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**FORMS**

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The Town of Okotoks has experienced significant population growth in recent years. Prior to 2012 the Town had capped population to around 30,000 persons due limited available water supply from the Sheep River. After 2012 Okotoks has replaced its fixed growth policy with a continuous growth policy and is pursuing the construction of a supplemental potable water pipeline from Calgary to support future growth. Okotoks is also currently in the process of annexing additional lands for approximately 82,000 persons by 2076.

Currently Okotoks treats its wastewater with a mechanical waste water treatment plant (WWTP) and discharges effluent into the Sheep River. Okotoks is planning significant infrastructure upgrades to support projected growth and would like to review the capacity and potential upgrade requirements of its current WWTP. The Town would also like to compare the feasibility of upgrading its WWTP to other options including a regional wastewater pipeline. As such the town is requesting proposals from engineering firms for a regional wastewater pipeline feasibility study.
SECTION 2

PROJECT SCOPE

As a minimum the final report will include the following elements and deliverables:

2.1. REGIONAL WASTEWATER PIPELINE FEASIBILITY STUDY

The Report must include the following minimum preparation steps and elements:

2.1.1. Collect and review all previous relevant studies and reports.
  o The following studies are electronically available at
    http://www.okotoks.ca/town-services/planning-development/engineering/infrastructure-studies-and-reports

  to firms to gain an understanding of the work completed to date and future work requirements:
    – Stantec January 2012
    – Stantec November 2012
  ▪ Town of Okotoks WWTP Zero Impact Assessment and Capacity Analysis – Stantec March 2012
  ▪ Okotoks Wastewater Treatment Plant Downstream Users Study
    – Stantec April 2009
  ▪ Town of Okotoks Growth Study and Financial Assessment
    – O2 Planning and Design February 2014

  o The following information will be provided post award
    ▪ WWTP Operations Data
    ▪ Existing License Data

2.1.2. A detailed review/modelling of the existing WWTP capacity
  o Hydraulic and treatment capacity for all major process equipment:
    ▪ Primary Treatment Equipment – Screw pumps, screens, vortex separator etc.
    ▪ Secondary Treatment Equipment – Primary Clarifier, Bioreactors, Secondary Clarifier, transfer/recirc pumps etc.
    ▪ Tertiary Treatment
  o The treatment capacity of the existing plant should be determined as a minimum for each of the following parameters:
2.1.3. WWTP upgrade requirements for a 25 and 50 year design horizon based on current license requirements.

2.1.4. Identify sanitary servicing options for the 25 and 50 year design horizons, based on current standards. The regional system will need to demonstrate acceptable design life, per capita flows, industrial flow estimates, and peaking factors (note: peaking factors for Okotoks can be found in the Flow Monitoring Program reports. Some of this information will become available with the concurrent Sanitary Master Plan Update Study). As a minimum the following options should be compared:

- Pipeline to the City of Calgary Pine Creek WWTP.
- Regional treatment option. To build a new WWTP in the region to treat raw wastewater from the town of Okotoks and other municipalities. This option is excluded from the project scope for the time being.

For the above option both a stand-alone and supplementary scenario should be considered.

- Local WWTP upgrade to increase capacity with a discharge into the sheep river.
- Local WWTP upgrade to increase capacity with a supplemental treated effluent pipeline to the Highwood River or Bow River. The additional effluent pipeline may be required if the regulatory capacity of the Sheep River is exceeded.

2.1.5. Explore whether headwork upgrades, pre-treatment or equalization would be required for a raw wastewater pipeline option.
2.1.6. Complete a 25 and 50 net-present-value (NPV) total-cost-of-ownership (TCO) analysis for the above options including capital, operating, City of Calgary bulk sewage charges etc. No consideration shall be given for any provincial and/or federal grants in the analysis/comparisons.

2.1.7. A high level estimate of probable effluent river quality based parameter loading quality limits and their cost implications to the 25 and 50 year WWTP upgrade requirements.

- Okotoks’ current WWTP AENV license is due for renewal. AENV has indicated that our future WWTP license requirements will likely be based on parameter loading. Currently an in stream river water quality program is underway to determine upstream and downstream river quality relative to our WWTP’s effluent and to rationalize future effluent limits. This work will not be complete prior to the required delivery of this feasibility study and as such a high level estimate (based on other major WWTP’s in the basin) of quality limits that may be placed onto the Okotoks WWTP under current standards is also requested. What would the WWTP upgrade requirements and potential cost implications for a 25 and 50 year design horizons be for these estimated effluent requirements?

2.1.8. Identify project risks and complexities including:

- Environmental and regulatory issues (water licenses, regulations, effluent standards, water conservation strategy, inter-tributary diversions, river quality implications etc.)

- Public health and perception issues which are associated with each alternative.

- Available area / footprint for WWTP expansion at the existing location.

The report should comment on how these risks affect the feasibility of the proposed options.

2.1.9. Okotoks has some major infrastructure upgrades planned in the next 10 years including the twinning of 32nd Street, a Calgary treated potable water pipeline, potentially upgrading portions of the collection system and installing a force main/river siphon to service potential South Annexed Lands. There may be some potential major cost savings in coordinating construction efforts or phasing the projects to align with other planned upgrades.

The report should comment on any impacts these upgrades may have on the NPV and or project phasing.
2.1.10. Provide recommendations for project implementation, including timing of required upgrades and phased construction.

2.2. MEETINGS, SITE VISITS AND PRESENTATIONS:

- Initial project initialization meeting @ Okotoks (approx. 2 hours)
- Okotoks WWTP Site Inspection, Review and Visit(s)
- Potential Meeting with the City of Calgary WWTP group to gain understanding on the Pine Creek WWTP capacity and upgrade requirements.
- Draft Report Review Meeting @ Okotoks (approx. 2 hours)
  - The consultant will review the draft report with the town and incorporate any Town feedback.
- Council Presentation @ Okotoks (approx. 1-2 hours)
  - The consultant will prepare a short power-point report summary presentation to council (10 mins) and answer and questions

ENTRY INTO AN AGREEMENT/CONTRACT

The successful consultant will be required to enter into a standard Engineering Agreement between Client and Engineer.
SECTION 3

PROPOSAL GUIDELINES

Proposals will be accepted until 2:00 pm local time March 4th, 2015. Any proposals received after this time will be rejected.

Proposal submissions are to be marked and directed to:

Regional Wastewater Feasibility Study – RFP
Attn: Jeremy Huet
Town of Okotoks Municipal Center
5 Elizabeth Street
Okotoks Alberta
T1S1K1

Inquiries and questions are to be directed to:

Jeremy Huet P.Eng
Ph: 403-938-8910
jhuet@okotoks.ca

As the cost is not the predominant factor in evaluating this proposal the tender opening will NOT be public.

The tender is only open to consultants with offices in NWPTA member provinces (British Columbia, Alberta and Saskatchewan) and those who have an APEGA permit to practice.

If additional information is required during the evaluation process, the Consultant shall provide such information within 5 business days of the request.
GUIDELINE

Evaluation of proposals is made easier when consultants respond in a similar manner. We request the following format be followed to provide consistency in each response:

TITLE PAGE
Show RFP number and title, consultants name and address, closing date and time, consultant’s telephone number, and contact person.

LETTER OF INTRODUCTION
The consultant must provide a brief company profile

- Description of the firm, including size, range of services and activities, etc.
- Address and location(s) of the office from which any work will be performed
- Any relevant information that would positively portray the Engineering Consulting Firm and their team members

TABLE OF CONTENTS
Include Page Numbers.

PROJECT OVERVIEW AND METHODOLOGY
A short summary (one page max) of the key features of the proposal.

- Outline activities the consultant plans to take in order to see the project through a successful conclusion.
- Identify any unique elements of the proposal, methodology or additional consulting scope offered.

PROJECT TEAM
The Consultant must provide the names of key technical and engineering staff to be involved in the project including their position descriptions, experience, technical background and qualifications. Providing resumes for key members is recommended. No change in key staff or allocated work will occur without written permission by the Town of Okotoks. List any and all sub-contractors / consultants that will be utilized during the project.

As part of the evaluation we are looking for teams that include the following:

- A senior engineer with specialization in conventional WWTP process, biology and/or mechanical.
- An intermediate or senior engineer with water/wastewater pipeline and lift station experience.
- An identified team lead as well as the person who will be doing the majority of the feasibility analysis.

**SCHEDULE OF COSTS AND WORK SCHEDULE**

This shall identify the phases of work, technical and engineering personnel who will undertake the work, hourly rates, and estimated hours of work by each member on each project phase. A spreadsheet breakdown of hours per member, per area of report contribution must be included as a large portion of the proposal evaluation is based on team composition and contributions. Multiple team members may be included per item.

- Omission in identifying an incidental item (or incorporating it into rates) will be deemed as providing the service at a nil charge. Disbursements must be listed and a separate cost shown.
- Pricing for this project will be **Fixed Fee** and should include all disbursements.

**INVOICING**

Invoicing will be accepted on a monthly basis only, and shall utilize the **10th** of each month as an invoice cutoff date. If this date falls on a weekend, please use the ensuing Monday as a deadline.

Invoices must be supplemented with a brief Expenditure Report showing per phase costs this period, and costs to date. The Expenditure report must include the costs represented by the current invoice and must be attached to the invoice for easy reference.

The Consultant Fixed Cost Items will be an absolute maximum invoiceable dollar value allowed under this contract unless exceptional conditions are encountered or instructions to the contrary are issued by the Town. Neither estimating errors nor internal production assumptions will be considered as exceptional conditions. Any changes that may affect the Total Cost of Engineering fees must be identified and approved in writing by the Town. The Engineering or project Contingencies cannot be utilized without prior written justification and subsequent written approval from the Town.
WORK SCHEDULE

A proposed schedule for the project is defined below. The consultant shall highlight any proposed changes or confirm that they can meet the proposed schedule in their report. The consultant should allow for a minimum of one week for the Town’s review of any material prior to a meeting date.

<table>
<thead>
<tr>
<th>Milestone Events</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFP Deadline</td>
<td>Mar 4, 2015</td>
</tr>
<tr>
<td>Project Initialization Meeting</td>
<td>Mar 18, 2015</td>
</tr>
<tr>
<td>Partial Results Presentation</td>
<td>June 3, 2015</td>
</tr>
<tr>
<td>Council Presentation</td>
<td>Sep 14, 2015</td>
</tr>
</tbody>
</table>

PREVIOUS EXPERIENCE AND REFERENCES

- A list and description of similar projects satisfactorily performed within the last 5 years (please include WWTP plant upgrades or similar projects).
- Provide a list of 3 Municipal references for projects of a similar nature, size and complexity to the service requirements of this proposal. References will be contacted at the discretion of the Town of Okotoks. The Town reserves the right to investigate other than listed references.
- The town may use previous performance on other town projects as part of the proposal evaluation.

APPENDICES

- One or two feasibility studies or similar reports. Part of the review will also look at whether this report was prepared by proposed key team members.
- Any additional information, brochures, standard forms, etc.
SECTION 4

PROPOSAL EVALUATION CRITERIA

The following criteria outlines the importance that will be considered in the project award. Proposal submissions should satisfy all criteria points wherever possible.

Consulting Firms will be evaluated on the following weighted evaluation factors:

- QUALITY OF SUBMITTED REPORTS 20
- PROJECT TEAM 25
- PROJECT CONTROL / SCHEDULE / ORGANIZATION 5
- INNOVATION** 5
- PREVIOUS EXPERIENCE AND REFERENCES 15
- COST 30

**Innovation - Provide any alternative or innovative ideas that could apply to or improve the design of the project.
RFP SUBMISSION CHECKLIST

This checklist has been provided for your convenience. Please ensure the following points have been addressed.

☐ Submit Checksheet
☐ Complete all of Section 3 Proposal requirements
  ☐ Title Page
  ☐ Letter of Introduction
  ☐ Table of Contents
  ☐ Project Overview and Methodology
  ☐ Project Team
  ☐ Schedule of Costs
  ☐ Work Schedule
  ☐ Previous Experience and References
  ☐ Appendices
    ☐ One or two feasibility studies or similar reports (only one hard copy and one electronic copy [on a CD/DVD or USB stick] are required for these studies/reports)
  ☐ Provide an APPEGA Permit to Practice Number or a photocopy of the Permit.
  ☐ Provide proof of professional liability (O&M) insurance.
  ☐ Include addendum receipt acknowledgement form.
  ☐ Review all deadline expectations.
  ☐ Four complete hard copies of each proposal are to be submitted (excepting the studies noted above).
  ☐ The undersigned has the signing authority to submit a bid/proposal on behalf of the consulting firm.

Signature ___________________________ Date ___________________________
**ADDENDUM RECEIPT ACKNOWLEDGEMENT FORM**

This form must be signed and dated in the spaces provided and submitted with your Proposal. All proposers must submit this form with its Proposal regardless of the contact contained in each Addendum. This will acknowledge receipt of the following addenda and, that the pricing quoted includes the provision set out in such addenda.

<table>
<thead>
<tr>
<th>CONSULTANT NAME</th>
<th>ADDRESS</th>
<th>PHONE NO.</th>
<th>CONTACT NAME</th>
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<tr>
<th>ADDENDUM #</th>
<th>SIGNATURE</th>
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### CONSULTANT PERFORMANCE EVALUATION GUIDELINES

The table outlines some standard consultant evaluation metrics that may be used to award or evaluate the consultants' project performance.

<table>
<thead>
<tr>
<th>INNOVATION</th>
<th>DELIVERABLES</th>
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<tbody>
<tr>
<td>- Explore and Evaluate all feasible alternatives</td>
<td>- Provide accurate and complete designs, tender packages, final detailed, and reports</td>
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<tr>
<td>- Consider all key factors as well as life cycle cost</td>
<td>- Deliverables completed/submitted within the project schedule provided by the Town</td>
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<tr>
<td>- Recommend/Select the most cost-effective Solutions</td>
<td>- Comply with Milestone dates, within acceptable limits</td>
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<td>- Alternative analysis provided</td>
<td>- Produce quality product that meets the project triple constraints (Time-Cost-Scope)</td>
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<td>- Implement innovative or new methodology for project improvements</td>
<td>- Provide well documented findings</td>
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<tr>
<th>CONSTRUCTION SUPERVISION &amp; CONTRACT ADMINISTRATION</th>
<th>PROJECT MANAGEMENT</th>
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<tbody>
<tr>
<td>- Deal responsively with Traffic Accommodation, Eco plan, and site safety issues</td>
<td>- Demonstrate good expenditure control</td>
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<tr>
<td>- Resolve contract specification interpretation as well as resolving site specific problems in a timely matter</td>
<td>- Meet project scope (Deliver project on time and on budget)</td>
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<tr>
<td>- Interact well (appropriately) with all stakeholders</td>
<td>- Manage expenditure reporting and scope change appropriately</td>
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<tr>
<td>- Maintain appropriate line of communication</td>
<td>- Provide accurate and clear forecasts, reports, and invoices (making sure to avoid excessive errors)</td>
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<tr>
<td>- Inform the public in advance for any lanes closure</td>
<td>- Communicate with project sponsor for major projects issues for quick resolution</td>
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<tr>
<td>- Deliver timely, accurate and acceptable progress payment</td>
<td>- Assign staff who performed as per the qualification stated as well as following government’s regulations</td>
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<tr>
<td>- Obtain necessary detailed scope change from contractors and making sure to verify the accuracy of unit prices</td>
<td>- Provide appropriate corporate contact for each project</td>
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<tr>
<td>- Ensure safety, operation, and environment plans (Dust control, water run on/off)are followed by contractors</td>
<td>- Assign resources to ensure optimum project delivery</td>
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<tr>
<td>- Document all sites issues, public involvement and deal with them appropriately</td>
<td>- Communicate effectively with all team members directly involved in managing the project</td>
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<th>STAFF PERFORMANCE</th>
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<tr>
<td>- Provide very competent staff based on competence, expertise, experience, and people management skills</td>
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<tr>
<td>- Demonstrate corporate responsibility for actions taken and outcomes</td>
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<tr>
<td>- Provide staff as specified in the proposal or where approved by project sponsor, equivalent substitutes</td>
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<tr>
<td>- Designate appropriate involvement and time allocation of key personnel as specified in the proposal</td>
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