



**TOWN OF COMOX**

1809 Beaufort Avenue

Comox, BC V9M 1R9

**REQUEST FOR PROPOSALS**

Building and Land Use Application Software

RFP No. 2025.02

## Table of Contents

Part 1	Invitation and Submission Instructions .....	1
1.1	Invitation to Proponents .....	1
1.2	RFP Contact.....	2
1.3	Contract for Deliverables .....	2
1.4	Submission Instructions.....	3
Part 2	Evaluation, Negotiation, and Award .....	4
2.1	Timeline .....	4
2.2	Evaluation of Proposals & Award of Agreement .....	4
Part 3	Terms and Conditions of the RFP Process .....	6
3.1	General Information and Instructions .....	6
3.2	Communication after Issuance of RFP .....	7
3.3	Notification and Debriefing .....	8
3.4	Confidential Information .....	9
3.5	Procurement Process Non-Binding.....	9
Part 4	RFP Particulars .....	10
4.1	Scope of Services .....	10
4.2	Software Modules: .....	10
4.3	Vendor Requirements.....	11
4.4	Solution Requirements .....	12
4.5	Implementation and Training Requirements.....	13
Part 5	Methodology and Work Plan.....	13
5.1	Implementation .....	13
5.2	Timelines and Scheduling.....	14
5.3	Training and Ongoing Support.....	14
Part 6	Mandatory Requirements.....	15
Appendix A	– System Requirements Matrix.....	16
Appendix B	– Submission Form.....	16
Appendix C	– Pre-Conditions of Award.....	16
Appendix D	- Evaluation Criteria .....	16
Appendix E	– Pricing.....	19
Appendix F	– Experience & References.....	21

# Part 1 Invitation and Submission Instructions

## 1.1 Invitation to Proponents

### 1.1.1 Invitation

This Request for Proposals (the “RFP”) is an invitation by the Town of Comox (the “Town”) to prospective proponents to submit proposals to supply, implement, and support a **Building and Land Use Application Software**, as further described in Section A of the RFP Particulars (Appendix A) (the “Deliverables”).

The purpose of this RFP is to identify a software solution that will streamline and automate the Building and Land Use Application Approval processes, enhance customer engagement, and improve operational efficiency.

The Town of Comox currently manages and tracks its Building and Land Use Applications through predominantly manual business processes. The Town has not had any technology to assist with a small staff complement while facing a large volume of development applications.

The Town is currently using tools such as Microsoft Excel to assist with project management and tracking of applications within the Towns network file storage. Excel is also currently used by planning staff to calculate and manage fee collection for applications. While the Town has a digital financial system and online payment system in place (A-MAIS and Stripe) they are currently used for the general ledger, taxation, accounts receivable and payable, not directly integrated with the approvals process. The need for software to support the approvals process through the management of deposits and development-based fees is crucial.

The Town currently has the following systems and technology standards in place:

Technology	Current Standard
Virtual Environment	Microsoft Azure
Host Hardware	Microsoft Azure
User Authentication	Azure Active Directory
Storage/Database	Individual application servers
Productivity Software	Office 365; Adobe Acrobat; Blue Beam
Financial Software	Amiga A-MAIS; Stripe
GIS	ESRI ArcGIS Online SaaS Environment

The implementation of Development Application Process Software has been identified as high priority for the Town and is driven by the following objectives:

- Replacing the manual current Building and Land Use Application process to meet the Town’s business needs of better process tracking, internal communication/collaboration, and timeliness;
- The need to procure and implement a long-term business solution that supports continual innovation and supports implementation of best practices (ex. streamlining and automating standard business transactions, enhanced flow of information and digital capabilities, etc.);

- Generate operational efficiencies through the use of technologies, integrated systems and workflows;
- Break down information silos;
- Improved and accurate reporting available to staff in a self-served manner;
- Enhanced customer experiences with the addition of online business functionality;

### 1.1.2 Proponent must be Single Entity

The proponent must be a single legal entity that, if selected, intends to negotiate and enter into the contract with the Town. If the proposal is being submitted jointly by two (2) or more separate entities, the proposal must identify only one of those entities as the “proponent”. The proponent will be responsible for the performance of Deliverables.

### 1.1.3 RFP Information

RFP documents will be available on BC Bid at <https://www.bcbid.gov.bc.ca/>. This will enable the proponent to receive addenda email notifications and download addenda.

## 1.2 RFP Contact

To contact the Town in relation to this RFP, proponents must initiate communication electronically through the contact below. The Town will not accept any proponent’s communications by any other means, except as specifically stated in this RFP. For the purposes of this procurement process, the “RFP Contact” will be:

Randy Houle  
Director of Development Services  
Town of Comox  
rhoule@comox.ca  
250-331-6444

Proponents should only contact the RFP Contact where specifically instructed to in this RFP. All other communication in relation to this RFP, up to and including the submission of the proposal, must be as described above. Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials, or other representatives of the Town, other than the RFP Contact. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent’s proposal.

## 1.3 Contract for Deliverables

### 1.3.1 Type of Contract

The selected proponent will be requested to enter into direct contract negotiations to finalize an agreement with the Town for the provision of the Deliverables.

### 1.3.2 Term of Contract

The terms of the agreement will be in effect until the completion of the Deliverables planned to be December 31<sup>st</sup>, 2025.

## 1.4 Submission Instructions

### 1.4.1 Submission of Proposals

Proposals must be submitted as one complete PDF file directly to town@comox.ca or hard copy packages must be received to 1809 Beaufort Ave, Comox BC, V9M 1R9 prior to the submission deadline. Submissions by other methods will not be accepted. In the event of any technical issues, proponents should contact the RFP contact.

All electronic submissions should have as the subject in bold capitalized letters: **SUBMISSION FOR REQUEST FOR PROPOSALS NO. 2025.02**

All copies received in hard copy should be submitted in a sealed envelope with the following in bold and capitalized letters: **ATTN: RANDY HOULE. SUBMISSION FOR REQUEST FOR PROPOSAL NO. 2025.02.**

### 1.4.2 Proposals to be Submitted on Time

Proposals must be finalized and received on or before the Submission Deadline. The time of receipt of proposals shall be determined by the email receipt time stamp. Late submissions will not be accepted and will be disqualified as late.

Proponents are cautioned that the timing of submission is based on when the proposal is received at the Town, not when a proposal is submitted by a proponent. As transmission can be delayed due to file transfer size, transmission speed or other technical factors, proponents should plan to submit proposals well in advance of the Submission Deadline to avoid submitting late due to technical issues. Proponents submitting near the Submission Deadline do so at their own risk.

The Town will send a confirmation email to the proponent advising when the proposal was submitted and received successfully. If you do not receive a confirmation email, contact the RFP contact.

### 1.4.3 Proposals to be Submitted in Prescribed Format

Proposal materials should be prepared and submitted in accordance with the instructions in the RFP.

### 1.4.4 Amendment of Proposals

Proponents may amend their proposals prior to the Submission Deadline. However, the proponent is solely responsible for ensuring that the amended proposal is received by the Town by the Submission Deadline.

### 1.4.5 Withdrawal of Proposals

At any time throughout the RFP process until the execution of a written agreement for provision of the Deliverables, a proponent may withdraw a submitted proposal. Prior to the Submission Deadline, proponents may withdraw a submitted proposal by confirming by email to the RFP contact. To withdraw

a proposal after the Submission Deadline, a notice of withdrawal must be sent to the RFP Contact and must be signed by an authorized representative of the proponent.

## Part 2 Evaluation, Negotiation, and Award

### 2.1 Timeline

Proposed Schedule Component	Timeline
Issue RFP	June 9 <sup>th</sup> 2025
Deadline for Questions	June 20 <sup>th</sup> 2025
Submission Deadline	July 7 <sup>th</sup> 2025 @ 14:00PDT
Proponent Shortlisting & Notification	July 14 <sup>th</sup> 2025
Interviews & Demonstrations	Week of July 21 <sup>st</sup> 2025
Proponent Selection	July 30 <sup>th</sup> 2025
Project Kick off	August 4 <sup>th</sup> 2025
Complete Design & Implementation	November 1 <sup>st</sup> 2025
Start Testing & Staff Training	November 10 <sup>th</sup> 2025
Public Launch	December 31, 2026

The RFP timetable is tentative only and may be changed by the Town at any time. For greater clarity, business days mean all the days that the Town is open for business.

### 2.2 Evaluation of Proposals & Award of Agreement

The Town will conduct the evaluation of Proposals and selection of a successful Proponent in accordance with the process detailed in this Section. Evaluation of Proposals will be by a Proposal Evaluation Committee. The Town’s intent is to enter into an Agreement with the Proponent who has met all mandatory criteria and minimum scores, and who has the highest overall ranking based on the following evaluation process:

#### 2.2.1 Compliance Review

Prior to the evaluation of Proposals, the Town will review each Proposal to determine if it complies with the submission instructions and mandatory requirements provided in this RFP. If, in the sole discretion of the Town, a Proposal does not materially comply with the requirements set out in this RFP and/or the Town determines that there is a material or perceived Conflict of Interest, the Proposal will be disqualified from further consideration.

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration in the evaluation process:

Mandatory Criteria	
1	The Proposal must be received by Closing Date and Time: July 7 <sup>th</sup> 2025 @ 14:00PDT
2	The Proposal must be submitted in accordance with the requirements of <a href="#">Section 1.4 – Submission Instructions</a>
3	The Proposal must include a completed <a href="#">Appendix A – Software Requirements Matrix</a> indicating that <b>at least 80%</b> of all functions identified as “Must” are offered as part of the proposed System, either as Out-of-the-box, Software Configuration, or Software Customization

4	Proposals must offer post-Implementation Period support
5	Proposals must offer post-Implementation Period System maintenance that provides regular maintenance (minor upgrades and hot fixes) as well as major software revision upgrades.
6	Proposals must include the following completed forms: <ul style="list-style-type: none"> <li>• <a href="#">System Requirements Matrix (Appendix A)</a></li> <li>• <a href="#">Submission Form (Appendix B)</a></li> <li>• <a href="#">Pricing Tables (Appendix E)</a></li> <li>• <a href="#">Experience &amp; References (Appendix F)</a></li> <li>• <a href="#">Privacy Impact Assessment (Appendix G)</a></li> </ul>
7	Proposals must include detailed pricing breakdown as per requirements listed in Appendix E - Pricing

### 2.2.2 Evaluation of Rated Criteria

Proposals that are deemed compliant will be further evaluated. The evaluation team will establish this criteria score using [Appendix D – Evaluation Criteria](#).

### 2.2.3 Proposed System Interviews & Demonstration

The top three (3) scoring Proponents will be shortlisted and invited to demonstrate their proposed System solution. Demonstration presentations will be conducted virtually through videoconference with screensharing. Shortlisted Proponents will be provided with a script that identifies the functionality expected to be demonstrated; such functionality will be based on those features that all shortlisted Proponents have indicated as being currently available (as of the Closing Date & Time) in their Proposed System.

The Town reserves the right to shortlist fewer than three (3) Proponents if the cumulative scores are not sufficient.

### 2.2.4 Selection of Highest Scoring Proponent

At the conclusion of the System Interviews & Demonstration, the Town’s evaluation team will rank Proponents according to their score and demonstration. Subject the express and implied rights of the Town, the highest scoring Proponent will be selected to enter into an Agreement.

If two (2) or more Proponents have an equal total weighted score which is the highest score, those Proponent may be asked to submit a Best and Final Offer.

### 2.2.5 Contract Negotiation Process

Any negotiations will be subject to the process rules contained in the [Terms and Conditions of the RFP Process \(Part 3\)](#) and will not constitute a legally binding offer to enter into a contract on the part of the Town or the proponent, and there will be no legally binding relationship created with any proponent prior to the execution of a written agreement. Negotiations may include requests by the Town for supplementary information from the proponent to verify, clarify, or supplement the information provided in its proposal or to confirm the conclusions reached in the evaluation, and may include requests by the Town for improved pricing or performance terms from the proponent.

### 2.2.6 Time Period for Negotiations

The Town intends to conclude negotiations and finalize the agreement with the top-ranked Proponent during the Contract Negotiation Period, commencing from the date the Town invites the top-ranked Proponent to enter negotiations. A Proponent invited to enter into direct contract negotiations should therefore be prepared to satisfy the pre-conditions of award listed in [Appendix C of the RFP Particulars](#).

### 2.2.7 Failure to Enter into Agreement

If the pre-conditions of award listed in [Appendix C of the RFP Particulars](#) are not satisfied or if the parties cannot conclude negotiations and finalize the agreement for the Deliverables within the Contract Negotiation Period, the Town may discontinue negotiations with the top-ranked proponent and may invite the next-best-ranked proponent to enter into negotiations. This process will continue until an agreement is finalized, or until the Town elects to cancel the RFP process.

## Part 3 Terms and Conditions of the RFP Process

### 3.1 General Information and Instructions

#### 3.1.1 Proponents to Follow Instructions

Proponents should structure their proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a proposal should reference the applicable section numbers of this RFP. A proponent who submits conditions, options, variations, or contingent statements either as part of its proposal or after receiving notice of selection, may be disqualified.

#### 3.1.2 Proposals in English

All proposals are to be in English only.

#### 3.1.3 No Incorporation by Reference

The entire content of the proponent's proposal should be submitted in a fixed format, and the content of websites or other external documents referred to in the proponent's proposal but not attached will not be considered to form part of its proposal.

#### 3.1.4 Past Performance

In the evaluation process, the Town will assess the proponent's past performance and contact references provided in the submission package. Preference will be given to vendors that provide Canadian-based references (ideally, within British Columbia).

#### 3.1.5 Information in RFP Only an Estimate

The Town and its advisers make no representation, warranty, or guarantee as to the accuracy of the information contained in this RFP or issued by way of addenda. Any quantities shown or data contained in this RFP or provided by way of addenda are estimates only and are for the sole purpose of indicating

to proponents the general scale and scope of Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

### 3.1.6 Proponents to Bear Their Own Costs

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

### 3.1.7 Proposal to be Retained by the Town

The Town will not return the proposal or any accompanying documentation submitted by a proponent.

## 3.2 Communication after Issuance of RFP

### 3.2.1 Proponents to Review RFP

Proponents should promptly examine all of the documents comprising this RFP and may direct questions or seek additional information in writing through the bidding system OR by email to the RFP Contact on or before the Deadline for Questions. No such communications are to be sent or initiated through any other means. The Town is under no obligation to provide additional information, and the Town is not responsible for any information provided by or obtained from any source other than the RFP Contact or the bidding system. It is the responsibility of the proponent to seek clarification on any matter it considers to be unclear. The Town is not responsible for any misunderstanding on the part of the proponent concerning this RFP or its process.

### 3.2.2 All New Information to Proponents by Way of Addenda

This RFP may be amended only by addendum in accordance with this section. If the Town, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all proponents by addendum. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by the Town.

### 3.2.3 Post-Deadline Addenda and Extension of Submission Deadline

If the Town determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, the Town may extend the Submission Deadline for a reasonable period of time.

### 3.2.4 Verify, Clarify, and Supplement

When evaluating proposals, the Town may request further information from the proponent or third parties in order to verify, clarify or supplement the information provided in the proponent's proposal. The Town may revisit, re-evaluate, and rescore the proponent's response or ranking on the basis of any such information.

### 3.3 Notification and Debriefing

#### 3.3.1 Notification to Other Proponents

Once an agreement is executed by the Town and a proponent, the other proponents may be notified directly in writing of the outcome of the procurement process.

#### 3.3.2 Proponent Not to Communicate with Media

Proponents must not at any time directly or indirectly communicate with the media in relation to this RFP or any agreement entered into pursuant to this RFP without first obtaining the written permission of the RFP Contact.

#### 3.3.3 No Lobbying

Proponents must not, in relation to this RFP or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of the successful proponent(s).

#### 3.3.4 Illegal or Unethical Conduct

Proponents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion, or collusion. Proponents must not engage in any unethical conduct, including lobbying, as described above, or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials, or other representatives of the Town; deceitfulness; submitting proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process provided for in this RFP.

#### 3.3.5 Supplier Suspension

The Town may suspend a supplier from participating in its procurement processes for prescribed time periods based on past performance or based on inappropriate conduct, including but not limited to the following:

1. illegal or unethical conduct as described above;
2. the refusal of the supplier to honour its submitted pricing or other commitments;
3. engaging in litigious conduct, bringing frivolous or vexatious claims in connection with the Client's procurement processes or contracts, or engaging in conduct obstructive to a fair competitive process; or
4. any conduct, situation, or circumstance determined by the Town, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

In advance of a decision to suspend a supplier, the Town will notify the supplier of the grounds for the suspension and the supplier will have an opportunity to respond within a timeframe stated in the notice. Any response received from the supplier within that timeframe will be considered by the Town in making its final decision.

## 3.4 Confidential Information

### 3.4.1 Confidential Information of the Town

All information provided by or obtained from the Town in any form in connection with this RFP either before or after the issuance of this RFP.

1. is the sole property of the Town and must be treated as confidential;
2. is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract for the Deliverables;
3. must not be disclosed without prior written authorization from the Town; and
4. must be returned by the proponent to the Town immediately upon the request of the Town.

### 3.4.2 Confidential Information of Proponent

A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Town. The confidentiality of such information will be maintained by the Town, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by the Town to advise or assist with the RFP process, including the evaluation of proposals. If a proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted to the RFP Contact.

## 3.5 Procurement Process Non-Binding

### 3.5.1 No Contract A and No Claims

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

this RFP will not give rise to any Contract A–based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and neither the proponent nor the Town will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract or failure to honour a proposal submitted in response to this RFP.

### 3.5.2 No Contract until Execution of Written Agreement

This RFP process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service will be created between the proponent and the Town by this RFP process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

### 3.5.3 Non-Binding Price Estimates

While the pricing information provided in proposals will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the proposals and the

ranking of the proponents. Any inaccurate, misleading, or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation or ranking or the decision of the Town to enter into an agreement for Deliverables.

### 3.5.4 Cancellation

The Town may cancel or amend the RFP process without liability at any time.

### 3.5.5 3.6 Governing Law and Interpretation

These Terms and Conditions of the RFP Process (Part 3):

- are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
- are to be governed by and construed in accordance with the laws of the province of British Columbia and the federal laws of Canada applicable therein.

## Part 4 RFP Particulars

### 4.1 Scope of Services

The Scope of Work described in this section is not intended to be limiting or exhaustive. The proponent should develop a detailed project methodology and identify additional project tasks necessary for the successful completion of the project.

The successful proponent will be responsible for providing a software for the Town of Comox which provides the following components/modules and services:

### 4.2 Software Modules:

#### 4.2.1 Building and Land Use Applications:

The proposed System's building and land use application requirements are the F2 through F6 requirements in [Appendix A – Systems Requirements Matrix](#). There are many different types of related permits, broadly classified into the following application types:

- Official Community Plan (OCP) Amendments
- Zoning Bylaw amendments
- Subdivision
- Development Permit (including delegated)
- Development Variance Permit (including delegated)
- Temporary Use Permit
- Building Permit (including but not limited to demolition permits, plumbing permits, and manufactured home permits)
- Sign Permit

#### 4.2.2 Online Customer Portal

The proposed System's Online Customer Portal requirements are the F7 requirements in [Appendix A – System Requirements Matrix](#).

The full-service Online Customer Portal is intended to allow citizens to acquire and pay for Town services in the following categories:

- a) Land Use Applications – submission, status monitoring, payments, uploading of documentation
- b) Building Inspection – online submission, tracking, and self inspection scheduling request
- c) Bylaw Enforcement & Municipal Ticketing – submission, status monitoring, follow-up actions taken by Town, and payment
- d) Business Licensing – application, renewal, and payment

The Portal should also allow interested members of public/citizens to:

- View the status of building and land use applications where the Town deems the information as public viewable; and
- Search properties to display publicly available legal description and other public information useful to constituents.

#### 4.2.3 Value Add

While the primary purpose of this RFP is the acquisition of a Building and Land Use Application Software, the Town anticipates future growth and utilization of modules that will accommodate the following:

##### 4.2.3.1 Business Licensing

The proposed System's business licensing requirements are the VA1 requirements in [Appendix A – System Requirements Matrix](#). These requirements address issuing licenses and license invoices, license renewals, managing & tracking licenses, account management, license payment in-person and online, e-billing, online license application and management reporting. The requirements include LCRB licensing referrals.

For more information on BC Intermunicipal Business Licensing (related to requirement VA1.2 in [Appendix A – System Requirements Matrix](#)) please see the link below.

<https://www.comox.ca/sites/default/files/2023-06/Bylaw%201529%20-%20Intermunicipal.pdf>

##### 4.2.3.2 Bylaw Enforcement & Municipal Ticketing

The proposed System's bylaw enforcement process requirements are the VA2 requirements in [Appendix A – System Requirements Matrix](#)

##### 4.2.3.3 Online Billing

The proposed System's Online Billing requirements are outlined in the Functional Requirements tab of [Appendix A – System Requirements Matrix](#).

#### 4.3 Vendor Requirements

The vendor should provide the required information and answer the questions about software functionality as outlined in [Appendix A – System Requirements Matrix](#).

The vendor and software must meet all legislation and regulation standards within British Columbia for online building and land use permit software.

- Design and Implement the Building and Land Use Application Software, including installation of software, configuration, and training for Town staff.
- Provide detailed schedule and protocol for Building and Land Use Application Software maintenance.
- Provide on-going and unlimited number of support requests in a timely manner of a defined period of time.
- Data residency and back ups must be within Canada.
- Preference will be given to Vendors who are also Canadian based.
- Data must be protected and regular back up (in Canada) procedure must be scheduled, performed and documented.
- Provide detailed project plan outlining objectives, methods, resources.
- Provide detailed Project Team outlined including names, roles, responsibilities, and back up support.
- Provide references from successful implementation projects within Canada (preference given to references within British Columbia)

#### 4.4 Solution Requirements

The software should meet the high-level software functionality items outlined in [Appendix A – System Requirements Matrix](#). The functionalities labeled ‘Must Have’ are top priority items for the Town, whereas ‘Important’ and ‘Desirable’ are less important to meet the needs of the Town. The Proposal must include a completed [Appendix A – System Requirements Matrix](#), indicating that at minimum, 80% of all ‘Must Have’ functionalities are offered as part of the proposed system.

- Cloud-hosted environment (within Canada) or ability to pivot to cloud-hosted environment at later date.
- Desktop (PC) and Mobile (iOS, Android, Google) user interface (for applicant and Town staff).
- Enable online application submissions, revisions, and integrate with relevant Town workflows and other necessary features.
- Send automatic notifications to internal and external users, offer customizable application tracking functionality, and integrate with relevant Town workflows and necessary features.
- Assist with the application review and approval tasks, incorporating relevant Town workflows and necessary features.
- Provide real-time and customizable dashboarding and reporting features.
- Provide self-serve application portal type experiences to applicants, tailored to applicant type (realtor, homeowner, developer etc.).
- Be user-friendly and accessible to all users, considering accessibility such as [Web Content Accessibility Guidelines \(WCAG\) international standards](#).
- Flexible and scalable features to accommodate future features and additional modules.
- Provide real-time data integration with other Town systems or outside agency systems including but not limited to MAIS (financial management software), ArcGIS (geographic information system).

## 4.5 Implementation and Training Requirements

The Proponent should outline their proposed implementation and training approach for the software and meet the requirements of the Town outlined in [Appendix A – System Requirements Matrix](#).

- Clear upfront information regarding resourcing needs and all work (time and effort) required from Town staff.
- A schedule of project timelines, meetings, key milestones, status reporting and documentation along with a communications plan.
- Detailed progress reporting throughout the implementation.
- Detailed training plans (location, quantity, and format) for staff training time required during implementation tailored towards Town technical staff to be trained by the Provider to understand the software.
- Provide self-serve tools and resources for users (both internal and external) to access independently and on an as needed basis to learn how to use software.
- Outline detailed technical support for Town staff after implementation phase, including period of support provided, format in which support is accessed by staff.

## Part 5 Methodology and Work Plan

### 5.1 Implementation

The Town of Comox requires that the successful proponent take full responsibility for providing extensive project management and implementation services. The proponent is expected to guarantee the successful, timely completion of those aspects of the project over which it has control. The Town intends to take responsibility for meeting its obligation as defined in an agreed upon project implementation plan. Proposed methodology should cover the entire process, addressing the services provided for:

- Implementation;
- Installation;
- Training Requirements;
- System Testing; and
- Ongoing support for the successful completion of the project.

Proposals should describe the following in detail:

- Staff resources required (if any) for implementation including number of hours and level of involvement;
- Detailed implementation schedule and timeline;
- Any additional equipment/hardware the Town requires for a successful implementation (include additional costs);
- System integration opportunities and process;

- Project meetings and status updates; and
- Details of any customization work required to implement solution, including areas or modules where customization is required/recommended, the skill set and effort it takes to complete the customization, and the assistance (if any) needed by Town staff for the customization.
- Provide detailed Project Team outline including names, roles, responsibilities, and back up support.

## 5.2 Timelines and Scheduling

The Town of Comox expects that all deliverables required as part of this RFP will be complete by the proposed timeline as outlined in [Section 2.1](#). (above). The proposal should include a detailed implementation schedule which includes the following:

- Length of time for all important milestones of the project (ex. implementation, data integration, training, system testing etc) including details; and
- All key milestone dates and final date to take solution “live”.

## 5.3 Training and Ongoing Support

The Town of Comox expects that training plans will be developed for both operational (end users) and administrative (technical champions) staff. Training must be sufficient to allow Town staff to competently understand and operate the provided system. Technical training must be adequate for a few select staff members to make administrative changes and configurations if/when necessary. Proponents should outline their proposed training approach which should include the following:

- Location of training (online vs. in person);
- Hours required for each software module/component;
- Persona-based training options to ensure correct staff attend each session;
- Format of training documents; and
- Any alternative training approaches.

Proposals should include any warranty services that are included as part of the software, including what is covered, the term, and services provided. Proposals should discuss the organizations’ approach to software updates, how frequently updates are issued, ability to evolve with newer versions of underlying software, training provided to maintain software updates, Town staff responsibilities, etc. The proposal should also include information regarding:

- Support services offered;
- How support is provided (online, in-person, telephone etc.);
- Hours of support; and
- Maintenance services to help update software.
- Costs for warranty, maintenance and support should be broken out separately in proposal.

## Part 6 Mandatory Requirements

- **System Requirements Matrix (Appendix A)**
- **Submission Form (Appendix B)**
- **Pricing Tables (Appendix E)**
- **Experience & References (Appendix F)**
- **Privacy Impact Assessment (Appendix G)**

## Appendix A – System Requirements Matrix

See Appendix A

## Appendix B – Submission Form

See Appendix B

## Appendix C – Pre-Conditions of Award

The proponent will be required to supply:

A valid copy of a current WorkSafeBC (WCB) clearance letter with the contract and with each invoice submitted for payment. A current dated letter of exemption from WCB is required if you are not participating in the WCB program, notwithstanding acknowledgement that sole proprietors/independent contractors are not by their nature WCB participants.

A valid certificate of insurance with coverage not less than Two (2) Million dollars from an insurance company legally capable of carrying on business within the province of British Columbia and, names the Town as an additional insured with cross liability, and provides a minimum 30 days' notice of any changes to the policy.

Both WCB and Insurance documentation MUST indicate coverage for the type of work being requested in this competition and carried out in the resulting agreement.

## Appendix D- Evaluation Criteria

The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Score		Description
10	Excellent	High level of detail. Well-supported claims. Exceeds the requirement of the criteria significantly in a way that is beneficial to the Town's needs.
9	Very Good	Exceeds the requirement of the criteria in a way that is somewhat beneficial to the Town's needs. Well-supported claims.
8	Good	Meets or exceeds expectations of the requirement of the criteria in a way that is beneficial to the Town's needs. Adequate level of detail to support claims.
7	Average	Average level of Detail. Strongly fits or meets the requirement of the criteria but does not exceed any expectations.

6	Partially	Partially fills desired attributes. Meets the base line requirements of the criterion as requested. May be lacking in some areas which are not critical
5	Minimal	Partially meets expectations. Minimum acceptable level of criterion- Mostly complete response and detail but may be lacking in non-critical areas
4	Marginal	Mostly Complete. Lacks in critical areas- Addresses most but not all requirements of criterion. Poor level of detail in response. Unsupported claims.
3	Poor	Poor level of Detail. Requirements addressed but do not align with the Town's direction. Missing and/or mismatched attributes.
2	Very Poor	Missing or mismatched attributes. Minimally addresses some, but not all, of the requirements of the criteria; lacking in critical areas. Poor level of detail in response.
1	Very poor to unsatisfactory	Does not meet expectations. Minimally addresses requirements and lacks in critical areas. Incomplete response, poor level of detail, unsupported claims.
0	Unsatisfactory	Incomplete Response. Does not satisfy the requirements of the criteria in any manner.

#	Category	Weighting (%)
1	Corporate	20
2	Technical	40
3	Financial and Value Add	30
6	Demonstration	10
	Total Points	100

The criteria for evaluation of the Proposal may include, but is not limited to:

**Corporate**

- Proponent’s qualifications, experience, and demonstrated performance providing services of similar size, scope and complexity. Canadian-based companies will be given preference.
- Recent demonstrated successful municipal experience with implementation of a System of similar size, scope, and complexity. Only Canadian examples will be accepted, and preference will be given to examples within British Columbia.
- Qualified and experienced project Team and demonstrated back up support.
- Ability to conform to legislated requirements and Town policies and procedures such as the Freedom of Information and Protection of Privacy Act and Town record policies

**Technical**

- Deliver, set-up and execution
- Quality assurance, post-Implementation support, maintenance and upgrade plans
- Proven implementation methodology, plan and schedule, key deliverables and success factors
- Software functionality and suitability, and integration with existing Town systems
- Proven training strategy

- Ability to meet a majority of requested features

### **Financial**

- Total Price to include purchase cost, implementation costs, training costs, ongoing software support, maintenance and/or subscription costs for a specified time period

### **Demonstration**

- Shortlisted Proponents will be required to provide a demonstration of their System (standard script will be provided by Town)
- The demonstration will be evaluated, and the results will be included in the overall scoring

### **Qualifications and Past Experiences**

Each proponent should demonstrate successful delivery of outcomes providing, at minimum, the following in its proposal:

- a) A brief description of the proponent.
- b) Provide the professional qualifications, including resumes, of the team lead and members who will be supporting the project. Please also include project organization chart.
- c) Each proponent is requested to provide three (3) references from clients who have obtained goods and services similar to those requested in this competition from the proponent in the last five (5) years. References must follow the format outlined in Appendix F – Experience and References
- d) References other than those provided, including experiences the Town has had with the proponent, may be considered in the evaluation.

### **Value Add Services**

Proponents are asked to list services as a value add, which they feel would benefit the Town and the project. These are services at no additional cost to the project, which the Proponent feels makes their team unique and best suited to lead this work. Demonstrating commitment, understanding the Town's needs.

## Appendix E – Pricing

Prices shall be all-inclusive and stated in (Canadian Funds). Prices shall remain FIRM for the completion of the Services.

Prices shall include the provision of all tools, material, equipment, labour, transportation, fuel, supervision, management, overhead, material, traffic control, services, all necessary packaging and crating (where applicable), Canadian Customs import and export duties, freight, handling, transportation, insurance, all other associated or related charges, foreign, federal, provincial and municipal tax, bonding costs, all licenses, permits, inspections and all other requirements necessary for the commencement, performance and completion of Services as described.

Taxes are to be shown separately at the time of invoicing.

The lowest price of any Proposal will not necessarily be accepted but will be analyzed to determine best overall value.

All Proposals should include the following Pricing Forms.

Pricing entered in the tables below shall be on the following basis:

- a) All Prices are to in Canadian (CAD) and inclusive of all applicable duties and taxes, except GST and applicable PST, which shall be itemized separately where indicated. The prices are to be all-inclusive and include for all labour, material, supplies, site visits, travel, overheads, profit, insurance, expenses, disbursements, and all other costs and fees necessary to deliver the Deliverables
- b) The Fixed Cost prices are firm not-to-exceed prices. The Deliverables are to be completed for the price submitted. The Supplier will not be compensated above the Fixed Cost prices if they find that the work requires more effort than they had planned for when they prepared their Proposal

Implementation Period Milestone	Fixed Cost (CAD)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
<b>Subtotal</b>	
GST	
PST (if applicable per BC Ministry of Finance)	
<b>Total Implementation Period Milestone Costs</b>	

Provide an annual cost for the proposed System Support & Maintenance for the first five (5) years after the Implementation Period. For the purposes of evaluation, Proponents should provide estimated costs

based on ten (10) Town staff users requiring access to the System. The Town is under no obligation to guarantee the number of users for the System.

In addition to including this form, Proposals should identify how the support and maintenance contract will be structured in terms of pricing (ex. base feed, license fees per user, volume pricing, etc.).

Support & Maintenance Annual Costs	Fixed Cost (CAD)
Year One	
Year Two	
Year Three	
Year Four	
Year Five	
<b>Subtotal</b>	
GST	
PST (if applicable per BC Ministry of Finance)	
<b>Total Support &amp; Maintenance Costs</b>	

Provide the Total Cost (Total Implementation Period Milestone Cost plus Total Support & Maintenance Cost) below. Individual unit pricing (ex. milestone costs and annual costs) will prevail if there are any discrepancies between unit prices and Total Cost. The Town will use this Total Cost when evaluating Pricing.

Support & Maintenance Annual Costs	Fixed Cost (CAD)
Total Implementation Period Milestone Costs	
Total Support & Maintenance Costs	
<b>Total Costs</b>	

## Appendix F – Experience & References

Proponents should have completed the implementation of three (3) or more projects within the past five (5) years (as of the Closing Date and Time of this RFP) that included all the following:

- a) Canadian-based examples (preference given to those within British Columbia)
- b) Leading the implementation of a solution or software identified in Section 4.2 – Software Modules
- c) Provided for a client with at least ten thousand (10,000) or more potential users of the solution/software (ex. users who require full or partial access to its functionality)
- d) Migrating the client’s data into the solution/software
- e) Providing a test or development environment and a separate production environment
- f) Leading the development and maintenance of a public website from which users can access the functions they require
- g) Providing both major and minor upgrades to enhance functionality, fix bugs, and address the client or customers needs, and
- h) Providing; directly, three (3) or more years of support and maintenance following project implementation/go-live

Complete the following form for each project that demonstrates the Proponent organization’s experience described above. Proposals should include a minimum of three (3) and maximum of five (5) projects. If more than five (5) projects are provided, the Town will only consider the first five (5) when evaluating experience and references. Only include those projects for which implementation was completed within the past five (5) years (as of the Closing Date and Time of this RFP), as scores will be negatively impacted if the implementation was completed prior to this date.

Proponents should note that the Town may contact the client to provide a reference on the experience listed and may amend scoring in the evaluation based on the client’s feedback. Positive references will impact scoring positively, and poor or negative references will impact scoring negatively and may be grounds for rejection of a Proposal.

Additionally, the Town may consider information regarding the integrity and reliability of a Proponents services from parties other than those provided in a Proponent’s proposal, including the Towns own experience with the Proponent.

Project #1	
Client Name:	
Project Title:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
In the space below, describe in detail how the project met the criteria listed in this RFP. Be specific, as generic responses are unlikely to score well.	

--

Project #2	
Client Name:	
Project Title:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
In the space below, describe in detail how the project met the criteria listed in this RFP. Be specific, as generic responses are unlikely to score well.	

Project #3	
Client Name:	
Project Title:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
In the space below, describe in detail how the project met the criteria listed in this RFP. Be specific, as generic responses are unlikely to score well.	

--

Project #4 ( Optional)	
Client Name:	
Project Title:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
In the space below, describe in detail how the project met the criteria listed in this RFP. Be specific, as generic responses are unlikely to score well.	

Project #5 (Optional)	
Client Name:	
Project Title:	
Contact Name:	
Contact Phone Number:	
Contact Email:	
Dates Work Undertaken:	
In the space below, describe in detail how the project met the criteria listed in this RFP. Be specific, as generic responses are unlikely to score well.	

