



Request for Proposals BCFSA Strategic Communications Advisor

BC Financial Services Authority RFP Number: ON-0001946 Issue date: June 4, 2021

Closing Time: Proposals must be received before 2:00 PM Pacific Time on: July 5, 2021

DELIVERY OF PROPOSALS: Proposals must be in English and must be submitted using the submission method below, and must include a copy of this cover page that is signed by an authorized representative of the Proponent confirming the Proponent's intent to be bound.

BC Bid Electronic Submission: Proponents may submit an electronic proposal using BC Bid. Proposals must be submitted in accordance with the BC Bid requirements and e-bidding key requirements (found at www.bcbid.ca). Only pre-authorized electronic bidders registered on the BC Bid system can submit an electronic proposal using the BC Bid system.

Proposals must be received before Closing Time to be considered.

A proposal is deemed to incorporate the Confirmation of Proponent's Intent to Be Bound below, without alteration.

CONFIRMATION OF PROPONENT'S INTENT TO BE BOUND:

The enclosed proposal is submitted in response to the referenced Request for Proposals, including any Addenda. By submitting a proposal the Proponent agrees to all of the terms and conditions of the RFP including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposals;
- b) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the proposal; and
- c) The Proponent agrees to be bound by the statements and representations made in its proposal.

PROponent NAME (please print): _____

NAME OF AUTHORIZED REPRESENTATIVE (please print): _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

DATE: _____

GOVERNMENT CONTACT: Enquiries related to this RFP, including any requests for information or clarification may only be directed in writing to the following person who will respond if time permits before the Closing Time. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses providing new information will be recorded and posted to BC Bid or otherwise distributed to prospective Proponents.

Jimmy Kim
Manager, Procurement
2800 – 555 West Hastings, Vancouver BC, V6B 4N6

Jimmy.Kim@bcfsa.ca

The cut-off for submitting any questions related to this RFP to the Government Contact will be **48 hours** before the Closing Time. Questions received after this time may not be answered.

PROPONENTS' MEETING:

A Proponents' meeting **will not** be held.

ENVIRONMENTAL CONSIDERATIONS FOR PROPOSAL DELIVERY:

- The BCFSA requires only electronic submissions.

TABLE OF CONTENTS

1	SUMMARY OF THE OPPORTUNITY	1
2	RFP PROCESS RULES	2
3	SITUATION/OVERVIEW	8
	3.1 BCFSA Responsibility.....	8
	3.2 Background.....	9
	3.3 Scope.....	9
4	CONTRACT.....	9
	4.1 Contract Terms and Conditions	9
	4.2 Service Requirements	10
5	REQUIREMENTS.....	11
	5.1 Experience and Capabilities.....	11
	5.1.1 Company’s Relevant Experience & Capabilities	11
	5.1.2 PROJECT TEAM’S RELEVANT EXPERIENCE & CAPABILITIES	12
	5.2 Price	12
6	PROPOSAL STRUCTURE	13
	6.1.1 PROPOSAL REQUIREMENTS	13
	6.1.2 PROPOSAL FORMAT	14
	6.1.3 REFERENCES	14
7	EVALUATION	14
	7.1 Mandatory Criteria.....	15
	7.2 Weighted Criteria.....	15
	7.3 Price Evaluation.....	15
	Appendix A - Contract Form	17
	Appendix B: Relevant Experience & Capabilities Table.....	18

1 SUMMARY OF THE OPPORTUNITY

BC Financial Services Authority (“BCFSA”) is a Vancouver-based independent regulatory Crown Agency of the British Columbia Government that regulates the financial services industries in British Columbia, including credit unions, trust and insurance companies, pension plans, mortgage brokers, and the Credit Union Deposit Insurance Corporation. Its mandate is to protect the public against the insolvency of financial institutions, prevent improper market conduct in the financial services sectors, provide deposit insurance for members of B.C. credit unions and ensure the solvency of pension funds.

BCFSA is seeking Proposals from qualified Professionals / strategic communications supplier to provide strategic communication services, advice and support that include but not limited to the following areas;

- media relations,
- crisis and issues management;
- public affairs;
- communications strategy;
- stakeholder engagement;
- stakeholder relations;
- media training; and,
- government relations.

The successful Proponent will be a collaborative Partner with BCFSA’s Communications Department and must support their current work while also offering additional services to enhance BCFSA’s communication strategy and plans.

BCFSA anticipates the initial term of the Contract will be for three (3) years starting at contract signing with the possibility of two (2) one (1) year extensions. Contract extensions are at the discretion of BCFSA.

Further details as to the scope of this opportunity and the requirements can be found within this RFP.

2 RFP PROCESS RULES

2.1 Definitions

Throughout this Request for Proposals, the following definitions apply:

“Addenda” means all additional information regarding this RFP including amendments to the RFP;

“BC Bid” means the BC Bid website located at www.bcbid.ca;

“BCFSA” means the BC Financial Services Authority issuing this RFP;

“BCFSA Contact” means the individual named as the contact person for the BCFSA in the RFP;

“Closing Location” includes the location or email address for submissions indicated on the cover page of this RFP, or BC Bid, as applicable;

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by the Province and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with the Province;

“Government Contact” means the individual named as the contact person for the Province in the RFP;

“Government Electronic Mail System” or **“GEMS”** means the electronic mail system of the Province;

“must”, or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;

“OSRE” means the Office of the Superintendent of Real Estate;

“Proponent” means a person or entity (excluding its parent, subsidiaries or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP;

“proposal” means a written response to the RFP that is submitted by a Proponent;

“Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes the BCFSA;

“RECBC” means the Real Estate Council of BC;

“Request for Proposals” or **“RFP”** means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by the Province by Addenda;

“should”, “may” or **“weighted”** means a requirement having a significant degree of importance to the objectives of the Request for Proposals; and

“Tax Verification Letter” means a letter issued by the Province’s Ministry of Finance to verify that a Proponent meets its applicable B.C. corporate income tax filing obligations and provincial sales tax (PST) filing and payment obligations, which may be required to be produced by a Proponent as a condition of Contract finalization, as described in Section 2.29.

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent’s proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound. For proposals submitted via BC Bid attachment of the e-bidding key to an electronic proposal constitutes the signature of an authorized representative of the Proponent and is acceptable without additional signature.

2.3 Submission of Proposals

- a) Proposals must be submitted before Closing Time to the Closing Location using one of the submission methods set out on the cover page of this RFP. Proposals must not be sent by fax, except in the circumstances set out below. The Proponent is solely responsible for ensuring that, regardless of submission method selected, the Province receives a complete Proposal, including all attachments or enclosures, before the Closing Time.

- b) For electronic submissions (BC Bid or email), the following applies:
- (i) The Proponent is solely responsible for ensuring that the complete electronic Proposal, including all attachments, is received before Closing Time;
 - (ii) The maximum size of each attachment must be 20 MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent's internet service provider);
 - (iii) Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum size, the Proponent may make multiple submissions (BC Bid upload or multiple emails for the same opportunity) to reduce attachment file size to be within the maximum applicable size; Proponents should identify the order and number of emails making up the email proposal submission (e.g. "email 1 of 3, email 2 of 3...");
 - (iv) For email proposal submissions sent through multiple emails the Province reserves the right to seek clarification or reject the proposal if the Province is unable to determine what documents constitute the complete proposal;
 - (v) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. The Province may reject proposals that are compressed, cannot be opened or that contain viruses or malware or corrupted attachments.
- c) Only pre-authorized e-bidders registered on BC Bid can submit electronic bids on BC Bid. BC Bid is a subscription service (\$150 per year) and the registration process may take two business days to complete. If using this submission method, Proponents should refer to the BC Bid website or contact BC Bid Helpdesk at 250-387-7301 for more information. An electronic proposal submitted on BC Bid must be submitted using the e-bidding key of an authorized representative of the Proponent. Using the e-bidding key of a subcontractor is not acceptable.
- d) For email proposal submissions, including any notices of amendment or withdrawal referred to in Section 2.9, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.
- e) The Province strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before Closing Time.
 - f) The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the Proponent's computer and the Government Electronic Mail System or BC Bid.
 - g) While the Province may allow for email proposal submissions, the Proponent acknowledges that email transmissions are inherently unreliable. The Proponent is solely responsible for ensuring that its complete email proposal submission and all attachments have been received before Closing Time. If the Government Electronic Mail System rejects an email proposal submission for any reason, and the Proponent does not resubmit its proposal by the same or other permitted submission method before Closing Time, the Proponent will not be permitted to resubmit its proposal after Closing Time. The Proponent is strongly advised to contact the Government Contact immediately to arrange for an alternative submission method if:
 - (i) the Proponent's email proposal submission is rejected by the Government Electronic Mail System; or
 - (ii) the Proponent does not receive an automated response email from the Province confirming receipt of the email and all attachments within a half hour of the time the email proposal submission was sent by the Proponent.
- An alternate submission method may be made available, at the Province's discretion, commencing one half hour before the Closing Time, and it is the Proponent's sole responsibility for ensuring that a complete proposal (and all attachments) submitted using an approved alternate submission method is received by the Province before the Closing Time. The Province makes no guarantee that an alternative submission method will be available or that the method available will ensure that a Proponent's proposal is received before Closing Time.

2.4 Additional Information

All Addenda will be posted on BC Bid. It is the sole responsibility of the Proponent to check for Addenda on BC Bid. Proponents are strongly encouraged to subscribe to BC Bid's email notification service to receive notices of Addenda.

2.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated. In case of a dispute, the proposal receipt time as recorded by the Province at the Closing Location will prevail whether accurate or not.

2.6 Proposal Validity

Proposals will be open for acceptance for at least 120 days after the Closing Time.

2.7 Firm Pricing

Prices will be firm for the entire Contract period unless the RFP specifically states otherwise.

2.8 Completeness of Proposal

By submitting a proposal the Proponent warrants that, if the RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.9 Changes to Proposals

By submitting a clear and detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time. Unless the RFP otherwise provides, Proponents should use a consistent submission method for submitting proposals and any amendments or withdrawals. Upon Closing Time, all proposals become irrevocable. The Proponent will not change any part of its proposal after the Closing Time unless requested by the Province for purposes of clarification.

2.10 Conflict of Interest/No Lobbying

a) A Proponent may be disqualified if the Proponent's current or past corporate or other interests, or those of a proposed subcontractor, may, in the Province's opinion, give rise to an actual or potential conflict of interest in connection with the

services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

b) A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor or representative of the Province, including members of the evaluation committee and any elected officials of the Province, or with the media, may result in disqualification of the Proponent.

2.11 Subcontractors

a) Unless the RFP states otherwise, the Province will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. The Province will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed sub-contractors, if applicable.

b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.

c) A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, may, in the Province's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP,

participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

- d) Where applicable, the names of approved subcontractors listed in the proposal will be included in the Contract. No additional subcontractors will be added nor other changes made to this list in the Contract without the written consent of the Province.

2.12 Evaluation

- a) Proposals will be assessed in accordance with the evaluation criteria. The Province will be under no obligation to receive further information, whether written or oral, from any Proponent. The Province is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.
- c) The Province may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.

2.13 Contract

- a) By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the Province on substantially the same terms and conditions set out in Appendix A and such other terms and conditions to be finalized to the satisfaction of the Province, if applicable.
- b) Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.14 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to the Province within thirty days of notification of the successful Proponent, the Province may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

2.15 Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Proponents may request a debriefing meeting with the Province.

2.16 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with the Province, if any. The Province will not be liable to any Proponent for any claims, whether for costs, expenses, damages or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.17 Limitation of Damages

By submitting a proposal, the Proponent agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

2.18 Liability for Errors

While the Province has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.19 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP does not commit the Province in any way to award a Contract.

2.20 No Implied Approvals

Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

2.21 Legal Entities

The Province reserves the right in its sole discretion to:

- a) disqualify a proposal if the Province is not satisfied that the Proponent is clearly identified;
- b) prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to the Province that the Proponent has the power and capacity to enter into the Contract;
- c) not to enter into a Contract with a Proponent if the Proponent cannot satisfy the Province that it is the same legal entity that submitted the Proponent's proposal; and
- d) require security screenings for a Proponent who is a natural person, subcontractors and key personnel before entering into a Contract and decline to enter into a Contract with a Proponent or to approve a subcontractor or key personnel that fail to pass the security screenings to the Province's satisfaction.

2.22 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, the Province reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering into a Contract with a Proponent;
- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to waive any non-material irregularity, defect or deficiency in a proposal;

- d) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and consider such clarifications in evaluating the proposal;
- e) to reject any proposal due to unsatisfactory references or unsatisfactory past performance under contracts with the Province, or any material error, omission or misrepresentation in the proposal;
- f) at any time, to reject any or all proposals; and
- g) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

2.23 Ownership of Proposals

All proposals and other records submitted to the Province in relation to the RFP become the property of the Province and, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and the RFP, will be held in confidence. For more information on the application of the Act, go to http://www.cio.gov.bc.ca/cio/priv_leg/index.page.

2.24 Copyright

This document is subject to copyright and may be used, reproduced, modified and distributed to the extent necessary for the Proponent to prepare and submit a proposal.

2.25 Confidentiality Agreement

The Proponent acknowledges that prior to the Closing Time it may be required to enter into a confidentiality agreement with the Province in order to obtain access to confidential materials relevant to preparing a proposal.

2.26 Alternative Solutions

If more than one approach to deliver the services described in the RFP are offered, Proponents should submit the alternative approach in a separate proposal.

2.27 Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the

laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If the RFP requires Proponents to provide the Province with personal information of employees who have been included as resources in response to the RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents should specify that the personal information may be forwarded to the Province for the purposes of responding to the RFP and used by the Province for the purposes set out in the RFP. The Province may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the Province.

2.28 Trade Agreements

This RFP is covered by the following trade agreements:

- a) Trade, Investment and Labour Mobility Agreement;
- b) New West Partnership Trade Agreement;
- c) Canadian Free Trade Agreement;
- d) Canada-European Union Comprehensive Economic and Trade Agreement;
- e) World Trade Organization Agreement on Government Procurement; and

For more information, Proponents may contact the Government Contact.

3 SITUATION/OVERVIEW

3.1 BCFSA Responsibility

The Ministry of Finance plays a key role in managing government’s fiscal, financial and taxation policies. The Ministry also manages policy development and regulation for specific sectors including gaming, financial services, real estate and records management. Policy advice is also provided by the Ministry with respect to federal-provincial arrangements and the stewardship of the Canada Pension Plan. The Ministry has oversight for financial, procurement and administrative governance as well as banking, accounting, and risk and debt management services for the broader public service. The Minister of Finance is accountable for the B.C. Public Service Agency, Public Sector Employers’ Council, B.C. Securities Commission, B.C. Lottery Corporation, Partnerships B.C. and BCFSA.

BCFSA is a Vancouver-based Independent regulatory Crown Agency of the British Columbia Government. BCFSA’s four pillars of responsibility are pension plans, mortgage brokers, financial institutions (including credit unions, insurance and trust companies) and the Credit Union Deposit Insurance Corporation.

BCFSA takes a risk-based approach to financial services supervision fitted to the dynamic nature of the sectors that it oversees. BCFSA’s primary focus has remained consistent as BCFSA has evolved over the last 25 years - to safeguard the interests of depositors, policyholders, beneficiaries and pension plan members. The following diagram provides context for BCFSA’s regulatory role and environment.



BCFSA is comprised of three regulatory divisions, the Credit Union Deposit Insurance Corporation and a Corporate Services Division:

- **Financial Institutions Division (“FID”)** – This division is responsible for the risk-based supervision and regulation of BC credit unions, trust and insurance companies under the Financial Institutions Act, the Insurance Act, the Insurance (Captive Company) Act, and the Credit Union Incorporation Act and related Regulations.
- **Pensions Division** – This division is responsible for the regulation and risk assessment of BC pension plans under the Pensions Benefits Standards Act and Regulation.
- **Mortgage Broker Division** – This division is responsible for protecting the public and enhancing mortgage broker industry integrity by enforcing mortgage broker suitability requirements and reducing and preventing market misconduct under the Mortgage Brokers Act and Regulations.
- **CUDIC** - This statutory corporation guarantees all deposits and non-equity shares of British Columbia credit unions as set out in the Financial Institutions Act. CUDIC’s responsibility is to administer and operate a deposit insurance fund.
- **Corporate Services** – This division provides HR, Finance, Business Planning, Board Governance, Business Operations and IT services to the overall BCFSA organization.

3.2 Background

In November 2019, the Government of British Columbia announced the integration of BC Financial Services Authority (“BCFSA”), Office of the Superintendent of Real Estate (“OSRE”) and the Real Estate Council of BC (“RECBC”) into a single entity.

BCFSA is engaged in multiple projects resulting in increased demands for support and resources provided by the Communications Team. Additional support for the ongoing delivery of services particularly when it comes to strategic communications. BCFSA is seeking an external strategic communications company to provide strategic advice and support to the Communications Team as required and as further described in this RFP.

3.3 Scope

BCFSA is seeking a professional and experienced strategic communications and public relations company to provide a variety of communication services.

A Proponent must be able to provide team members with a variety of skills from simple copywriting to complex stakeholder engagement. In-depth knowledge and contacts within the B.C. Provincial Government is a must. Association with a large firm with offices across Canada would be an asset.

BCFSA expects the successful Proponent to have proven ability in identifying communications issues and opportunities and creating strategic approaches. An understanding of the financial services and real estate sectors is an asset.

4 CONTRACT

4.1 Contract Terms and Conditions

Proponents should review carefully the terms and conditions set out in Appendix A, including the Schedules.

4.2 Service Requirements

BCFSA is looking for strategic support services that include, but is not limited to the following:

- a) Demonstrating a deep understanding of regulated environments, public regulation, the B.C. government, crown agency communications, public affairs, and government relations.
- b) Providing ongoing strategic communications and Crisis Communications counsel, as required, to manage issues that develop or could develop, particularly those that could diminish public confidence in BCFSA or the Province's financial regulatory system.
- c) Preparing and executing communications plans, tools, and templates that BCFSA may require, including those related to the aforementioned Crisis Communications program, for both external and internal communications.
- d) Developing and participating in BCFSA crisis simulations and assessment of the performance of the Crisis Communications response.
- e) Providing contingency resources for media relations, social media monitoring or other related services as required during a Crisis.
- f) Providing media services, including strategy, design, media planning, and media buying in the digital and traditional space.
- g) Contributing to and enhancing, as required, BCFSA's outreach activities including the organization of news conferences, editorial boards or other events as required.
- h) Identifying new opportunities for outreach and education throughout the duration of the Agreement, including through speeches, presentations, and other stakeholder opportunities.
- i) Demonstrating knowledge and deep understanding of the complex regulatory issues at a local and national media landscape.
- j) Contributing expertise for and conducting, as required, media outreach including Canadian financial media.
- k) Providing comprehensive event management, including venue sourcing, audience experience, audio/visual, collaboration with partners and other items as needed (assumption that in-person events would take place at a future date when COVID-19 restrictions allow for such a gathering);
- l) Providing media relations expertise, including training of key executives and Board members and social media crisis training for staff as required.
- m) Demonstrating the ability to distil and translate complex, nuanced issues into understandable, impactful communication materials in a variety of media.
- n) Developing, designing, reviewing, and writing materials when required.

5 REQUIREMENTS

In order for a proposal to be considered, a Proponent must clearly demonstrate that they meet the mandatory requirements set out in Section 7.1 (Mandatory Criteria) of the RFP.

This section includes “Response Guidelines” which are intended to assist Proponents in the development of their proposals in respect of the weighted criteria set out in Section 7.2 of the RFP. The Response Guidelines are not intended to be comprehensive. Proponents should use their own judgement in determining what information to provide to demonstrate that the Proponent meets or exceeds the Province’s expectations.

Please address each of the following items in your proposal in the order presented. Proponents may find it helpful to use the individual Response Guidelines as headings for proposal responses.

5.1 Experience and Capabilities

The Proponent and any sub-contractors should be able to demonstrate, at minimum, the following experience, and capabilities. Areas of experience and capability in addition to the table below can be included for consideration by the evaluation team.

5.1.1 COMPANY’S RELEVANT EXPERIENCE & CAPABILITIES

ID	FIRM’S Relevant Experience and Capability
1.	Company information, including but not limited to the following: company profile and history; number and nature of the professional staff to be employed in this engagement on a full-time and part-time basis.
2.	Proponent’s understanding of the issues and scope of the project.
3.	Proponents should provide an overview of the Proponent’s general approach to providing strategic communications advice to public sector organizations. Must have a deep understanding, contacts and insights into B.C. provincial government.
4.	Ten (10+) plus years of recent experience working with the broader public sector and various levels of government, non-profit organizations, and similar agencies.
5.	Ten (10+) plus years of recent relevant experience developing comprehensive communications and marketing strategies;
6.	Ten (10+) plus years of recent relevant experience interacting professionally with a wide variety of people in diverse roles (e.g. executives, Board Members, Proponents, technical experts, users, etc.).
7.	Ten (10+) plus years of recent relevant experience providing sensitive and informed counsel on high profile issues, including at the Executive level.
8.	Ten (10+) plus years of recent relevant experience developing communication plans, tools and templates for a Crisis Communication program.
9.	Ten (10+) plus years of recent relevant experience developing outreach and education programs.
10.	Ten (10+) plus years of recent relevant experience providing media relations expertise, including training of key Executives and Board Members and social media crisis training for

	staff, as required.
11.	Ten (10+) plus years of recent relevant experience providing comprehensive events management expertise.
12.	Ten (10+) plus years of recent relevant experience developing, designing, reviewing and writing materials, as required. Provide samples of recent media releases.
13.	Provide two (2) examples of previous case studies demonstrating relevant experience distilling and translating complex, nuanced issues into understandable, impactful communication materials in a variety of media within the last ten (10+) plus years.
14.	Proponents with offices nationally and able to provide support for issues across Canada, if required, preferred but not mandatory.
15.	Provide two (2) examples of previous case studies of providing strategic communications for organizations within the last five (5) years that are comparable in size and complexity to BCFSA.

5.1.2 PROJECT TEAM’S RELEVANT EXPERIENCE & CAPABILITIES

The Proponent should propose a large team or at a minimum, the successful candidate must maintain the ability to provide five (5) full-time resources. All five (5) resources must be available within forty-eight (48) hours of receiving a request from BCFSA. The successful candidate must also maintain the ability to scale up to at least ten (10) resources within five days of receiving the request

The Proponent should provide a dedicated core team that has the proven ability to build meaningful relationships with its clients and has the skills and experience that can complement BCFSA’s Communications team.

Areas of experience and capability in addition to the list below can be included for consideration by the evaluation team.

ID	Relevant Experience Requirements of the Project Team
1.	Composition of the project team and the resumes of the key personnel indicating applicable work experience; professional credentials and qualifications; training; relevant continuing professional education for the past three (3) years; and, any membership in professional organizations relevant to this assignment for all team members
2.	The number of years each team member has been providing the listed services for similar size and type of organizations
3.	The areas of expertise of each team member, include examples of recent projects they’ve recently had a lead role with, and relate their certifications, qualifications, and experience to the requirements of this RFP.
4.	Proven experience working with financial regulators and the B.C. government with name of organizations and/or ministries; description of services provided and years of experience.

5.2 Price

Prices quoted will be deemed to be:

- a) in Canadian dollars ;
- b) inclusive of duty, FOB destination, and delivery charges where applicable; and

- c) exclusive of any applicable taxes.

Response Guidelines for Price

1. Provide Team rates, including names and job title using the table below for all anticipated team members included in this proposal. Add additional rows as required.
2. Include known expenses and any other regular costs associated in the delivery of services.

Team Member	Job Title	Anticipated % of Commitment per Engagement	Hourly Rate (\$/Hour)
Expenses and any other costs – provide details			

NOTE:

1. All Expenses and any other costs associated (i.e. out-of-pocket expenses, admin fees etc.) associated in the delivery of services must be included as part of the quote in the Proposal.
2. Proponents not submitting their budget in the specified format above will be deemed to be non-compliant and be disqualified.

6 PROPOSAL STRUCTURE

6.1.1 PROPOSAL REQUIREMENTS

1. Name a contact person for the Proponent, and include this person’s address, phone and fax numbers, and email address. This information will not be evaluated, but will be used to contact the Proponent as required;
2. Provide a **detailed summary** that clearly describes the number of years the organization has been providing the listed services for similar size and type of organizations and any other key information about your experience and capabilities;
3. Completed **Appendix B** giving details of the Proponent’s relevant experience and capabilities (based on 5.1.1 and 5.1.2).
4. Provide a **detailed resume of the Project Team** that includes:
 - a. Applicable recent work experience
 - b. Professional credentials and qualifications;
 - c. Other Training completed;
 - d. Relevant continuing professional education for the past three (3) years; and,
 - e. Membership in professional organizations relevant to this assignment.
5. The Proponent should provide team composition, including names and schedule of rates.
6. **References** (6.1.3)
7. **Pricing** (5.2)
8. Any other mandatory requirements outlined in section 7.1.

6.1.2 PROPOSAL FORMAT

Proponents should ensure that they fully respond to all requirements in the RFP in order to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- a) Signed cover page (see section 7.1 Mandatory Criteria).
- b) Table of contents including page numbers.
- c) A short (one or two page) summary of the key features of the proposal.
- d) The body of the proposal, including pricing, i.e. the “Proponent Response”.
- e) Appendices, appropriately tabbed and referenced.
- f) Identification of Proponent (legal name)
- g) Identification of Proponent contact (if different from the authorized representative) and contact information.

6.1.3 REFERENCES

Proponents must provide a minimum of three (3) references (i.e. names, reporting relationship to the Proponent on the project and contact information) of individuals who can verify the quality and effectiveness of work provided specific to the relevant experience of the Proponent. References from the Proponent’s own organization or from named subcontractors are not acceptable.

BCFSA may in its sole discretion, but is under no obligation to, check Proponent references without first notifying the Proponent or its subcontractors. BCFSA reserves the right to seek additional references independent of those supplied by the Proponent, including internal references in relation to the Proponent’s and any subcontractor’s performance under any past or current contracts with the Province or other verifications as are deemed necessary by it to verify the information contained in the proposal and to confirm the suitability of the Proponent.

Further to the Province’s reservation of rights under Section 2.22, if the Proponent is deemed unsuitable by the Province in its sole discretion due to unsatisfactory references, or if the proposal is found to contain material errors, omissions or misrepresentations, the Proponent’s proposal may be rejected.

7 EVALUATION

Evaluation of proposals will be by a committee formed by the BCFSA and may include employees and contractors of BCFSA and other appropriate participants.

BCFSA’s intent is to enter into a Contract with the Proponent who has met all mandatory criteria and minimum scores (if any) and who has the highest overall ranking.

Proposals will be assessed in accordance with the entire requirement of the RFP, including mandatory and weighted criteria.

7.1 Mandatory Criteria

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

Mandatory Criteria
The proposal must be received at the Closing Location before the Closing Time.
The proposal must be in English.
The proposal must be submitted using the submission method set out on the cover page of the RFP and in accordance with Section 2.3.
The proposal must include a copy of the cover page that is signed by an authorized representative of the Proponent confirming the Proponent’s intent to be bound.
The proposal must include a completed Appendix B (Experience & Capabilities Table)
The Proposal must include pricing as stated in Section 5.2

7.2 Weighted Criteria

Proposals meeting all of the mandatory criteria will be further assessed against the following weighted criteria.

Weighted Criteria	Weight	Minimum score
Company Experience and Capabilities (section 5.1.1)	50	35
Project Team Experience and Capabilities (section 5.1.2)	20	n/a
Price (section 5. 2)	30	n/a
TOTAL	100	

Proponents that do not meet a minimum score within a weighted criterion will not be evaluated further.

7.3 Price Evaluation

BCFSA will evaluate price as follows:

- BCFSA will calculate a total cost of a 40-hour engagement using the hourly rates and anticipated percentage of commitment from the table provided in Section 5.2 to calculate the total price such an engagement. Expenses will be included.

- The lowest price proposed will receive all the points allocated to price; and,
- All other proposals will be scored using the following formula:

$$\frac{\text{Lowest Priced Proposal X Points Available ("x" points)}}{\text{The Proposal's Price}}$$

Appendix A - Contract Form

By submitting a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with the Province on substantially the same terms and conditions of the following, and such other terms and conditions to be finalized to the satisfaction of the Province:

- General Services Agreement at <http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/templates-and-tools/service-contract-templates/general-service-agreement-information>

The following schedules will be included in the Contract:

- Schedule A (Services)
- Schedule B (Fees)
- Schedule C (Subcontractors, if applicable)
- Schedule D (Insurance)
- Schedule E (Privacy)
- Schedule F (Additional Terms)
- Schedule G (Security)

Appendix B: Relevant Experience & Capabilities Table

Please provide concise, relevant examples to support your response in the right-hand column, including cross references to the body of your proposal/resume.

Provide a reference (i.e. name and contact information) for each requirement of an individual who directly supervised the named resource and can verify the quality of work provided specific to the relevant experience requirement. References from the Proponent’s own organization or from named subcontractors are not acceptable.

COMPANY’S RELEVANT EXPERIENCE & CAPABILITIES

ID	Relevant Experience Requirements	Specific Examples in support of Proponent (cross referenced to resume)	Reference Details (name and contact information)
1.	Company information, including but not limited to the following: company profile and history; number and nature of the professional staff to be employed in this engagement on a full-time and part-time basis.		
2.	Proponent’s understanding of the issues and scope of the project.		
3.	Proponent’s general approach to providing strategic communications advice to public sector organizations. Must have a deep understanding, contacts and insights into B.C. provincial government.		
4.	Ten (10+) plus years of recent experience working with the broader public sector and various levels of government, non-profit organizations, and similar agencies.		
5.	Ten (10+) plus years of recent relevant experience developing		

ID	Relevant Experience Requirements	Specific Examples in support of Proponent (cross referenced to resume)	Reference Details (name and contact information)
	comprehensive communications and marketing strategies;		
6.	Ten (10+) plus years of recent relevant experience interacting professionally with a wide variety of people in diverse roles (e.g. executives, Board Members, Proponents, technical experts, users, etc.).		
7.	Ten (10+) plus years of recent relevant experience providing sensitive and informed counsel on high profile issues, including at the Executive level.		
8.	Ten (10+) plus years of recent relevant experience developing communication plans, tools and templates for a Crisis Communication program.		
9.	Ten (10+) plus years of recent relevant experience developing outreach and education programs.		
10.	Ten (10+) plus years of recent relevant experience providing media relations expertise, including training of key Executives and Board Members and social media crisis training for staff, as required.		
11.	Ten (10+) plus years of recent relevant experience providing comprehensive events management expertise.		

ID	Relevant Experience Requirements	Specific Examples in support of Proponent (cross referenced to resume)	Reference Details (name and contact information)
12.	Ten (10+) plus years of recent relevant experience developing, designing, reviewing and writing materials, as required. Provide samples of recent media releases.		
13.	Provide two (2) examples of previous case studies demonstrating relevant experience distilling and translating complex, nuanced issues into understandable, impactful communication materials in a variety of media within the last ten (10+) plus years.		
14.	Proponents with offices nationally and able to provide support for issues across Canada, if required, preferred but not mandatory.		
15.	Provide two (2) examples of previous case studies of providing strategic communications for organizations within the last five (5) years that are comparable in size and complexity to BCFSAs		

PROJECT TEAM'S RELEVANT EXPERIENCE & CAPABILITIES

ID	Relevant Experience Requirements	Specific Examples in support of Proponent (cross referenced to resume)	Reference Details (name and contact information)
1.	Composition of the project team and the resumes of the key personnel indicating applicable work experience; professional credentials and qualifications; training; relevant continuing professional education for the past three (3) years; and, any membership in professional organizations relevant to this assignment for all team members		
2.	The number of years each team member has been providing the listed services for similar size and type of organizations		
3.	The areas of expertise of each team member, include examples of recent projects they've recently had a lead role with, and relate their certifications, qualifications, and experience to the requirements of this RFP.		
4.	Proven experience working with financial regulators and the B.C. government with name of organizations and/or ministries; description of services provided and years of experience.		