the Persons listed in Schedule D (if any) without the prior written consent of the RMOW. No assignment or subcontract, whether approved or not, shall relieve the Consultant of its obligations under this Contract except to the extent those obligations are in fact properly performed. In the event the RMOW approves a subcontractor, the Consultant shall secure compliance and enforce at its own expense for the benefit of the RMOW, each of the Consultant's contracts with subcontractors. Nothing contained in this Contract shall create any contractual relationship between the subcontractor and the RMOW. The Consultant agrees to bind every subcontractor to the terms and conditions of this Contract which are appropriate and applicable to the services to be provided by the subcontractor and the Consultant shall be fully responsible to the RMOW for the acts and omissions and errors of all subcontractors and of persons directly employed or contracted by them.

#### NOTICES

##### Notices

All notices, requests, demands and other communications required or permitted to be given under this Contract shall be in writing and delivered by hand, facsimile transmission, e-mail or prepaid registered mail (return receipt requested) to the party to which it is to be given as follows:

If to the RMOW:

Name of RMOW Representative

4325 Blackcomb Way, Whistler, BC, V8E0X5

[XXXXXXXX@whistler.ca](mailto:XXXXXXXX@whistler.ca)

If to the Consultant:

Consultant Primary Contact/Delegate

Consultant Address

Consultant Email.com

or at such other address as the party to whom the notice is sent may specify by notice given in accordance with the provisions of this section. Any such notice, request, demand or other communication given as aforesaid will be deemed to have been given, in the case of delivery by hand, when delivered, in the case of facsimile transmission or e-mail, when a legible facsimile or e-mail is received by the recipient if received before 5:00 p.m. on a day other than a Saturday, Sunday or statutory holiday in the Province of British Columbia or Canada (a "Business Day"), or on the next Business Day if such facsimile or e-mail is received on a day which is not a Business Day or after 5:00 p.m. on a Business Day, and in the case of delivery by prepaid registered mail, as aforesaid, on the date received. In the event of discontinuance of postal service due to strike, lockout, labour disturbance or otherwise, notice, demands, requests and other communications shall be delivered by hand or facsimile transmission or e-mail.

## DISPUTE RESOLUTION

### Order of proceedings

If there is any Dispute regarding the interpretation, performance or an alleged breach of this Contract, either party may give written notice of Dispute to the other party and the Consultant and the RMOW will meet within three (3) Business Days after the notice of Dispute is given and will attempt in good faith, and using reasonable efforts, to resolve the matter equitably to the satisfaction of both parties. If the parties cannot resolve the Dispute within ten (10) Business Days after they first meet, or if the parties fail to meet within 10 (ten) Business Days of the first request for a meeting, then with the consent of both parties the matter shall be submitted to mediation. Both parties agree not to make a request for arbitration or to commence litigation without first seeking agreement through the mediation process. The mediator shall be appointed by agreement of the parties. If the parties cannot resolve the dispute within 30 calendar Days following the mediation, then with the consent of both parties, the Dispute may be referred for determination through arbitration under the Arbitration Act (British Columbia), and in the event that both

parties do not so consent then either party may commence litigation to have the Dispute settled. If a Dispute is submitted for arbitration, the arbitration will be governed by the British Columbia International Commercial Arbitration Centre in accordance with its Domestic Commercial Arbitrations Rules of Procedure (“BCIAC Rules”). The arbitration shall be conducted by a single arbitrator appointed in accordance with BCIAC Rules in Vancouver, British Columbia and the award of the arbitrator including any award as to costs will be final and binding on the parties. The reference to arbitration will not preclude a party from applying to a British Columbia court of competent jurisdiction for interlocutory or interim relief.

#### Performance to continue during dispute

The Consultant will continue performance of this Contract during all Disputes with the RMOW, and notwithstanding any dispute the Consultant will comply with all written directions from the RMOW Representative relating to the provisions of the Services without prejudice to the Consultant’s right. The timely provision of the Services may not be delayed or postponed pending resolution of any Dispute.

#### COMMUNICATION

##### Representatives

Each party will maintain communication with the other party in accordance with their respective obligations under this Contract. In particular:

the Consultant will appoint a representative (the “Consultant’s Representative”) who will have the duty of instituting and maintaining communication with the RMOW as to the requirements of this Contract, plus an alternative representative to so act in the absence or inability to act of the Consultant’s Representative; and

the RMOW will appoint a representative (the “RMOW Representative”) who will have the duty of instituting and maintaining communication with the Consultant as to the requirements of this Contract, plus an alternative representative to so act in the absence or inability to act of the RMOW Representative.

##### Representative's Authority

Each party's representative will have the full power and authority to act on behalf of and to bind such party in all administrative issues and to carry out such party's obligations hereunder and each party's representative may be relied upon by the other party as the official representative of such party. Meetings between the Consultant’s Representative and the RMOW Representative may be held by telephone with the consent of all parties participating in such meetings.



#### Change of Representation

The Consultant shall obtain written approval from the RMOW prior to changing a representative(s) or any team members by submitting a written request with resumes of each newly requested individual. The RMOW is required to approve any costs for any such un-approved Consultants or sub-contractors or other representatives. The RMOW may change its representative or alternative representative by written notice to the Consultant at any time it deems necessary.

#### DELAYS IN PERFORMANCE

##### Force Majeure

A party is excused from performing its obligations under this Contract if, to the extent that, and for so long as:

such party's performance is prevented or delayed by an act or event (other than economic hardship, changes in market conditions, insufficiency of funds, or unavailability of equipment and supplies) that is beyond its reasonable control and could not have been prevented or avoided by its exercise of due diligence; and

such party gives written notice to the other party, as soon as practicable under the circumstances, of the act or event that so prevents such Party from performing its obligations.

By way of illustration, and not by limitation, acts or events that may prevent or delay performance (as contemplated by this Section) include: acts of God or the public enemy, acts of civil or military authority, acts of terrorism, embargoes, epidemics, war, riots, insurrections, fires, explosions, earthquakes, floods and abnormal weather conditions where the Services are being provided (as determined by comparison to the ten (10) year average conditions indicated by Environment Canada for the area in which the Services are being provided).

#### GENERAL

##### Right of Set Off

In addition to any other set-off provisions in this Contract, RMOW shall be entitled to set off against a reasonable amount due or owing to the Consultant by the RMOW and for which RMOW is liable by virtue of the Consultant's failure to comply with any statutory or regulatory requirement, duty or obligation arising out of the Services under this Contract, an amount sufficient to satisfy any indemnity obligations of

the Consultant in relation to such obligation as set out herein. RMOW shall also have the right to withhold any payment which relates to that portion of the Services which have not been provided by the Consultant in accordance with the terms of the Contract. When RMOW is satisfied that the Services has been performed in accordance with the terms and conditions of this Contract, RMOW will cause to be paid to the Consultant, any amount held back by the RMOW.

#### Successors and Assigns

This Contract ensures to the benefit of and binds the parties and their respective successors and permitted assigns.

#### Written Waivers

No indulgence or forbearance by either party shall be deemed to constitute a waiver of its rights to insist on performance in full and in a timely manner of all covenants of the other party; and any such waiver must be in writing and signed by the waiving party and then such waiver shall only be effective in a specific instance and for the specific purpose for which it is given.

#### Further Assurances

Each party will execute and deliver promptly all further documents and take all further action reasonably necessary or appropriate to give effect to the provisions of this Contract.

#### Remedies Cumulative

The rights and remedies under the Contract are cumulative and are not in addition to and not in substitution for any other rights and remedies available at law or in equity or otherwise.

#### Amendment

This Contract may not be amended except by a written instrument signed by the RMOW and the Consultant.

#### Entire Contract

This Contract and all documents contemplated by or delivered under or in connection with this Contract constitute the entire agreement between the parties and supersede all prior agreements, negotiations, discussions, undertakings, representations, warranties and understandings whether written or oral, express or implied, or otherwise.

#### Governing Law

This Contract and any dispute arising out of or in connection with this Contract shall be governed exclusively by and shall be enforced, construed and interpreted exclusively in accordance with the laws of British Columbia and the laws of Canada applicable in British Columbia which will be deemed to be the proper law of this Contract.

#### Attornment

The parties agree to submit to and hereby attorn to the exclusive jurisdiction of the courts of the Province of British Columbia for any action arising out of or in connection with this Contract.

#### Independent Legal Advice

The Consultant confirms it has had an opportunity to obtain independent legal advice in entering into this Contract.

#### Severability

Each provision of this Contract is intended to be severable and if any provision is determined by a court of competent jurisdiction to be illegal or invalid or unenforceable for any reason whatsoever such provision shall be severed from this Contract and will not affect the legality, validity or enforceability of the remainder of or any other provision of this Contract.

#### Time of Essence

Time shall be of the essence of this Contract.

#### No derogation.

The parties acknowledge and agree that nothing contained or implied in this Contract will be construed as limiting or prejudicing the rights and powers of RMOW in the exercise of its functions pursuant to the *Local Government Act* and the *Community Charter*, or any other right or power under any public or private statutes, bylaws, orders or regulations, all of which may be fully exercised as if this Contract had not been entered into.

#### Counterparts

This Contract may be executed by the parties in counterparts and may be executed and delivered by e-mail or fax and all such counterparts and e-mails and faxes together constitute one and the same agreement.

#### Survival

All obligations of each of the parties which expressly or by their nature survive termination or expiration of this Contract, will continue in full force and effect subsequent to and notwithstanding such termination or expiration or assignment and until they are satisfied or by their nature expire.

IN WITNESS WHEREOF this Contract has been executed and delivered by the parties as of the day and year first above written.

RESORT MUNICIPALITY OF WHISTLER

Per: \_\_\_\_\_

Authorized Signatory

Per: \_\_\_\_\_

Authorized Signatory

NAME OF CONSULTANT

Per: \_\_\_\_\_

Authorized Signatory

**SCHEDULE "A"**

**SERVICES TO BE PROVIDED**

1. **"Services"** means all civil, mechanical, electrical, and other engineering related tasks requested of Contractor name and sub-consultants by the RMOW, including construction administration, design, procurement and assistance with contractor administration, and any other work including all tasks, labour, materials, responsibilities, functions, duties and obligations of the Consultant to be supplied or performed as set forth in this Contract and "Schedule "E" Consultant Submissions", including those matters described in this Schedule A, including all and excluding only those items which are expressly identified as Services or tasks to be performed by or obligations owed by the RMOW.
2. See Schedules F: EXTRACTS OF RMOW PROCUREMENT DOCUMENTS, and SCHEDULE E: EXTRACTS OF CONSULTANT'S SUBMISSION.
3. The RMOW shall provide the Consultant with unrestricted access to all locations the Consultant requires for the provision of the Services.
4. RMOW acknowledges and agrees that certain parts of the Services cannot be performed in poor weather conditions and the Consultant shall be temporarily excused from the provision of the Services during such conditions. Consultant shall notify RMOW in such an event and the schedule of completion shall be adjusted as necessary to account for any such weather-related delays.

**SCHEDULE “B”****PAYMENT AND FEES FOR SERVICES**Contract Price

1. In consideration of the Consultant satisfactorily performing the Services , the RMOW will pay the Consultant the following sums plus goods and services tax (the “**Contract Price**”):

**Canadian funds as stated in each individual proposal with rates as per the accepted Schedule of Fees shown below. Exclusive of GST.**

The Consultant may invoice periodically for completed portions of the Services in accordance with in the invoicing procedures set out in the Contract.

2. The RMOW will reimburse the Consultant for expenses that are necessarily and reasonably incurred due to a change in scope and have been approved in advance by the RMOW. Reimbursement is subject to the submission of evidence of actual expenditures satisfactory to the RMOW and in accordance with applicable expenditure policies and procedures.
3. The pricing set out in this Schedule is inclusive of:
  - (a) All Living-Out-Allowances
  - (b) All travel charges and mileage
  - (c) All Equipment charges
  - (d) All document materials
4. Coordinates and site elevation shall be provided by RMOW at no cost to the Consultant.
5. Consultant to fill out and submit RMOW Direct Deposit Form.
6. Contractor Name Schedule of Fees below for YEAR as per below table. Escalation rates for future years will be % per year.

**SCHEDULE “C”****INSURANCE**

The Consultant shall, without limiting its obligations or liabilities herein and at its own expense, provide and maintain the following insurances:

<b>Type of Insurance</b>	<b>Consultant</b>
<i>Commercial General Liability (CGL)</i>	\$2 million per occurrence
<i>Automobile Liability</i>	\$2 million per occurrence
<i>Umbrella or Excess Liability</i>	To bring CGL or auto liability to \$2 million
<i>Professional Liability</i>	\$1 million per occurrence

**General**

- 1 The foregoing insurance shall be primary and not require the sharing of any loss by any coverage provider and/or insurer of RMOW.
- 2 The CGL insurance policy must be extended to cover the Consultant’s Blanket Contractual liability and contain a cross liability naming the RMOW and its officials, officers, employees, servants and agents as “Additional Insured.”
- 3 All required insurance shall provide RMOW with 30 days advance written notice of cancellation on a best efforts basis.
- 4 The Consultant hereby waives all rights of recourse against RMOW with regard to damage to the Consultant’s property.
- 5 Maintenance of such insurance shall not relieve the Consultant of liability under the indemnity provisions set forth in this Contract.
- 6 Any deductible amounts in the foregoing insurance which are payable by the policyholder shall be in an amount acceptable to the RMOW.

**SCHEDULE “D”**

**APPROVED SUBCONTRACTORS**

(as per each individual approved proposal)



**SCHEDULE “E”**

**CONSULTANT’S SUBMISSION**

(Individual proposals will be submitted by **Contractor** for each project)

**SCHEDULE “F”**

**RMOW PROCUREMENT DOCUMENTS**

(Relevant procurement documents or email correspondence accepting proposals)

## SCHEDULE “G”

### PRIVACY PROTECTION SCHEDULE

#### Definitions

1. In this Schedule,
  - (a) “**Act**” means the *Freedom of Information and Protection of Privacy Act* including any regulation made under it;
  - (b) “**contact information**” means information to enable an individual at a place of business to be contacted and includes the name, position name or title, business telephone number, business address, business email or business fax number of the individual;
  - (c) “**personal information**” means recorded information about an identifiable individual, other than contact information, collected or created by the Consultant as a result of the Contract or any previous Contract between the RMOW and the Consultant dealing with the same subject matter as the Contract;
  - (d) “**privacy course**” means the RMOW’s online privacy and information sharing training course or another course approved by the RMOW; and
  - (e) “**public body**” means “public body” as defined in the Act;
  - (f) “**third party request for disclosure**” means a subpoena, warrant, order, demand or request from an authority inside or outside of Canada for the unauthorized disclosure of personal information to which the Act applies;
  - (g) “**service provider**” means a person retained under a contract to perform services for a public body; and
  - (h) “**unauthorized disclosure of personal information**” means disclosure of, production of or the provision of access to personal information to which the Act applies, if that disclosure, production or access is not authorized by the Act.

#### Purpose

2. The purpose of this Schedule is to:
  - (a) enable the RMOW to comply with the RMOW’s statutory obligations under the Act with respect to personal information; and
  - (b) ensure that, as a service provider, the Consultant is aware of and complies with the Consultant’s statutory obligations under the Act with respect to personal information.

**Acknowledgements**

3. The Consultant acknowledges and agrees that
  - (a) it is a service provider and, as such, the requirements and restrictions established by Part 3 of the Act apply to the Consultant in respect of personal information;
  - (b) unless the Contract otherwise specifies, all personal information in the custody of the Consultant is and remains under the control of the RMOW; and
  - (c) unless the Contract otherwise specifies or the RMOW otherwise directs in writing, the Consultant may only collect, use, disclose or store personal information that relates directly to and is necessary for the performance of the Consultant's obligations, or the exercise of the Consultant's rights, under the Contract.

**Collection of Personal Information**

4. Unless the Contract otherwise specifies or the RMOW otherwise directs in writing, the Consultant may only collect or create personal information that relates directly to and is necessary for the performance of the Consultant's obligations, or the exercise of the Consultant's rights, under the Contract.
5. The Consultant must collect personal information directly from the individual the information is about unless:
  - (a) the RMOW provides personal information to the Consultant;
  - (b) the Contract otherwise specifies; or
  - (c) the RMOW otherwise directs in writing.
6. Where the Consultant collects personal information directly from the individual the information is about, the Consultant must tell that individual:
  - (a) the purpose for collecting it;
  - (b) the legal authority for collecting it; and
  - (c) the contact information of the individual designated by the RMOW to answer questions about the Consultant's collection of personal information.

**Accuracy of Personal Information**

7. The Consultant must make every reasonable effort to ensure the accuracy and completeness of any personal information to be used by the Consultant or the RMOW to make a decision that directly affects the individual the information is about.

**Requests for Access to Information**

8. If the Consultant receives a request for access to information from a person other than the RMOW, the Consultant must promptly advise the person to make the request to the RMOW unless the Contract expressly requires the Consultant to provide such access. If the RMOW has advised the Consultant of the name or title and contact information of an official of the RMOW to whom such requests are to be made, the Consultant must also promptly provide that official's name or title and contact information to the person making the request.

#### **Correction of Personal Information**

9. Within 5 Business Days of receiving a written direction from the RMOW to correct or annotate any personal information, the Consultant must annotate or correct the information in accordance with the direction.
10. When issuing a written direction under section 11, the RMOW must advise the Consultant of the date the correction request was received by the RMOW in order that the Consultant may comply with section 13.
11. Within 5 Business Days of correcting or annotating any personal information under section 11, the Consultant must provide the corrected or annotated information to any party to whom, within one year prior to the date the correction request was received by the RMOW, the Consultant disclosed the information being corrected or annotated.
12. If the Consultant receives a request for correction of personal information from a person other than the RMOW, the Consultant must promptly advise the person to make the request to the RMOW and, if the RMOW has advised the Consultant of the name or title and contact information of an official of the RMOW to whom such requests are to be made, the Consultant must also promptly provide that official's name or title and contact information to the person making the request.

#### **Protection of Personal Information**

13. Without limiting any other provision of the Contract, the Consultant must protect personal information by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure or disposal, including without limitation by ensuring that the integrity of the personal information is preserved. Without limiting the general nature of the foregoing sentence, the Consultant will ensure that all personal information is securely segregated from any information under the control of the Consultant or third parties to prevent unintended mixing of personal information with other information or access to personal information by unauthorized persons and to enable personal information to be identified and separated from the information of the Consultant or third parties.

#### **Storage of and Access to Personal Information**

14. The Consultant must comply with the requirements under the Act concerning storage of personal information outside of Canada, including, if required by the RMOW, by supporting the RMOW with completion of such assessments as may be required by

law.

15. The Consultant must not change the location where personal information is stored without receiving prior authorization of the RMOW in writing.
16. Without limiting any other provision of the Contract, the Consultant will implement and maintain an access log documenting all access to personal information, including a list of all persons that access any personal information. The Consultant will provide a copy of the access log to the RMOW upon request.

#### **Retention of Personal Information**

17. Unless the Contract otherwise specifies, the Consultant must retain personal information until directed by the RMOW in writing to dispose of it or deliver it as specified in the direction.

#### **Use of Personal Information**

18. Unless the RMOW otherwise directs in writing, the Consultant may only use personal information if that use is for the performance of the Consultant's obligations, or the exercise of the Consultant's rights, under the Contract. For clarity, unless the Contract otherwise specifies or the RMOW otherwise directs in writing, the Consultant must not anonymize, aggregate or otherwise alter or modify personal information, including by converting personal information into non-personal information, or analyze personal information (whether by manual or automated means) for any purpose, including for the purpose of developing insights, conclusions or other information from personal information.

#### **Metadata**

19. Where the Consultant has or generates metadata as a result of services provided to the RMOW, where that metadata is personal information, the Consultant will:
  - (a) not use it or disclose it to any other party except where the Contract otherwise specifies; and
  - (b) remove or destroy individual identifiers, if practicable.

#### **Disclosure of Personal Information**

20. Unless the RMOW otherwise directs in writing, the Consultant may only disclose personal information to any person other than the RMOW if the disclosure is for the performance of the Consultant's obligations, or the exercise of the Consultant's rights, under the Contract.
21. If in relation to personal information, the Consultant:
  - (a) receives a third-party request for disclosure;

- (b) receives a request to disclose, produce or provide access that the Consultant knows or has reason to suspect is for the purpose of responding to a third-party request for disclosure; or
- (c) has reason to suspect that an unauthorized disclosure of personal information has occurred in response to a third-party request for disclosure,

subject to section 24, the Consultant must immediately notify the RMOW.

22. If the Consultant receives a third-party request described in section 23(a) or (b) but is unable to notify the RMOW as required by section 23, the Consultant must instead:
- (a) use its best efforts to direct the party making the third-party request to the RMOW;
  - (b) provide the RMOW with reasonable assistance to contest the third-party request; and
  - (c) take reasonable steps to challenge the third party-request, including by presenting evidence with respect to:
    - (i) the control of personal information by the RMOW as a public body under the Act;
    - (ii) the application of the Act to the Consultant as a service provider to the RMOW;
    - (iii) the conflict between the Act and the third-party request; and
    - (iv) the potential for the Consultant to be liable for an offence under the Act as a result of complying with the third-party request.

#### **Notice of Unauthorized Disclosure**

23. In addition to any obligation the Consultant may have to provide the notification contemplated by section 30.5 of the Act, if the Consultant knows that there has been an unauthorized disclosure of personal information, the Consultant must immediately notify the RMOW. This notification must be written and include:
- (a) descriptions of the breach;
  - (b) any containment steps taken;
  - (c) contact information for a person who can provide answers on behalf of the public body; and
  - (d) steps the affected individual(s) can take to reduce their risk of harm.

#### **Compliance with the Act and Directions**

24. The Consultant must in relation to personal information comply with:

- (a) the requirements of the Act applicable to the Consultant as a service provider, including any regulation made under the Act and the terms of this Schedule; and
  - (b) any direction given by the RMOW under this Schedule.
25. The Consultant acknowledges that it is familiar with the requirements of the Act governing personal information that are applicable to it as a service provider.
26. The Consultant will provide the RMOW with such information as may be reasonably requested by the RMOW to assist the RMOW in confirming the Consultant's compliance with this Schedule.

### **Notice of Non-Compliance**

27. If for any reason the Consultant does not comply, or anticipates that it will be unable to comply in any respect, with any provision in this Schedule, the Consultant must promptly notify the RMOW of the particulars of the non-compliance or anticipated non-compliance and what steps it proposes to take to address, or prevent recurrence of, the non-compliance or anticipated non-compliance.

### **Termination of Contract**

28. In addition to any other rights of termination which the RMOW may have under the Contract or otherwise at law, the RMOW may, subject to any provisions in the Contract establishing mandatory cure periods for defaults by the Consultant, terminate the Contract by giving written notice of such termination to the Consultant, upon any failure of the Consultant to comply with this Schedule in a material respect.

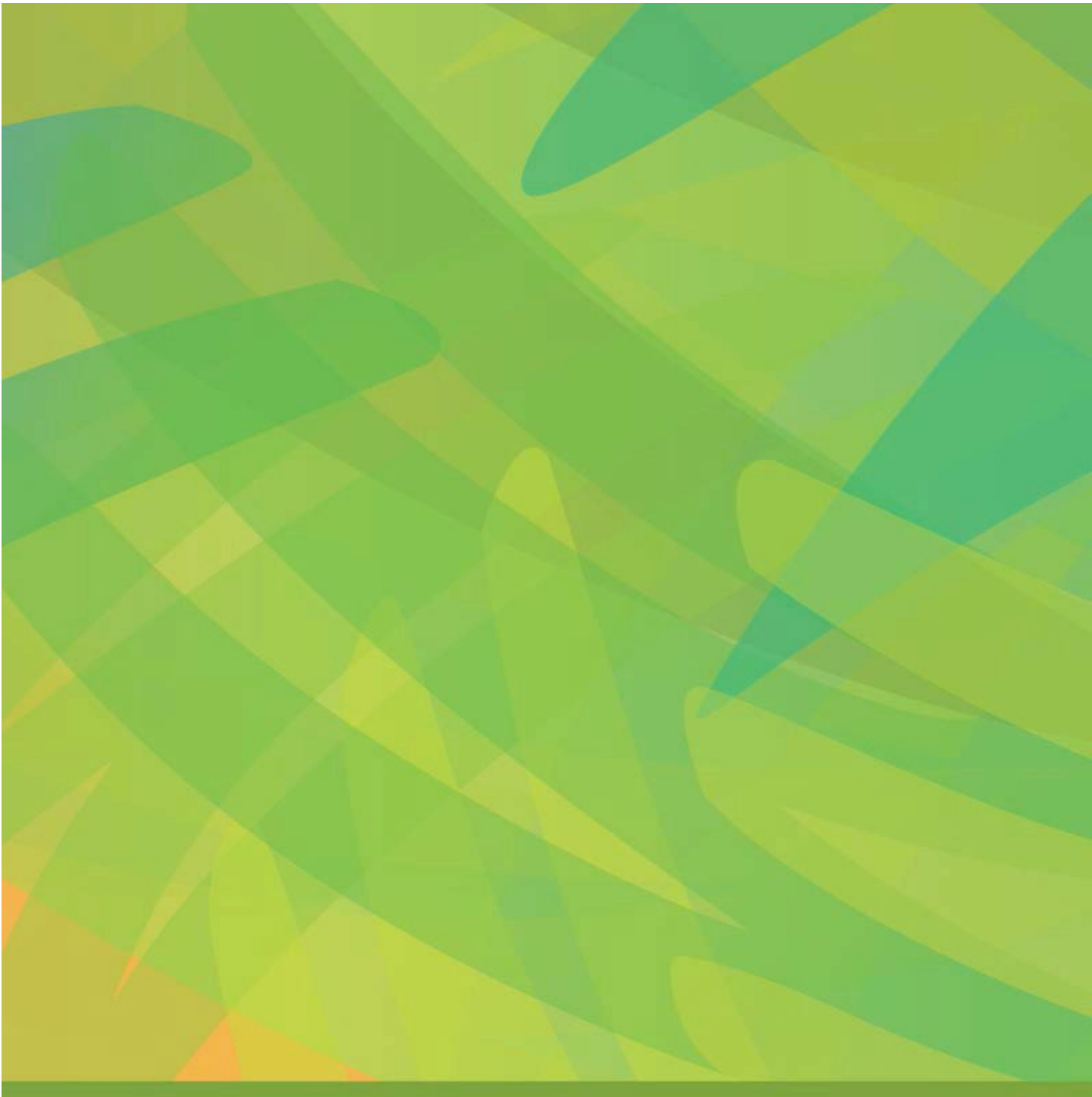
### **Interpretation**

29. In this Schedule, references to sections by number are to sections of this Schedule unless otherwise specified in this Schedule.
30. Any reference to "Consultant" in this Schedule includes any Sub-Consultant or agent retained by the Consultant to perform obligations under the Contract and the Consultant must ensure that any such Sub-Consultants and agents comply with the requirements of the Act applicable to them.
31. The obligations of the Consultant in this Schedule will survive the termination of the Contract.
32. If a provision of the Contract (including any direction given by the RMOW under this Schedule) conflicts with a requirement of the Act, including any regulation made under the Act, the conflicting provision of the Contract (or direction) will be inoperative to the extent of the conflict.



33. The Consultant must comply with the provisions of this Schedule despite any conflicting provision of the Contract or the law of any jurisdiction outside Canada.
34. Nothing in this Schedule requires the Consultant to contravene the law of any jurisdiction outside Canada unless such contravention is required to comply with the Act.





**The Resort Municipality of Whistler**

**Host Mountain Resort**  
2010 Olympic and Paralympic  
Winter Games

4325 Blackcomb Way  
Whistler, BC Canada V8E0X5  
[www.whistler.ca](http://www.whistler.ca)

TEL 604 932 5535  
TF 1 866 932 5535  
FAX 604 935 8109