



REQUEST FOR PROPOSAL (RFP)

RFP NUMBER: 19-2-2021-04-C

URBAN HOUSING MANAGEMENT

TERMS OF REFERENCE

December 17, 2021

Section 1.0 - REQUEST

- 1.1 The Town of Drayton Valley (as may be referred to hereinafter as the “Town”) is requesting a detailed and comprehensive proposal from qualified individuals, non-profit organizations and/or businesses for the management of 26 housing units owned by the Town of Drayton Valley, commencing March 1, 2022.
- 1.2 The Town is seeking proposals to meet the minimum requirements for service delivery as outlined in this Request for Proposals. **Proponents are invited to provide alternative options or solutions to address the service need.**
- 1.3 General information is available from the Community Services Manager, Town of Drayton Valley, 5102-52nd Street, Drayton Valley, AB. Phone 780 514 2200.
- 1.4 **Submissions will be accepted at the Town until 2:00 pm p.m. local time, January 28th, 2022.**
- 1.5 Responses can be mailed to the Town of Drayton Valley, Box 6837, Drayton Valley, AB, T7A 1A1 or hand delivered to the Town of Drayton Valley Civic Centre, 5102-52nd Street, Drayton Valley, AB. The submission must be in a sealed envelope and clearly marked as:

**Request for Proposal
Urban Housing Management
Town of Drayton Valley Housing Committee**

- 1.6 Submission inquiries are to be directed to:

Lola Strand
Community Services Manager
Town of Drayton Valley
Phone: 780 514 2200
Email Address: fcss@draytonvalley.ca

Section 2.0 - REQUIREMENTS

2.1 PURPOSE

The purpose of the RFP is to secure a management entity to assume all responsibilities in administering the rental program for the tenants and the maintenance and care of the properties as outlined in Appendix "A" attached.

2.2 LOCATION

The Town's housing units are in three locations, as identified in Appendix "B" attached.

2.3 AVAILABLE INFORMATION:

The Town can supply the following information and materials:

- a. Financial statements from 2017-2021
- b. Management Contract

2.4 MINIMUM PROPOSAL REQUIREMENTS

Each proposal must contain the following information:

- a. a description of the Proponent's services, including experience, licensing and certification, and financial viability;
- b. a detailed quotation, showing unit price for each division of service;
- c. proof of acceptable levels of liability and automobile insurance coverage;
- d. resumes of the individual(s) that will be assuming the responsibilities of administration, tenant relations, financial control, and facility maintenance;
- e. for private entities, proof of compliance with the licensing requirements under the Real Estate Act; and
- f. for non-profit organizations, proof of compliance under the Real Estate Exemption Regulation of the Real Estate Act.

Section 3.0 - SCOPE OF WORK

3.1 The following services will be required in the performance of this Agreement in order to achieve the Town's objectives. Modifications to this scope of work will be considered.

a. PRIMARY FUNCTION

Work with the Community Services Manager and in cooperation with municipal employees, including the Community Services department, with the goal to manage the urban housing program and to act as the Town's representative in the management and operation of the housing units.

b. MAJOR RESPONSIBILITIES

- i. Liaise with the Family and Community Support Services (FCSS) to receive information on eligible tenants.
- ii. Accommodate eligible tenants by establishing tenancy agreements and facilitating the tenant's move into the housing unit;
- iii. Manage all financial transactions, including receipt of rental fees, payment of management expenses, payment of maintenance expenses, refunding deposits, and payment of administration expenses.
- iv. Identify all necessary maintenance requirements and facilitate the completion of those maintenance needs;
- v. Prepare the annual operating budget and submit quarterly;
- vi. Coordinate an annual inspection of all housing units with the Town of Drayton Valley;
- vii. Manage all Legal proceedings regarding eviction notices and/or damage claims;
- viii. Make recommendations to the Town of Drayton Valley on capital improvements; and
- ix. Complete an audit of all financial records and arrange remittance of operating surplus to the Town of Drayton Valley.

c. DELIVERABLES

The Town of Drayton Valley has an expectation that the following deliverables will be achieved:

- i. The Contractor will report on a regular basis to the Town of Drayton Valley and maintain open communications to discuss all management and maintenance matters;
- ii. The Contractor shall provide professional personnel in the completion of all contractual work;

- iii. The Contractor shall act as an ambassador for the Town of Drayton Valley's Urban Housing program and advocate its merits; and
- iv. The Contractor shall apply best practices with respect to the management of the Urban Housing program with an objective of securing positive surpluses to enhance the program.

d. **TOWN OF DRAYTON VALLEY RESPONSIBILITIES**

The Town of Drayton Valley, through its Family and Community Support Services (FCSS) Department, shall be responsible for the following tasks and initiatives:

- i. Advertise vacancies in the housing units;
- ii. Administer the application process for potential tenants; and
- iii. Provide information to new tenants on their mandatory attendance in the Town of Drayton Valley's Making Financial Cents program (a series of free workshops providing information and education on a variety of personal financial responsibilities), and to administer this program.

Section 4.0 - GENERAL INFORMATION

4.1 BUDGET

Include a rate proposal, with a firm upset limit for each component of the service to be provided.

4.2 AGREEMENT REQUIREMENTS

- a. The successful Proponent will enter into a contractual agreement (in the form of a Services Agreement) with the Town within fifteen (15) days after delivery of the Agreement to the successful Proponent by the Town.
- b. If the successful Proponent fails to execute and return the Agreement to the Town within fifteen (15) days, the Town may cease all discussions and have no obligation to the Proponent, and may, if it chooses to do so, award the Agreement to another Proponent, all without affecting any claim which the Town may have against the Proponent as a result thereof.
- c. The Request for Proposals and the completed Proposal Form(s) including the Price Quotation and proposed Service Schedule of the successful Proponent will become Schedules of the Services Agreement.
- d. The Services Agreement will be for a negotiated term with the Town, and, at the Town's discretion, for an additional term.
- e. The Services Agreement will include, but may not be limited to, the following:
 - i. the start-up date identified by the Town in the proposal;
 - ii. the Proponent will be expected to perform the identified responsibilities, subject to the provision that the Town will have the ability to amend the operation of the service for the following purposes:
 - o to adjust to a change in the number of housing units; and/or
 - o to adjust to a change in the objectives of the program, as established by the Town of Drayton Valley.
- f. The Town will provide the successful Proponent with registration forms, brochures and other Town-generated documents.
- g. The successful Proponent must provide the Town with a certificate from Workers Compensation acknowledging Workers Compensation coverage for himself/herself and his/her employees and a copy of his/her liability insurance with respect to his/her vehicle(s), including but not limited to recreational vehicles on site and maintenance equipment used for the provision of the identified work.
- h. The successful Proponent is required to have a valid Town of Drayton Valley Business License prior to Agreement execution.

4.3 SUBMISSION OF PROPOSAL

- a. The Proponent shall submit four (4) copies of its Proposal with all accompanying schedules, appendices or addenda in a sealed envelope or package marked with the Proponent's name and the RFP title up to the Closing Time set out on the date and at the location shown on the title page of this RFP.
- b. Proposals received after the Closing Time or in locations other than the address indicated, will not be accepted and will be returned. The Town may elect to extend the Closing Time.
- c. Amendments to a Proposal may be submitted if delivered in writing prior to the Closing Time in a sealed envelope or package, marked with the Proponent's name and the RFP title.
- d. Proposals may be withdrawn by written notice only, provided such notice is received at the administration office of the Town prior to Closing Time.
- e. All costs associated with the preparation and submission of the Proposal, including any costs incurred by the Proponent after the Closing Time, will be borne solely by the Proponent.

4.4 CONFLICT OF INTEREST

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent, has any financial or personal relationship or affiliation with any elected official or employee of the Town or their immediate families which might in any way be seen by the municipalities to create a conflict.

4.5 EVALUATION OF PROPOSALS

- a. Proposals will be evaluated on the basis of the overall best value to the Town based on quality, service, price, and any other criteria set out herein including, but not limited to:
 - i. the Proponent's ability to meet the requirements, qualifications, and competencies set out herein;
 - ii. the Proponent's ability to deliver the services when and where required;
 - iii. financial offer;
 - iv. the Proponent's business and technical reputation and capabilities, experience and where applicable, the experience of its personnel, financial stability, track record, and references of current and former customers;
 - v. quality of Proposal; and
 - vi. any other criteria set out in the RFP or otherwise reasonably considered relevant.

- b. The Town may elect to short list some of the Proponents and may require short listed Proponents to provide additional information or details, including making a presentation, supplying samples, demonstrations, and/or additional technical literature.
- c. The Town may elect to enter into negotiations with the Proponent or with any other Proponents concurrently. In no event will the Town be required to offer any modified terms to any Proponent prior to entering into an Agreement, and the Town will not be liable to any Proponent as a result of such negotiations.
- d. All sub-contractors of the Proponent will be subject to the same evaluation process. It is the responsibility of the Proponent to guarantee that all its sub-contractors will comply with all the requirements and terms and conditions set out herein.

4.6 EVALUATION CRITERIA

- a. Proposals will be evaluated for their adherence to, interpretation of and response to the issues as set out in this document. The following established criteria will be used:
 - i. Proponent organization and strength;
 - ii. expertise and experience related to similar or related services;
 - iii. presentation of proposed methodologies and processes to achieve goals;
 - iv. clear identification of services included;
 - v. identification of major issues, challenges and risks associated with the deliverables;
 - vi. demonstrated budget breakdowns for time and effort for each deliverable;
 - vii. consultant's innovation in its approach to the service, including any recommended alternatives, efficiencies and originality;
 - viii. proposal conveys the Proponent's intent in a clear and concise manner; and
 - ix. co-ordination of work with the Town.

4.7 ACCEPTANCE AND REJECTION OF PROPOSALS

- a. Notwithstanding any other provision in the Proposal documents, the Town has in its sole discretion, the unfettered right to:
 - i. accept any Proposal;
 - ii. reject any Proposal;
 - iii. reject all Proposals;
 - iv. accept a Proposal which is not the lowest priced Proposal;
 - v. accept a Proposal that deviates from the Requirements, Specifications or the conditions specified in this RFP;
 - vi. reject a Proposal even if it is the only Proposal received by the Town;
 - vii. accept all or any part of a Proposal; and
 - viii. split the Services between one or more Proponents.
- b. All Proposals shall be irrevocable and remain open for acceptance for at least one hundred and twenty (120) days after the Closing Time, whether or not another Proposal has been accepted.
- c. The Town is not under any obligation to award a Contract and may elect to terminate this RFP at any time.

4.8 PROPOSAL TIMELINE

The Timeline for the RFP process is as follows:

- a. RFP opens – December 17th, 2021.
- b. RFP closes – 2:00p.m. January 28th, 2022.
- c. Presentations (if applicable) – from February 1st – 15th, 2022.
- d. Completion of evaluation process and award – February 15th; and
- e. Signing of Services Agreement – February 15th, 2022.

Section 5.0 - PROPOSAL FORM



**REQUEST FOR PROPOSAL SUBMISSION
URBAN HOUSING MANAGEMENT
PAGE 1 OF 2**

Proponent's Name: _____

Address _____

Mailing Address (if different from above) _____

Telephone: _____ Fax: _____

Key Contact Person: _____

Telephone (if different from above) _____

Email: _____

The undersigned Proponent, having carefully read and examined the RFP, including all sections, and having full knowledge of the requirements described herein, does offer to provide the goods and/or services in accordance with the requirements, terms and conditions set out in the RFP and in accordance with the pricing as described within.

Signature of Authorized Signatory

Date

Print Name and Title

REQUEST FOR PROPOSAL SUBMISSION

URBAN HOUSING MANAGEMENT

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REQUIRED PROPOSAL DOCUMENTS

By initialing each item, the Proponent confirms it has completed and enclosed the following documentation in its Proposal, and has identified any deviations or items of non-compliance providing an explanation of where it does not comply.

Initial

- | | | |
|-------|----|--|
| _____ | 1. | The Proponent's Alberta WCB registration number is _____. The Proponent warrants that it is in good standing as to all WCB assessments and requirements. |
| _____ | 2. | The Proponent confirms that it will comply with all occupational health and safety requirements, policies and procedures of the Town and all statutory occupational health and safety requirements under, or in connection with the <i>Worker's Compensation Act</i> . |
| _____ | 3. | Brief description of Proponent's company, purpose, and history of successes. |
| _____ | 4. | Information on size of organization, number of service providers, and staff employed. |
| _____ | 5. | Information on relevant experience performed during the last five (5) years. |
| _____ | 6. | Indication of the number and size of other municipalities where like services have or are currently being provided. |
| _____ | 7. | Identification of key personnel to be assigned to this Agreement, setting out their names, responsibilities, qualifications, and relevant experience. |
| _____ | 8. | Submission of a detailed budget breaking down the fees for all the services, identifying the total all-inclusive fee which shall include any out of the pocket expenses for the provision of services for the agreement/contract period. |
| _____ | 9. | Submission of a detailed list of any deviations and/or variations from the terms and conditions set out in this RFP and, if applicable, detail proposed amendments. |