

Part D: Submission Forms



This Part D contains forms detailing the information that should be submitted with the Proposal, as detailed in Part B.

Part D Contents:

This Part D contains the following forms:

- Appendix A – Pricing Form
- Appendix B – Proposed Equipment Details Form
- Appendix C – Schedule / Lead Times Form
- Appendix D – Warranty Details Form
- Appendix E – Exceptions to Contract Form

APPENDIX A – PRICING FORM



Proposals must include this Appendix A – Pricing Form, with all pricing tables with blue header-rows completed. No changes to this form shall be made, except for completing the requested pricing and information in the spaces provided.

The form should be completed, and the completed form must be uploaded with the Proposal as prompted by the 'Document Upload' instructions in the *Bids & Tenders* System.

Evaluation Factors:

The pricing submitted under this form will be evaluated using the Scoring Method detailed in Part B of this RFP.

1. Equipment & Services Lump Sum Price:

- a) For supply of the Equipment and ancillary Services, as detailed in Part A, the Town shall pay the Supplier the Total Lump Sum Equipment Price, as detailed below.
- b) All amounts are in Canadian Dollars, and are inclusive of all applicable duties and taxes, except for the GST which shall be itemized separately where indicated.
- c) The Total Lump Sum Equipment Price shall be all-inclusive and fixed for the Contract Term, and shall include for any changes in; inflation, material or component costs, currency exchange rates, or other variable costs over the Contract Term.

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Supply of Motor Control Center (MCC)

ITEM	EQUIPMENT/SERVICES ITEM DESCRIPTION (MID LINE PUMP STATION)	LUMP SUM PRICE
1	Motor Control Center for Mid Line Pump Station, including 2-year warranty and spare parts for the Equipment (as per Specifications/requirements in Part A & Supplier's Proposal)	\$
2	Shop Drawings, O&M Manuals, Instructions for storage, instructions for installation, and Other Submittals for the Equipment (as per the Specifications). Include allowance for modification of shop drawings to reflect 'As-built' conditions following installation and commissioning.	\$
3	Delivery of all Equipment to the Midline Pump Station Site (LSD 14 NW ¼ SEC 21-21-28-4 W4M). Includes loading, transportation, and unloading of the Equipment on site. Coordination with the Contractor of the midline pump station for delivery and unloading.	\$
4	Certification of Equipment Installation, Operation & Maintenance Training and Equipment Performance Testing as defined by the Specifications (Field Start-up/Testing and Commissioning) (Assume 2 Trips of 2 Days each). Price includes labour & overheads, travel to/from site, all expenses & disbursements.	\$
5	End of Warranty Inspection (Assume 1 Trip of 1 Day). Price includes labour & overheads, travel to/from site, all expenses & disbursements.	\$
6	Any Other Costs for Equipment Items / Services to make Equipment fully effective and operational (specify if any):	\$
TOTAL LUMP SUM EQUIPMENT PRICE (Mid Line Pump Station), EXCLUDING GST: (SUM OF ITEMS 1 TO 6)		\$
ITEM	EQUIPMENT/SERVICES ITEM DESCRIPTION (INTAKE PUMP STATION)	LUMP SUM PRICE
7	Motor Control Center for Intake Pump Station, including 2-year warranty and spare parts for the Equipment (as per Specifications/requirements in Part A & Supplier's Proposal)	\$
8	Shop Drawings, O&M Manuals, Instructions for storage, instructions for installation, and Other Submittals for the Equipment (as per the Specifications). Include allowance for modification of shop drawings to reflect 'As-built' conditions following installation and commissioning.	\$

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9	Delivery of all Equipment to the Intake Pump Station Site (LSD 14 NW ¼ SEC 26-21-28-4 W4M). Includes loading, transportation, and unloading of the Equipment on site. Coordination with the Contractor of the midline pump station for delivery and unloading.	\$
10	Certification of Equipment Installation, Operation & Maintenance Training and Equipment Performance Testing as defined by the Specifications (Field Start-up/Testing and Commissioning) (Assume 2 Trips of 2 Days each). Price includes labour & overheads, travel to/from site, all expenses & disbursements.	\$
11	End of Warranty Inspection (Assume 1 Trip of 1 Day). Price includes labour & overheads, travel to/from site, all expenses & disbursements.	\$
12	Any Other Costs for Equipment Items / Services to make Equipment fully effective and operational (specify if any):	\$
TOTAL LUMP SUM EQUIPMENT PRICE (Intake Pump Station) EXCLUDING GST: (SUM OF ITEMS 7 TO 12)		\$
TOTAL LUMP SUM EQUIPMENT PRICE EXCLUDING GST: (SUM OF ITEMS 1 TO 12)		\$

2. Optional Prices:

The following optional Equipment features or Support Services may be executed at the time of the Contract, or throughout the Contract term, at the Lump Sum Price adjustments listed below:

	OPTIONAL EQUIPMENT FEATURES OR SUPPORT SERVICES ITEM:	ADJUSTMENT TO 'TOTAL LUMP SUM EQUIPMENT PRICE' SHOWN IN SECTION 1. ALL PRICES EXCLUDE GST.
1	Extra Site Attendance (1 Trip of 1 Day). Price includes labour & overheads, travel to/from site, all expenses & disbursements.	ADD: \$
2	Other Additional Items or Services (Specify details of any offered in Appendix B, Optional Items)	ADD: \$
3	Per-month charge for storage of the Equipment at the Supplier's facility if the pump site is not for the equipment delivery. (Mid Line Pump Station MCC)	ADD: \$
4	Additional charge to deliver the Equipment to the Town of Okotoks Operations Yard, should the Midline Pump Station Site not be ready to receive the Equipment. (Mid Line Pump Station MCC)	ADD: \$
5	Per-month charge for storage of the Equipment at the Supplier's facility if the pump site is not for the equipment delivery. (Intake Pump Station MCC)	ADD: \$
6	Additional charge to deliver the Equipment to the Town of Okotoks Operations Yard, should the Midline Pump Station Site not be ready to receive the Equipment. (Intake Pump Station MCC)	ADD: \$

3. Equipment Price Payment Schedule:

In accordance with Section 18 of the Contract (Part C of this RFP), the Supplier may deliver invoices to the Town for payment of the Total Lump Sum Equipment Price specified in Section 1 in accordance with the following payment milestones:

Mid Line Pump Station MCC:

- 30% of Total Lump Sum Equipment Price for Mid Line Pump Station MCC following Town's approval of Supplier's Shop Drawings
- 50% of Total Lump Sum Equipment Price for Mid Line Pump Station MCC following completion of Delivery of the equipment at the site of the FORW Midline Pump.
- 20% of Total Lump Sum Equipment Price for Mid Line Pump Station MCC following satisfactory completion of Equipment field Commissioning and Performance Testing in

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accordance with the Specifications, in the Town's sole opinion.

Intake Pump Station MCC:

- 30% of Total Lump Sum Equipment Price for Intake Pump Station MCC following Town's approval of Supplier's Shop Drawings
- 50% of Total Lump Sum Equipment Price for Intake Pump Station MCC following completion of Delivery of the equipment at the site of the FORW Midline Pump.
- 20% of Total Lump Sum Equipment Price for Intake Pump Station MCC following satisfactory completion of Equipment field Commissioning and Performance Testing in accordance with the Specifications, in the Town's sole opinion.

APPENDIX B – PROPOSED EQUIPMENT DETAILS FORM



Proposals must include this Appendix B – Proposed Equipment Details Form, with all tables with blue header-rows completed. No changes to this form shall be made, except for completing the requested information in the spaces provided. Supporting Documents requested should be attached to the Appendix B submission and clearly marked as “Appendix B – Proposed Equipment Details Form: Supporting Documents”.

This form should be completed with; a PDF writer program; or by print, hand completion and scan. The completed form, plus supporting documents, must be uploaded with the Proposal as prompted by the ‘Document Upload’ instructions in the *Bids & Tenders* System.

Scoring Method:

- Pursuant to Part B of the RFP, the evaluation committee will determine during the ‘Mandatory Criteria’ phase whether the Form is a ‘Pass’ or ‘Fail’ according to the following criteria:

Score	Criteria
PASS	a) The Proposal includes all the details and documents requested in sections 1 – 3. b) Compliance with the design requirements outlined in the Equipment Specifications. Where deviations from the Equipment Specifications exist, the Engineer will evaluate to confirm whether the necessary performance criteria of the Equipment are met.
FAIL	The Proposal does not meet the ‘Pass’ criteria stated above.

1. Specification Compliance:

Please check **either** statement A **or** statement B below:

Specification Compliance Statement:

STATEMENT A:

☐

We have read the Equipment Specifications and requirements detailed in Part A, including Specifications:

- 26 05 00 – Basic Electrical Requirements
- 26 24 19 – Motor Control Centers
- 26 29 23 – Variable Frequency Drives
- 26 36 23 – Automatic Transfer Switch

and confirm that the Equipment proposed meets all Specification requirements.

STATEMENT B:

☐

We have read the Equipment Specifications and requirements detailed in Part A, including Specifications:

- 26 05 00 – Basic Electrical Requirements
- 26 24 19 – Motor Control Centers
- 26 29 23 – Variable Frequency Drives
- 26 36 23 – Automatic Transfer Switch

and confirm that the Equipment proposed meets all Specification requirements, except for the variances detailed below: (please specify, attach further sheet if required.)

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2. Supporting Documents:

If the following information is not included in the base proposal, please attach to your Appendix B submission as "Supporting Documents":

- a) **General Terms and Conditions**
- b) **General MCC Information**
- c) **Layout c/w Description of each section**
- d) **Site Testing and Training Available**

3. Operating Costs, Maintenance and Service Requirements:

- a) **Operating Cost Information:** Please complete the following table for the Motor Control Center Equipment proposed:

#	OPERATING COST ITEM – Mid Line Pump Station MCC
1	
2	
3	
4	
5	
6	
7	
8	

#	OPERATING COST ITEM – Intake Pump Station MCC
1	
2	
3	
4	
5	
6	
7	
8	

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b) **Major Component Manufacturers:**

Provide the following details in a consolidated format in the box below:

Provide details on major component manufacturers and systems assembly locations for the Equipment.

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c) **O&M Task Details:**

Provide the following details in a consolidated format in the boxes below:

List operations and maintenance (O&M) tasks, frequency, manpower, material and equipment required to service the Motor Control Center Equipment components:

d) **Maintenance Shutdowns:**

Provide the following details in a consolidated format in the box below:

List frequency, purpose, and duration of major required maintenance shutdowns:

e) **Owner's Plant Operator O&M Activities:**

Provide the following details in a consolidated format in the box below:

List the O&M activities that can be performed by the Owner's plant operator staff.

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f) Spare Parts:

Provide the following details for recommended replacement parts for the Motor Control Center Equipment components for five (5) years of operation:

Mid Line Pump Station MCC

Description	Quantity	Unit Price	Standard Delivery Time	Location
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
Note: The unit prices shall include all applicable custom duties, shipping charges to site and federal sales tax.				

Intake Pump Station MCC

Description	Quantity	Unit Price	Standard Delivery Time	Location
		\$		
		\$		
		\$		
		\$		
		\$		
		\$		
Note: The unit prices shall include all applicable custom duties, shipping charges to site and federal sales tax.				

APPENDIX C – SCHEDULE / LEAD TIMES FORM



Proposals must include this Appendix C – Schedule / Lead Times Form, with the requested information provided.

This section of your Proposal must be labelled as “Appendix C – Schedule / Lead Times Form” and must be uploaded with the Proposal as prompted by the ‘Document Upload’ instructions in the *Bids & Tenders* System.

Scoring Method:

- Pursuant to Part B of the RFP, the evaluation committee will determine during the ‘Mandatory Criteria’ phase whether the Form is a ‘Pass’ or ‘Fail’ according to the following criteria:

Score	Criteria
PASS	The Schedule Dates/Durations meet or exceed all of the Town’s date requirements, as detailed in Part A of the RFP Documents.
FAIL	The Proposal does not meet the ‘Pass’ criteria stated above.

1. Schedule Dates/Durations:

Provide the following details for Schedule Dates/Durations:

We undertake to supply and deliver to the following maximum timelines:

1. Shop drawings sent to Owner's Engineer for Review _____ week(s) from date of receipt of executed purchase contract.
3. Certified Drawings sent to Owner's Engineer ____ days after receipt of Reviewed Shop Drawings.
4. Installation, operating and maintenance manuals provided to Owner's Engineer _____ weeks from receipt of executed purchase contract.
5. All Equipment delivered DDP to Owner's specified site at Okotoks, AB within _____ weeks from Supplier's receipt of Reviewed Shop Drawings from the Owner.
6. Notification required for installation/training/equipment performance testing assistance: _____ days.
7. Submission of complete documentation after equipment performance testing: _____ days.

APPENDIX D – WARRANTY DETAILS FORM



Proposals must include an Appendix D – Warranty Details Form, with all requested information provided.

This section of your Proposal must be labelled as “Appendix D – Warranty Details Form” and must be uploaded with the Proposal as prompted by the ‘Document Upload’ instructions in the *Bids & Tenders* System.

Scoring Method:

- Pursuant to Part B of the RFP, the evaluation committee will determine during the ‘Mandatory Criteria’ phase whether the Form is a ‘Pass’ or ‘Fail’ according to the following criteria:

Score	Criteria
PASS	The Proposal includes all the details required in Section 1.
FAIL	The Proposal does not meet the ‘Pass’ criteria stated above.

1. Standard Warranty:

Provide, in a format of your choice, details on the Standard Equipment Supplier and Equipment Manufacturer warranties provided with the Equipment proposed, including the length of the warranty period, inclusions and exclusions (labour, parts, costs incurred).

Respondents should note the Owner’s requirement for an Equipment Warranty against defects in materials and workmanship, for a period of 24 months from completion of Equipment commissioning.

APPENDIX E – EXCEPTIONS TO CONTRACT FORM



Proposals must include this Appendix F – Exceptions to Contract Form, with all requested details completed. **No changes to this form shall be made**, except for completing the requested information in the spaces provided.

This section of your Proposal must be labelled as “Appendix F – Exceptions to Contract Form” and must be uploaded with the Proposal as prompted by the ‘Document Upload’ instructions in the *Bids & Tenders* System.

Evaluation Factors:

Factors to be considered during the evaluation in assessing the response to this Appendix will include:

- Ease for the Town in accepting any proposed exceptions to the terms and conditions.

1. Statement on Exceptions to Contract:

Please check **either** statement A **or** statement B below:

STATEMENT A:

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We have read the Contract in Part C and confirm we have no exceptions to the terms and conditions detailed, should we be selected as the Supplier.

We further understand that by selecting Statement A, the Town will be relying on this statement in the RFP evaluation, and there will be no further opportunity to make changes to the terms and conditions in Part C should we be selected as the highest-ranked respondent.

STATEMENT B:

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We have read the Contract in Part C and we have the following exceptions to the terms and conditions detailed, should we be selected as the Supplier:
(please specify exceptions in space below):