

## Appendix B Proposal Requirements

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

### **TECHNICAL SUBMISSION**

Package 1: Transmittal Package for Technical Submission

Package 2: Technical Submission (Technical Review)

Package 3: Technical Submission (Scored Elements)

### **FINANCIAL SUBMISSION**

Package 4: Transmittal Package for Financial Submission

Package 5: Financial Submission (Financial Review)

Note:

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

Where a narrative explanation is required, Proponents should limit their narrative to 1,000 words per subsection in each case: for example, Section 3.3 Architecture (a) limit of 1,000 words, (b) (i) limit of 1,000 words, (b)(ii) limit of 1,000 words and so on.

Drawings should be provided electronically to scale and in PDF format, printable in 24" x 36" (Arch D) or 30" x 42" (Arch E1 size.)

Defined terms have the meaning set out in the RFP or the Final Draft Design-Build Agreement as the context may require.

References to schedules and appendices are to the schedules and appendices to the Final Draft Design-Build Agreement unless otherwise specified.



TABLE 1 TRANSMITTAL PACKAGE FOR TECHNICAL SUBMISSION

### Package 1: Transmittal Package for Technical Submission

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

- (a) Name and contact details for the Proponent's Contact Representative.  
Please note: The Proponent's Contact Representative will be the only person to receive communications from the Contact Person regarding the RFP.
  - (i) Name;
  - (ii) Employer;
  - (iii) Mailing/courier addresses;
  - (iv) Telephone number; and
  - (v) Email address.
- (b) Fill out the table below for the Key Individuals.

Individual's Name	Company Name	Role



## Package 1: Transmittal Package for Technical Submission

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- (c) Relationship Disclosure Form(s).
  - (d) Overview table of contents for all parts of the Proposal.
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## Package 2: Technical Submission

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

TABLE 2 TECHNICAL SUBMISSION

Section No.	Title	Contents (Package 2)
1.	PROPONENT TEAM	Proposal Requirements
1.1	Team Organization	(a) Provide an organization chart(s), at the corporate level and at the Key Individual level, showing the relationships between Proponent Team members (including major sub-trades and consultants),



Section No.	Title	Contents (Package 2)
		<p>reporting relationships, and any anticipated changes contemplated over the life of the Design-Build Agreement.</p> <p>(b) Describe the business relationships amongst the Proponent Team members (e.g., corporation, joint venture, partnership, subcontractor agreement, and consultant service agreement).</p>
2.	PROJECT APPROACH, MANAGEMENT AND CONSTRUCTION	Proposal Requirements
2.1	Approach and Project Schedule	<p>(a) Confirm the Proposal substantially meets the provisions of the RFP, including the requirements set out in Appendix B of the RFP and the Final Draft Design-Build Agreement.</p> <p>(b) Confirm if any Acceptable Equivalents, to the extent they have been previously accepted by the Owner as described in Section 7.14 of the RFP, have been used.</p> <p>(c) Provide a preliminary Time Schedule in the form of a Gantt chart, identifying (at a minimum) the following information, as well as written narrative explaining how the Design and Construction will be implemented to achieve the Target Substantial Completion Date</p>



Section No.	Title	Contents (Package 2)
		<p>and describing key milestones and decisions on how each align and work together:</p> <ul style="list-style-type: none"> <li>(i) Dates for Substantial Completion of the Building and Substantial Completion of the Project;</li> <li>(ii) Dates for Total Completion of the Building and Total Completion of the Project;</li> <li>(iii) Critical path items;</li> <li>(iv) Dates for development of plans and reports, including: <ul style="list-style-type: none"> <li>1. Health and Safety Plan;</li> <li>2. Project Management Plan;</li> <li>3. Quality Management Plan; and</li> <li>4. Commissioning Plan;</li> </ul> </li> <li>(v) A draft Submittal Schedule that includes dates for submission and Owner review of all Submittals at various stages as described in the Design-Build Agreement, and dates for user consultation group meetings;</li> <li>(vi) Timing of construction activities, including:</li> </ul>



Section No.	Title	Contents (Package 2)
		<ol style="list-style-type: none"> <li>1. site establishment and mobilization;</li> <li>2. securing approvals, including permits and licenses;</li> <li>3. major construction stages;</li> <li>4. testing, commissioning, integration, programming and training; and</li> <li>5. deficiency review period.</li> </ol>
2.2	Project Management Plan	<p>Provide an outline of the Project Management Plan that meets the requirements in Section 25.1 of the Design-Build Agreement and include</p> <ul style="list-style-type: none"> <li>• how the Proponent plans to coordinate with the City;</li> <li>• a description of construction constraints, risks and mitigation strategies, including proximity to an operating school and residential neighbourhood; and</li> <li>• approach to site access and egress, parking / laydown / hoarding and construction traffic management.</li> </ul>
2.3	Quality Management Plan	<p>Provide an outline of the Quality Management Plan that meets the requirements in Section 9.3 of the Design-Build Agreement.</p>



Section No.	Title	Contents (Package 2)
3	DESIGN AND CONSTRUCTION	Proposal Requirements
3.1	Building Design	<p>Provide a narrative, along with schematic drawings of the Building design, including:</p> <ul style="list-style-type: none"> <li>(a) exterior renderings demonstrating proposed 3-D massing, materials and image of the Building, including landscaping, and the context of neighbouring buildings. Provide exterior renderings demonstrating: <ul style="list-style-type: none"> <li>(i) school main entry showing front of school;</li> <li>(ii) schematic elevations for North, South, East and West;</li> <li>(iii) view of the school from multi-purpose fields; and</li> <li>(iv) overall aerial massing showing full Site development.</li> </ul> </li> <li>(b) interior renderings illustrating the materials, character and design of the Building for:: <ul style="list-style-type: none"> <li>(i) main entry;</li> <li>(ii) administration space;</li> <li>(iii) multi-purpose Space;</li> <li>(iv) learning commons with open collaboration;</li> </ul> </li> </ul>





Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(v) indigenous spaces; and</li> <li>(vi) large gymnasium</li> </ul>
		(c) Provide a completed MSSS Area Function Sheet, utilizing the template provided in the Data Room (MSSS Area Function Template Sheet), in Excel.
3.2	Site Development	<p>Provide a Site plan, together with narrative and information, sufficient to demonstrate the intent of the design and its conformance with the Design-Build Agreement, including:</p> <ul style="list-style-type: none"> <li>(a) a colour-coded circulation strategy illustrating travel routes and distances for: <ul style="list-style-type: none"> <li>(i) student drop-off and waiting areas for students commuting by school bus and parents;</li> <li>(ii) vehicles, pedestrians, bicyclists; staff and visitor arrival and drop-off at main entries; and</li> <li>(iii) service delivery and waste removal; as well as routes for firefighting access.</li> </ul> </li> </ul>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(b) Finished grades, surface parking plan, emergency supply storage, outdoor building systems enclosures, bicycle racks/storage, garbage and recycling bins, pedestrian connections to adjacent multi-use fields, snow storage areas, Existing School and bicycle paths; and</li> <li>(c) indication of existing easements.</li> </ul>
3.3	Architecture	<ul style="list-style-type: none"> <li>(a) Provide schematic level drawings, together with narrative and information, sufficient to demonstrate the intent of the design and its conformance with the Design-Build Agreement, including: <ul style="list-style-type: none"> <li>(i) all floor plans (1:200) consistent with the intent of the Statement of Requirements;</li> <li>(ii) floor plans (1:50) for the Drama Room, Gymnasium, Gymnasium Ancillary Space, Science Department, Technical (industrial) Education Spaces and a typical Learning Community;</li> <li>(iii) one north-south and one east-west building section and all four primary building elevations;</li> </ul> </li> </ul>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(iv) six building sections demonstrating the siting of the building within the sloping property and surrounding roads; and</li> <li>(v) building envelope details including typical foundation, wall, floor slab interface and parapet conditions.</li> </ul>
		<ul style="list-style-type: none"> <li>(b) Provide a narrative describing the: <ul style="list-style-type: none"> <li>(i) access to and from mechanical equipment and how the equipment can be maintained, modified, and replaced;</li> <li>(ii) exterior building envelope (wall assemblies and roof, windows, doors);</li> <li>(iii) exterior and interior finishes;</li> <li>(iv) elevator; and</li> <li>(v) outdoor spaces.</li> </ul> </li> </ul>
3.4	Energy and Sustainability	<ul style="list-style-type: none"> <li>(a) Provide an energy model and energy model report complete with summary of: <ul style="list-style-type: none"> <li>(i) energy model results;</li> </ul> </li> </ul>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(ii) summary of inputs as described in Schedule 8, and Schedule 8 Appendix 1;</li> <li>(iii) calculations;</li> <li>(iv) assumptions;</li> <li>(v) fuel and energy end-use breakdown, including heating, cooling, lights, fans, pumps, service water heating, and plug and process loads;</li> <li>(vi) energy use intensity total and by fuel and total and by fuel normalized to m<sup>2</sup> of building area;</li> <li>(vii) greenhouse gas use intensity total and by fuel and total and by fuel normalized to m<sup>2</sup> of building area, and by cost total and by fuel type; and</li> <li>(viii) a detailed description of modelling method, input details, and deliverable details described in the Design-Build Agreement Section 8: Energy including Appendix 1 in Schedule 8.</li> </ul>
	(b)	Describe, in the energy model report, the design approach and building systems in the building design that contribute to: <ul style="list-style-type: none"> <li>(i) energy consumption meeting the TEUI target; and</li> </ul>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(ii) thermal energy demand meeting the TEDI target; and</li> <li>(iii) greenhouse gas emissions meeting the GHGI target.</li> </ul> <p>(c) Confirm design details used in the energy model reflect the inputs provided by other disciplines that will include, but may not be limited to, architectural layout, massing and orientation, envelope assembly, mechanical system, heating, cooling, ventilation, lighting operating control, and electrical system.</p>
3.5	Structure	<p>(a) Provide a narrative with supporting drawings and design describing the structural system, floor and roof framing systems, and foundation systems and how they will meet the Statement of Requirements.</p>
3.6	Mechanical Systems	<p>(a) Provide a narrative describing the mechanical systems including the main energy sources, HVAC, plumbing, and fire protection and how they will meet the Statement of Requirements.</p> <ul style="list-style-type: none"> <li>(i) Include a description of how the equipment will be accessed for service and maintenance.</li> </ul> <p>(b) Provide mechanical drawings showing:</p>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(i) Locations of all mechanical rooms (1:200) including the room size as well as the equipment sizes to scale.</li> <li>(ii) Mechanical rooms showing all equipment locations and service clearances (1:50) using dashed lines.</li> <li>(iii) Routing for major duct and piping systems (1:200).</li> <li>(iv) Typical air distribution for each distinct type of space (1:50) including classrooms, multipurpose rooms, gymnasiums, shops, art rooms, music rooms, drama/theatre, and science rooms.</li> </ul>
		<ul style="list-style-type: none"> <li>(c) Provide schematic distribution diagrams outlining the distribution of major building systems including hydronic distribution systems, and duct mains. <ul style="list-style-type: none"> <li>(i) Clearly indicate how the primary plant systems (boilers, chillers, pumps, etc.), will be connected, including control valves, isolation valves, chemical treatment, flow control, etc.</li> </ul> </li> </ul>
3.7	Electrical Systems	<ul style="list-style-type: none"> <li>(a) Provide a narrative including supporting drawings and designs describing the following systems and how they will meet the</li> </ul>



Section No.	Title	Contents (Package 2)
		<p>Statement of Requirements. The narrative should include the following information:</p> <ul style="list-style-type: none"> <li>(i) acknowledge adherence to design and building codes and standards;</li> <li>(ii) description of proposed BC Hydro and Telus/ Rogers incoming service;</li> <li>(iii) description of the power distribution system including emergency and UPS branches;</li> <li>(iv) load calculations with confirmation of spare capacity at all levels of the power distribution and emergency generator;</li> <li>(v) description of fire alarm system and sequence of operations;</li> <li>(vi) description of lighting concepts with light level and lighting power density calculations for all major spaces; exterior lighting concept description and light level calculations;</li> <li>(vii) description of electrical and low-tension panels;</li> <li>(viii) description of typical lighting luminaires;</li> </ul>



Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(ix) description of lighting controls including occupancy sensors and daylight dimming;</li> <li>(x) description of communication systems;</li> <li>(xi) description of intrusion alarm/access control/CCTV systems;</li> <li>(xii) summary of AV systems; and</li> <li>(xiii) summary of commissioning activities.</li> </ul>
	(b)	Provide schematic layouts and drawings of these systems on floor plans indicating: <ul style="list-style-type: none"> <li>(i) preliminary site plan, including proposed routing and origin/location of;</li> <li>(ii) power and communication supply, conduits for portable and future connections, preliminary lighting concept and location of school signage;</li> <li>(iii) single line diagram;</li> <li>(iv) floor plan with electrical and communication room locations;</li> <li>(v) electrical and communication room preliminary layouts;</li> </ul>





Section No.	Title	Contents (Package 2)
		<ul style="list-style-type: none"> <li>(vi) preliminary cable tray layout;</li> <li>(vii) preliminary intrusion/access control/CCTV floor plans; and</li> <li>(viii) electrical schematic drawings for electrical, lighting, lighting controls,</li> <li>(ix) voice/data/AV for the following major spaces; <ul style="list-style-type: none"> <li>• typical classroom;</li> <li>• main lobby;</li> <li>• gymnasium;</li> <li>• technology shop;</li> <li>• music;</li> <li>• learning commons;</li> <li>• multipurpose;</li> <li>• stage/drama; and</li> </ul> </li> </ul>
		(c) science classroom.



Section No.	Title	Contents (Package 2)
3.8	Civil Works	<ul style="list-style-type: none"> <li>(a) Provide a narrative, including supporting drawings and design, describing the plan for the on-Site and off-Site civil works and how they will meet the Statement of Requirements.</li> <li>(b) Provide a Site utilities plan.</li> </ul>
3.9	Landscape Architecture	<ul style="list-style-type: none"> <li>(a) Provide 3-D view of outdoor learning spaces.</li> <li>(b) Provide a landscape plan for the Site, including plantings, paving and site furnishings and multipurpose fields.</li> <li>(c) Provide a planting list including quantities for all species proposed for the Site.</li> </ul>
3.10	Equipment	<p>Provide the following:</p> <ul style="list-style-type: none"> <li>(a) a summary of the processes and activities that will be undertaken to ensure all equipment, including IMIT components, are received, placed, installed and commissioned prior to Substantial Completion; and</li> <li>(b) outline of the roles and timing the Design-Builder would expect the Owner to provide to support achieving the above.</li> </ul>





TABLE 3: TECHNICAL SUBMISSION (SCORED ELEMENTS)

Section No.	Title	Contents (Package 3, Scored Elements)
4.	SCORED ELEMENTS	Proposal Requirements
		Provide a narrative describing the strategy for each of the Scored Elements described in Appendix A. Include diagrams, plans, renderings and/or sketches showing concepts and strategies in the design to support the narrative, as required.
4.1	Scored Elements	<p>(a) Section 4.1 a: Part 1 - Site Design</p> <ul style="list-style-type: none"> <li>(i) Site Plan</li> <li>(ii) Sloped Site</li> <li>(iii) Traffic Circulation</li> <li>(iv) Outdoor Learning Spaces</li> </ul> <p>(b) Section 4.1 b: Part 2 - Building Exterior</p> <ul style="list-style-type: none"> <li>(i) Enhances the School Identity</li> <li>(ii) Exterior Cladding</li> </ul> <p>(c) Section 4.1 c: Part 3 - Building Interior</p> <ul style="list-style-type: none"> <li>(i) Student Centred Learning</li> <li>(ii) Expansion Opportunities</li> </ul>



Section No.	Title	Contents (Package 3, Scored Elements)
		(iii) Interior Designs

### Package 4: Transmittal Package for Financial Submission

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

- A letter confirming that the Nominal Cost of the Proposal is within the Design-Build Price Ceiling and is valid for a period of 90 days beyond the date of the Financial Submission;
- Confirmation of the Scope Ladder items used, if any, to achieve the Design-Build Price Ceiling;
- Confirmation that there have been no changes to the Proponent Team other than those with respect to which the Proponent has complied with Section 7.11 of the RFP; and
- One (1) fully executed copy of Appendix C – Proposal Declaration Form.

### Package 5: Financial Submission

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

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



## Package 5: Financial Submission

- (a) Confirmation of insurance and bonding undertakings; and
  - (b) Completed Form A1 – Breakdown of Contract Price and Monthly Progress Payments.
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Section No.	Title	Contents (Package 5, Financial Submission)
5.	Basis of Financial Submission	
5.1	Proposal Authorization	Provide a certified copy of board resolutions or other legally binding evidence where applicable from the Design-Builder approving the Proposal and authorizing submission of the Proposal in response to this RFP.
5.2	Insurance and Bonding	<p>(a) Demonstrate the insurability of the Proponent by providing written confirmation, generally in the form of the Insurance Undertakings contained in Appendix L and Appendix M, from insurers that the following insurance coverage will be available for the Project if the Proponent is awarded the Design-Build Agreement:</p> <p>(i) Commercial general liability insurance coverage of not less than \$25 million inclusive per occurrence; \$25 million general aggregate for bodily injury; death and damage to property including loss of use thereof; product/completed operations liability with a limit of \$25 million annual aggregate; and</p> <p>(ii) Professional liability insurance coverage of not less than \$5 million per claim and \$5 million aggregate.</p>



Section No.	Title	Contents (Package 5, Financial Submission)
<p>Note: Only the Preferred Proponent will be required to submit a completed Appendix H in advance of Contract Execution.</p> <p>(b) Demonstrate the bondability of the Proponent by providing written confirmation, generally in the form of the Bonding Undertaking contained in Appendix K, from a surety that the Proponent will be able to obtain a performance bond in a sum equal to 50% of the Nominal Cost of the Proposal, and a labour and material payment bond in a sum equal to 50% of the Nominal Cost of the Proposal, written by a surety, or sureties, acceptable to the Owner, authorized to conduct business in British Columbia, if the Proponent is awarded the Design-Build Agreement.</p> <p>(c) The Proponent may alternatively provide the surety's standard form Consent of Surety or Agreement to Bond in respect of a commitment to provide the required performance and labour and material payment bond.</p>		
6.	Proposal Price	
6.1	Price Validity	Confirm all prices listed in the Proposal will remain valid for the period of 90 days after the Submission Time for Financial Submissions.





Section No.	Title	Contents (Package 5, Financial Submission)
6.2	Scored Elements	Describe the impact on the Scored Elements if they changed in the development of the Financial Submission. If there were changes, submit the revised Package 3, Scored Elements.
6.3	Form A1 – Breakdown of Contract Price and Monthly Progress Payments	<p>Proponents must submit Form A1 – Breakdown of Contract Price and Monthly Progress Payments electronically. Form A1 will include:</p> <ul style="list-style-type: none"> <li>(a) The breakdown of the contract price adding up to the Nominal Cost of the Proposal; and</li> <li>(b) Estimated monthly progress payments over the construction schedule: <ul style="list-style-type: none"> <li>(i) Estimated progress payments must coincide with work completed based on the Time Schedule.</li> </ul> </li> </ul> <p>The Proponent's Form A1 should be consistent with the following:</p> <ul style="list-style-type: none"> <li>(ii) Produced using the template supplied by the Owner with no changes or entries other than as indicated in the model;</li> <li>(iii) Produced in Microsoft Excel version 2010 or newer;</li> <li>(iv) Except where otherwise expressly indicated, include all taxes other than GST;</li> <li>(v) Be expressed in Canadian dollars; and</li> </ul>



Section No.	Title	Contents (Package 5, Financial Submission)
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(vi) Not include any hidden or password-protected cells or sheets.

All sheets should be printable, clearly and legibly, on 8.5" x 11" paper including row and column references on each page.

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