



Request for Proposals (“RFP”) Recipient Agreement Holder for Coast Mountain Natural Resource District Resource Investment Program

Request for Proposals Number: RA-24001

Issue date: May 6, 2024

Closing Time: Proposal must be received **before** 2:00 PM Pacific Time on: June 7, 2024

PwC Contact Person: All enquiries related to this Request for Proposals, including any requests for information and clarification, are to be directed, via email, to the following person who will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at PwC’s option.

Contact:

Jonathan Fane, RPF

Email: ca_forest_investment_account@pwc.com

Delivery of Proposals

Proposals must be sent by e-mail. Proposals are to be submitted as follows:

A. One complete electronic proposal must be received at:

Email: ca_forest_investment_account@pwc.com

Proposal emails must be submitted with the following information in the subject line:

- Response to RFP RA-24001, Attention Jonathan Fane – “Insert Corporate Name”

Only those proponents who have completed and submitted the “Bid Confirmation Form” (Appendix D) by May 17th, 2024 are able to submit a response to this RFP.

Proponent Section:

<i>Signature:</i>	<i>Legal Name of Proponent, and Doing Business As Name If Applicable:</i>
<i>Printed Name:</i>	<i>Address:</i>
<i>Title:</i>	
<i>Date:</i>	

The enclosed proposal is submitted in response to the above-referenced Request for Proposals, including any addenda. Through submission of this proposal we agree to all of the terms and conditions of this RFP and agree that any inconsistent provisions in our proposal will be as if not written and do not exist. We have carefully read and examined the Request for Proposals, including the Administrative Requirements, and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by statements and representations made in our proposal.

Table of Contents

Definitions and Administrative Requirements	1
Summary of the Requirement	3
Submission Criteria	4
Submission Requirements – Proponents Capabilities	7
Submission Requirements – Proponents Approach	9
Proposal Format	12

Appendices

Appendix A	Organizational Experience
Appendix B	Example Recipient Agreement
Appendix C	Cost Guidelines for 2024/25
Appendix D	Bid Confirmation Form

Definitions and Administrative Requirements

1. Definitions

Throughout this Request for Proposals, the following definitions apply:

- a) “Contract” means the written agreement (Recipient Agreement) resulting from this Request for Proposals executed by PricewaterhouseCoopers LLP (“PwC”) and the Contractor;
- b) “Contractor” means the successful Proponent to this Request for Proposals who enters into a written Contract with PwC;
- c) “Ministry” means the Ministry of Forests, Lands, and Natural Resource Operations;
- d) “must”, or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;
- e) “Proponent” means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals;
- f) “Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes the Ministry;
- g) “Request for Proposals” means the process described in this document; and
- h) “should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

The following terms and conditions will apply to this Request for Proposals. Submission of a proposal in response to this Request for Proposals indicates acceptance of all the terms that follow and that are included in any addenda issued by PwC. Provisions in proposals that contradict any of the terms of this Request for Proposals will be as if not written and do not exist.

3. Additional Information Regarding the Request for Proposals

All subsequent information regarding this Request for Proposals, including changes made to this document will be emailed directly to those Proponents who have expressed their intent to bid by completing and submitting the “Bid Confirmation Form” to PwC at faa@ca.pwc.com. As time permits and at the discretion of PwC, these updates may also be posted on the BC Bid website at www.bcbid.ca. It is the sole responsibility of the Proponent to keep up-to-date on any amendments to the proposal and to check the BC Bid website.

4. Late Proposals

Proposals will be marked with their “email” receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time.

Hard-copies of proposals will not be accepted and will be returned to the Proponent. Electronic proposals that are received late will be marked late and will not be considered or evaluated.

In the event of a dispute, the proposal “email” receipt time as recorded at the closing location shall prevail whether accurate or not.

5. Eligibility

- a) Proposals will not be evaluated if the Proponent’s current or past corporate or other interests may, in PwC’s opinion, give rise to a conflict of interest in connection with the project(s) described in this Request for Proposals. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with PwC’s Contact Person listed on the cover page of this RFP prior to submitting a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

6. Evaluation

Evaluation of proposals will be by a committee formed by PwC and will include employees of PwC. PwC reserves the right to consider including technical experts, and/or other persons selected by PwC with relevant experience and knowledge to enable a fair decision. All personnel will be bound by the same standards of confidentiality and will be independent persons. PwC’s intent is to enter into a Recipient Agreement with the Proponent who has met the requirements specified in this RFP and has the highest overall ranking as concluded by PwC.

7. Negotiation Delay

If a written Contract cannot be negotiated within fifteen days of notification of the successful Proponent, PwC may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposals process and not enter into a Contract with any of the Proponents.

8. Debriefing

At the conclusion of the Request for Proposals process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with PwC.

9. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

10. Changes to Proposals

By submission of a clear and detailed written notice by email, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by PwC for purposes of clarification.

11. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with PwC, if any. If PwC elects to reject all proposals, PwC will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

12. Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, 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.

13. Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

14. Currency

Currency for this contract is the Canadian dollar.

15. Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposals 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 charge.

16. Sub-Contracting

Using a sub-contractor (who should be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.

Sub-contracting to any firm or individual whose current or past corporate or other interests may, in PwC's opinion, give rise to a conflict of interest in connection with the project or program described in this Request for Proposals will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether a proposed sub-contractor gives rise to a conflict of interest, the Proponent should consult with PwC's Contact Person listed on page 1 prior to submitting a proposal.

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional sub-contractors will be added or other changes made to this list in the Contract without the prior written consent of PwC.

17. Acceptance of Proposals

- a) This Request for Proposals should not be construed as an agreement to purchase goods or services. PwC is not bound to enter into a Contract with the Proponent who submits the highest ranking proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. PwC will be under no obligation to receive further information, whether written or oral, from any Proponent.

- b) 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.

18. Definition of Contract

Notice in writing 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.

19. Contract

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with PwC on the terms set out in the "Recipient Agreement" (shown in draft in Appendix B).

20. Liability for Errors

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

21. Modification of Terms

PwC reserves the right to modify the terms of this Request for Proposals at any time at its sole discretion. This includes the right to cancel this Request for Proposals at any time prior to entering into a Contract with the successful Proponent.

22. Ownership of Proposals

All proposals submitted to PwC become the property of PwC. These will be received and held in confidence by PwC, subject to the provisions of this Request for Proposals.

23. Use of Request for Proposals

Any portion of this document, or any information supplied by PwC in relation to this Request for Proposals may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information supplied by PwC in relation to this Request for Proposals.

24. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of PwC, including the evaluation committee, or with members of the public or the media, about the project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by PwC.

Summary of the Requirement

As part of PricewaterhouseCoopers LLP’s (“PwC”) administration of the Forest Investment Program (the “Program”) program on behalf of the Ministry of Forests (“Ministry”), PwC is seeking a Proponent to enter into a Recipient Agreement with PwC to administer the Program activities and services generally in the Coast Mountain Natural Resource District (“Area of Interest”). The Program currently administers funds for projects under the responsibility of the Office of the Chief Forester.

Projects administered through the Program include those associated with reforestation (surveys, prescription development, site preparation, planting, brushing and spacing); forest fertilization (surveys, prescription development, application and monitoring); linear feature rehabilitation; ecosystem restoration; and forest inventory

Activities in the Coast Mountain Natural Resource District will initially include Wildfire Planting Prescriptions and Fertilization Surveys. Further details are as follows:

- Wildfire Planting Prescriptions located in TSA 10 in the Big Cedar River drainage. This project will consist of assessing areas within a 207 ha polygon that span both sides of the Big Cedar River. Access is from approximately 6 km on the Big Cedar mainline and from road systems that initiate from the Sterling/Meadow Creek area.
- Fertilization Surveys for 1995 ha located in the Nass and Kalum TSAs. This area is accessed via the Stewart-Cassiar Hwy and within the proximity of Terrace. Primary survey objectives are to collect forest health information and to enable stratifying into treatment units that meet the specified age range, species composition, site index, and crown closure parameters. See below for parameters.
 - Treatment maps should identify no-fertilization buffers for water features, typically to the width of standard FPPR Riparian Management Area (RMA) for the type and class of water features.
 - Fertilization Prescriptions must utilize the *Forests for Tomorrow – Forest Fertilization Prescription Template 2024-25*
 - Each Fertilization Prescription must include a georeferenced PDF Treatment Map. General format and content expectations for Treatment Maps are as specified in Article 3 of *Pre-stand Tending Survey and Prescription Development Standard – April 13, 2012, available here: <https://www2.gov.bc.ca/assets/gov/environment/natural-resource-stewardship/land-based-investment/forests-for-tomorrow/final-lbip-pre-stand-tending-survey-standard-march312012.pdf>*
 - Fertilization prescriptions will identify appropriate staging areas for operations and will identify feasible access.
 - Rationale’s required to identify areas ineligible for treatment (i.e. stands not meeting criteria, no feasible access, etc).
 - Parameters:
 - Species: Major component of Cw, Ss, Sx, Sw
 - Age 15-80
 - Site Index 18-32
 - Favourable room for crown expansion (i.e. >60% and <90%)

- First Nations information sharing for the proposed 2024 work (Wildfire Planting Prescriptions and Fertilization Surveys) will not be required as the nature of this year’s work is at the reconnaissance level with no treatments occurring, there is no need to engage with Nations on these activities. That is, the reconnaissance in and of itself will not lead to any decision for activity on the ground and therefore no potential for infringement on First Nations’ rights and interests.
- Subsequent treatments that result from these surveys (reforestation and aerial fertilization activities) will require First Nations information sharing. The survey information, maps and prescriptions will allow DCM staff to engage in meaningful consultation before contemplating undertaking a fertilizer application or tree planting program.

PwC anticipates entering into a Contract for the outlined services with an effective date of June 30, 2024 to March 31, 2027, with an option to renew or extend at the sole discretion of PwC. Future work may vary from year to year and therefore may include an additional scope of projects. Interested Proponents should note that PwC is seeking a firm that is able to administer funding related to a select list of projects (fertilization, silviculture strategies and other planning activities) and as such, interested Proponents must indicate past success in administration of similar programs in their response as such experience will be highly rated.

The anticipated program funding to be delivered under this Contract for the 2024/25 fiscal year is \$78,256 for activities as defined in the Ministry’s Forest Investment Program (“FIP”) and as directed to the Proponent by PwC. FIP was formerly known as the Land Based Investment Strategy (“LBIS”). More information on the LBIS can be found on the following web page:

Land Based Investment Strategy:

<https://www2.gov.bc.ca/gov/content/environment/natural-resource-stewardship/land-based-investment>

PwC advises that the final decision on work (and thus funding) to be completed in any given fiscal year will be determined based on the final funding PwC receives in the fiscal year for the Program and the current priorities of FIP as determined by the Ministry and in relation to the Program. PwC advises that as the successful Proponent of this RFP, there will be no guarantee in the level of work that will be carried out by the Proponent in a given fiscal year and thus, there is no commitment to provide a minimum (or any) administrative funds to the successful Proponent.

PwC also advises that the Area of Interest may be varied as PwC sees fit to ensure efficient and effective delivery of the services considered under this RFP.

Please Note: This opportunity to enter into a Recipient Agreement is offered by PwC and the agreement will be between the successful Proponent and PwC.

Background and Delivery

Historically, the Province of British Columbia has provided funding through a variety of programs (e.g. Forest Renewal BC, Forest Investment Account, Forests for Tomorrow, Forest Enhancement Society of British Columbia) focussed on investing in the forest and range resource.

Since 2002, PwC has been the administrator and delivery agent for these programs on behalf of the Ministry and will continue with this delivery for the Resource Investment Program (RIP) for the 2024/25 fiscal year.

The 2024/25 delivery model will utilize a combination of existing Recipient Agreement holders (such as the Federation of BC Woodlot Associations, the BC Community Forest Association, and forest licensees, etc) for the delivery of activities identified in the Program. With input from forest licensees and associations, Ministry staff will identify eligible projects, and PwC will work directly

with forest licensees, associations and other successful Proponents under a Recipient Agreement to complete projects on behalf of the Ministry.

The role of a Recipient Agreement holder is to ensure projects stay within approved budget limits; obtain and comply with the necessary authorization documents; tender projects in compliance with Recipient Agreement requirements; apply all funding directly against eligible costs; ensure work is completed to a level acceptable as identified in the standards and specifications; track project delivery; and provide PwC with final cost and performance summaries for each project completed.

The successful Proponent may be subject to a financial and technical audit of the work completed at any time during the term of the work.

Please Note: Interested parties are advised that opportunities for successful Proponents to complete field related work under this Recipient Agreement will be limited. It is PwC’s intent to select the successful Proponent based foremost on their ability to administer contracts to deliver the program of activities contemplated under this RFP.

Contract Management

The Proponent will be entrusted with the administration of program funds in relation to initiatives that are central to the health of the Province’s natural resources. While entrusting delivery to other parties, PwC must as part of its own contract with the Ministry ensure the maintenance of sufficient mechanisms to achieve an appropriate form and level of accountability from the Proponent.

PwC’s arrangement with the successful Proponent will involve, amongst other elements, the following mechanisms:

- a) Performance measures related to the activities of the Proponent (in addition to those relating to Recipient investment activity);
- b) Periodic review of the Proponent’s management of potential conflicts; and,
- c) Periodic review of the Proponent’s management of audit/review results and application of sanctions.

Delivery (Overhead) Allowance

Delivery allowance is an eligible project cost relating to a Recipient’s overhead expenses associated with planning, implementation and reporting and is based on rates as prescribed by the Ministry of Forests. Proponents are advised that **Delivery Allowance is only paid based on actual project dollars expended for eligible (and approved) projects** under a Recipient’s investment schedule or allocation as agreed to by PwC. The allowance is not paid if project work is not implemented, and thus incomplete. The delivery allowance rates for 2024/25 are approximately:

- 12% on the first \$100,000 of project work completed
- 8% on the remainder of project work completed

The rate is calculated for the entire investment schedule allocation using a “blended” rate formula that utilizes the delivery allowance rates as shown above (and as adjusted from time to time - annually). PwC’s web-based system, the Forest Investment Reporting System (“FIRS”), automatically calculates the delivery allowance per project based on the Recipient’s current allocation. The delivery allowance amount calculated for each project can be found in the Funding/Outputs Table in each project plan in FIRS.

The Cost Guidelines attached to this RFP (Appendix C) outline the project specific activities that this delivery allowance will cover. The successful Proponent must work with our Investment Management team to ensure their full understanding and acceptance of this “overhead” payment model.

Submission Criteria

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

Mandatory Criteria
a) The proposal must be received at the closing location before the specified closing time.
b) The proposal must be in English and sent by e-mail to ca_forest_investment_account@pwc.com in the format as specified in this RFP.
c) One electronic copy of the proposal must be submitted in PDF format. Only those Proponents that have expressed their interest to PwC by May 17, 2024 will be able to submit a proposal.
d) Proponents must submit a completed Appendix A (“Organizational Experience”) with their proposal.

The proposed weighting for scoring submitted responses is shown below. Proponents not meeting the minimum requirements in each scoring category (achievement of at least 66% of the points available) will be assigned a “fail” and not be further considered by PwC in the award process.

Categories	Weight
Approach	40%
Proponent Capabilities	60%
Total	100%

This is a “closed” bid process meaning that interested parties who have submitted a response to this RFP may inquire as to how their response ranked overall, but PwC will not be releasing the scores as these will be calculated “relative” to the other submissions received.

This RFP includes “Response Guidelines” which are intended to assist Proponents in the development of their proposals. The Response Guidelines are not intended to be all-inclusive and Proponents should use their own judgement in determining what information should be provided to demonstrate that the Proponent will meet, has met, or has exceeded PwC’s expectations.

Cost Guidelines and Recipient Agreement

Attached in Appendix B is an example of the Recipient Agreement that the successful Proponent will enter into with PwC for the administration of the work assigned to the Proponent in the 2024/25 fiscal year. The final version of this agreement will be presented to the successful Proponent upon notification of the opportunity to enter into this agreement with PwC.

Appendix C outlines the draft Cost Guidelines for the 2024/25 fiscal year (these may be amended from time to time) for the LBI as administered by PwC. Proponents should note the acceptable hourly rates for its' professional and technical staff for work carried out under the signed Recipient Agreement, as well as requirements for professional designations. These rates apply to administration and delivery of the work assigned to the successful Proponent under this RFP. The successful Proponent's assigned staff will be able to claim hourly rates that are appropriate to the task assigned and completed (i.e., technical work will be paid at technical hourly rates, etc). These rates do not apply to work contracted by the successful Proponent.

Note: For this RFP, there are no “financial submission” requirements – i.e., no financial offering is required from the interested Proponent when submitting a response to this RFP.

Submission Requirements – Proponents Capabilities

Proponent Organizational Experience

Proponent organizations should demonstrate five or more years experience within three projects that include delivering services of a similar scope and complexity. The successful Proponent should demonstrate the ability to manage multiple activities or projects simultaneously, and ensure quality work is completed, on time and on budget. Skills and competencies include, but are not limited to, the following:

- A relationship with the natural resource sector in BC;
- Successful management of large forest management contracts (greater than \$250,000) or multiple contracts concurrently;
- Experience in completing forest management projects in the Area of Interest (a local office and existing relationships within the surrounding Area of Interest as contemplated under this RFP is a factor);
- Sound budget, accounting systems, and financial management experience; and
- Ability to work independently.

Response Guidelines

Proponents must provide a completed Appendix “A”.

Note 1: Experience gained prior to 2015 will not be considered.

Note 2: If more than 3 projects are included, PwC will only consider the first 3 in the order provided in the proposal.

Note 3: Previous successful experience and relationships with PwC are an asset.

Note 4: Experience in planning, prescribing and implementing reforestation projects (greater than 500,000 seedling planting projects) will be considered an asset.

Note 5: Experience in planning, prescribing and implementing aerial fertilization projects will be considered an asset.

Key Personnel

Proponents are expected to name a core team of individuals who will provide the services required by PwC. Note that Proponents are not expected to name everyone who might work on the contract, but rather a core team (for example, 3-5 listed individuals) that will provide the majority of the applicable services relating to a Recipient Agreement holder. One individual can be named to more than one area of responsibility, but Proponents are advised that the overall plan should not rely heavily on the availability of one person.

The extent of the work involved in this RFP will necessitate a staff/team with complementary skills (including financial management). Activities that require the Recipient’s administration and monitoring may take place in several locations simultaneously and the ability to manage this work successfully is a key aspect of this offering.

Proponents are advised that if the intent is to utilize sub-contractors within their offering, then the Proponent must provide a list of the sub-contractors that they intend to utilize in the administration of the FIP projects.

Each individual named should have five or more years experience in the role for which they are proposed and five or more years experience working with or in the Canadian natural resource sector.

Note: PwC expects that all individuals named as Key Personnel will be available for the duration of the Contract term. Any changes to the Key Personnel will require the prior written approval of the PwC. This applies ONLY to the named Key Personnel, not to any individual who might be assigned to work on the specific project work. PwC reserves the right to reject proposed resources who in the sole opinion of PwC are not qualified to provide these services.*Response Guidelines*

The Proponent should outline the staff, team, sub-contractor or partnerships they will use under the Recipient Agreement including names, qualifications, and experience in forest management projects consistent with the Program, including expertise/experience in financial management. Resumes (to be attached in an Appendix to the response) for each staff resource is limited to two pages. Include dates (month and year) when this experience was gained and the names of the client for which the services were provided.

First Nations Partnerships

First Nations participation in the Program, specifically provision of employment services related to the Recipient Agreement during the implementation of the Program should be described in the response to this RFP.

Response Guidelines

The Proponent should outline First Nations partnerships they will use under the Recipient Agreement including names, qualifications and experience in forest management projects consistent with the Program. Include details on how the First Nations partnership will be incorporated into the implementation of Program activities.

Related Experience with PwC as Administrator

The Program is administered by PwC and as the Administrator, PwC accepts work plan proposals from Recipients, approves projects and budgets, verifies fieldwork and certifies project completion. Funding is advanced to PwC by the Ministry for the completion of this work. PwC, and the successful Proponent (by way of the Recipient Agreement), will be entrusted with the administration of government funds in relation to initiatives that are central to the health of the Province's natural resources. While entrusting delivery to other parties (such as PwC), the Province maintains mechanisms to achieve an appropriate form and level of accountability. As such, PwC expects that its' Recipients meet similar accountabilities and be a trusted delivery agent for PwC.

Response Guidelines

Preference will be given to Proponents that can demonstrate familiarity working directly with PwC and PwC's business processes. This experience with PwC may have been gained through a variety of BC Government funding programs, including the Forest Investment Program ("FIP"), Forests For Tomorrow ("FFT"), Forest Enhancement Society of British Columbia ("FESBC") or the British Columbia Community Forest Association Crown Land Wildfire Risk Reduction Program ("CLWRR").

Submission Requirements – Proponents Approach

Financial Management

The Recipient will be responsible for managing large forest management contracts (potentially greater than \$250,000) and will be responsible for initiating projects with no or partial advances of funding from PwC. Full payment on FIP projects will only be made upon the successful submission of project deliverables and the required information as detailed by PwC at project approval. PwC may institute a system of holdbacks and/or disburse payments to the successful Proponent based on work completed. A predetermined amount of funding will be held by PwC until the project is successfully completed and final deliverables have been verified by PwC.

Response Guidelines

The Proponent should outline a financial management plan to demonstrate their ability to manage funding based on partial funding advances and Quarterly payments based on project milestones. The Proponent should also outline their ability to manage a funding holdback on projects they deliver utilizing “on the ground” activity-specific sub-contractors.

Note 1: The successful Proponent may be required to create a segregated trust account or imprest account into which project funding may be advanced and held (as required by the Administrator).

Note 2: A standard, commercial letter of credit issued by the Recipient’s financial institution for up to 20% of the LBI project funding may be required prior to award of the Recipient Agreement.

Quality Assurance/Quality Control

Quality Assurance and Quality Control is a critical component of this Recipient Agreement contract. The various forest management activities in the LBI program, including but not limited to planting, site preparation, fertilization, spacing, and forest inventory all require quality control checking. In addition, PwC will conduct audits of work completed.

Response Guidelines

The Proponent should outline a Quality Assurance/Quality Control Plan that will cover the major activities that will be conducted under their Recipient Agreement. This outline should include monitoring procedures, sampling frequency, reporting, risk management, staff, staff experience, financial budget management, scheduling and other considerations.

The Proponent should also identify experience in preparing for and responding to audits of similar nature as completed under the FIP or programs of similar nature.

Note: all costs related to preparing for and attending an audit will be borne by the Recipient Agreement holder and as specified in the Cost Guidelines for the FIP. Audits are conducted at the discretion of PwC and Recipient involvement in the process is mandatory.

Project Cost Analysis

The successful Proponent will prepare budgets and work plans for projects to be submitted to PwC for review and approval. The successful Proponent will be expected to examine all project costs for eligibility and value using past experience and cost/benefit analysis generated from previous experience with investment programs (such as FFT). Some of this information may be provided by the Ministry (by means of the program website and as shown as cost caps) and some may be contained within the corporate knowledge/experience of the Proponent.

Response Guidelines

Explain what elements the Proponent intends to examine when conducting cost analysis of projects, clearly describing how these elements will ensure eligibility and value.

Reporting

Upon completion of the projects, Recipients have 30 days to submit project completion reports to PwC. These reports will advise PwC of the final project success and any deviation to stated objectives and budgets, and in turn authorize final payments against the project.

Before submitting a completion report, all deliverables must be received by the appropriate government repository in the required format. Once the completion report is submitted, the Recipient is required to deliver a completed Schedule “A” (see Recipient Agreement for a draft version) to PwC. This should be e-mailed (pdf format; fax is acceptable but not favoured) in order to be received within 30 days of the project completion or by the stated final day for completion at the end of the year (to be determined by PwC), whichever is sooner.

The Recipient will also provide the following reports to PwC (this is a sample of some of the reporting requirements; more may be required as directed by PwC):

- a) Monthly reports, which may include information on projects’ assets, liabilities, administration, cash flows, and project expenditures;
- b) Quarterly reports, which provide an overview of activities, program analysis, administrative analysis, etc; and
- c) A fourth quarter “completion” report of all projects completed.

Also, for projects that involve silviculture activities, information must be entered into the provincial database using RESULTS. Accurate, up-to-date RESULTS information is a very critical aspect of this RFP and subsequent work.

Response Guidelines

The Recipient is responsible for ensuring accurate reporting as requested by PwC. The Proponent should explain how accurate and timely reporting will be achieved (including entry of the desired data into provincial databases such as RESULTS).

Liaising with Federal and Provincial Government, Forest Licensees, First Nations, the Public and other groups

The Recipient will regularly liaise with Federal and Provincial Government ministries, Forest Licensees, First Nations, the Public and other groups in order to carry out work under the FIP. The Recipient may be expected to provide project information to interested groups and to engage these groups pro-actively using methods that may include: hosting meetings on relevant topics of interest; information sharing; attending meetings; and providing written materials on the Program, etc.

Response Guidelines

The Proponent should outline their experience working with Federal and Provincial Government ministries, Forest Licensees, First Nations, the Public and other groups, and the steps that they will take to build upon these existing relationships, including First Nations information sharing. Details of local experience, existing relationships and an indication of an existing local “Proponent” office should be provided in the response.

Standards & Specifications

All activities under the FIP program are carried out in accordance with Standards. Examples of these Standards may be found on the Forests For Tomorrow (“FFT”) website:

<https://www2.gov.bc.ca/gov/content/environment/natural-resource-stewardship/land-based-investment/forests-for-tomorrow/activity-standards-related-information>

Response Guidelines

The Proponent should demonstrate familiarity with the Ministry standards that generally apply to the work under this RFP. The proposals should explain the steps that will be taken to ensure that any sub-contractors are aware of, and working to Ministry standards.

Sanction Management

Where applicable, the Recipient will be required to manage the administration of sanctions pursuant to non-performance of sub-contractors' projects. The Proponent will be the sole decision-maker for a variety of decisions, including but not limited to:

- a) The disallowance of ineligible expenditures (upon review of project completion summaries or through audit/review);
- b) The requirement for work to be performed or re-performed to achieve the required standard; and
- c) The recovery of funds to complete work to the required standard.

In major and/or sensitive cases, the successful Proponent will seek confirmation of proposed decisions from PwC (but decision-making by PwC will only occur in exceptional circumstances as defined by PwC and any reliance on PwC for such decisions should not be contemplated by the Proponent). PwC will be responsible for any examinations and decisions pursuant to irregularities or unacceptable ongoing performance by Program Recipients.

Response Guidelines

Explain how the Proponent intends to mitigate risk related to sub-contractor performance, and how they will manage sanctions against sub-contractors and specific projects, including the escalation procedures that may be necessary if a sub-contractor does not agree with the sanction assessed and/or is non-responsive to the situation. Be sure to address the circumstances under which PwC would be informed of the situation.

Tender Management

As per the Recipient Agreement, the Recipient will be required to tender a percentage of LBI funding received to ensure good value for the investment activity / project work to be completed. There are a number of acceptable methods to achieve this requirement including open tendering and select invitation. These requirements for tendering, including the tendering percentage, will be provided by PwC in each specific fiscal year. Non-conformance to this policy may lead to cancellation of the Recipient Agreement and repayment of funds by the Recipient which in the sole discretion of PwC are deemed as unacceptable.

Response Guidelines

Explain how the Proponent intends to manage a program of tendering during the fiscal year. Be sure to address past experience in administering and delivering such a program and other considerations that the Proponent feels must be taken into consideration in such a tendering situation.

Conflict of Interest

There is an inherent potential conflict of interest, to the extent that the Proponent has an existing relationship with sub-contractors and potential sub-contractors, as certain decisions to be made by the Proponent may have the potential to benefit or negatively affect any existing business relationships. It will therefore be necessary to establish mechanisms to address this potential conflict. As the Proponent will be required to tender out specific works to other sub-contractors,

then a clear and accountable process must be established to avoid perceptions of any conflict in project work awarded.

Response Guidelines

Describe how the Proponent intends to recognize and manage any real or potential conflicts of interest with sub-contractors and the work contemplated.

Proposal Format

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

- a) All pages should be consecutively numbered.
- b) An unaltered and completed Request for Proposals cover page, including Proponent Section completed as per instructions.
- c) Table of contents including page numbers.
- d) A short (one or two page) summary of the key features of the proposal.
- e) The body of the proposal which follows the categories as shown under the Submission Criteria of this RFP.
- f) Appendices, with relevant information appropriately tabbed and referenced. Proponents are asked not to submit corporate profiles and related literature.

Appendix A Organizational Experience

NOTES FOR USING THIS FORM:

Proponents are advised to complete this form IN FULL for each project.

When completing this “Organizational Experience Summary” Proponents are advised to provide information BY PROJECT, and to *include three recent projects* to demonstrate that the Proponent has the experience being sought. These projects shall describe how the Proponent organization experience meets or exceeds PwC’s expectations, as per the Submission Requirements in this RFP.

NOTE: If PwC decides to check references, the information provided by the references will be used in conjunction with the proposal to evaluate this section of the RFP response.

Evaluators will be looking at the dates cited to determine a length of experience. Proponents are advised to include both the MONTH and the YEAR for each program / project / assignment.

Proponent’s Legal Name:	
--------------------------------	--

Demonstrated Experience – Programs / Projects / Assignments	
Project No. 1 Name:	
Dates Services were provided (Month/Year - Month/Year):	
<i>Provide specific details about a project you have been engaged on to clearly demonstrate your expertise. For example, indicate the details about the project and your role and accomplishments in the project, etc.</i>	
Project Lead:	
Project Team Key Personnel:	
Approved Contract Budget:	\$
Final Contract Budget:	\$
Client References	
Client Organization (i.e. program / project / assignment owner):	
Client Contact:	
Contact’s Title:	
Contact’s Telephone Number:	
Contact’s e-mail:	

Demonstrated Experience – Programs / Projects / Assignments	
Project No. 2 Name:	
Dates Services were provided (Month/Year - Month/Year):	
<i>Provide specific details about a project you have been engaged on to clearly demonstrate your expertise. For example, indicate the details about the project and your role and accomplishments in the project, etc.</i>	
Project Lead:	
Project Team Key Personnel:	
Approved Contract Budget:	\$
Final Contract Budget:	\$
Client References	
Client Organization (i.e. program / project / assignment owner):	
Client Contact:	
Contact's Title:	
Contact's Telephone Number:	
Contact's e-mail:	

Demonstrated Experience – Programs / Projects / Assignments	
Project No. 3 Name:	
Dates Services were provided (Month/Year - Month/Year):	
<i>Provide specific details about a project you have been engaged on to clearly demonstrate your expertise. For example, indicate the details about the project and your role and accomplishments in the project, etc.</i>	
Project Lead:	
Project Team Key Personnel:	
Approved Contract Budget:	\$
Final Contract Budget:	\$
Client References	
Client Organization (i.e. program / project / assignment owner):	
Client Contact:	
Contact's Title:	
Contact's Telephone Number:	
Contact's e-mail:	

Appendix B Example Recipient Agreement

(see pdf attached with this RFP)

Appendix C Cost Guidelines for 2024/25

(see pdf attached with this RFP)

Appendix D Bid Confirmation Form

RECIPIENT AGREEMENT HOLDER RFP
REQUEST FOR PROPOSALS # RA-21002

CLOSING DATE AND TIME: JUNE 7, 2024 BEFORE 2:00 P.M.
Please return this form by email as soon as possible, and **no later than May 17, 2024** to:

Jonathan Fane, RPF
Email: ca_forest_investment_account@pwc.com

COMPANY:

STREET ADDRESS: _____

CITY: _____ **PROVINCE:** _____

POSTAL CODE: _____

MAILING ADDRESS, IF DIFFERENT:

FAX NUMBER: _____ **PHONE NUMBER:** _____

CONTACT PERSON: _____

TITLE: _____

E-MAIL ADDRESS: _____

Proponents: Please note all subsequent information will be emailed directly to those Proponents who have expressed their intent to bid by completing and submitting the “Bid Confirmation Form” to PwC at ca_forest_investment_account@pwc.com. As time permits and at the discretion of PwC, these updates may also be posted on the PwC FIRS website at lbip.outcome-plus.com/Advertisement/AdvertisementLanding. It is the sole responsibility of the Proponent to keep up-to-date on any amendments to the proposal and to check the FIRS website.

Proponents Response:

We will be submitting a proposal and wish to be informed of any updates to the RFP.