



Request for Proposal for Services

Arboriculture Apprenticeship Program – Level 1 (Arborist)

RFP # 001

Issue date: Sept 15, 2009

Closing location:

HortEducationBC
Suite 102-176A Street
Surrey, BC, V3S 6S6

Closing date and time:

8 complete hard copies and one complete electronic copy of each proposal must be received before 2:00 PM Pacific Time on October 23, 2009. The subject line of the email for the electronic copy MUST say "Response to HEBC" to avoid being blocked by HEBC's email spam filter.

Proponents meeting, October 14, 2009, at 10:00am in the HEBC Office
Attendance at the Proponents' meeting is not mandatory

**Anne Kadwell President/CEO
HortEducationBC
Suite 102 5783-176A Street
Surrey, BC
V3S 6S6**

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**REQUEST FOR PROPOSAL
ARBORICULTURE TRADE TRAINING PROGRAM
RFP #001**

1 SUMMARY OF THE REQUIREMENT

In May, 2009, the Industry Training Authority (ITA) approved an apprenticeship training program for the Arboriculture Trade. HortEducationBC (HEBC), the lead organization, along with the Arboriculture Technical Standards Committee is now seeking assistance in the development of tools for the delivery of the first level of the Trade – Arborist.

This RFP outlines the tools to be developed and some critical decisions in the process of that development. The templates developed for these tools will be the basis for development of the Level 2 (Climbing Arborist) and Level 3 (Field Arborist) Certificate of Qualification programs.

The Arboriculture Technical Standards Committee is made up of representatives of the Arboriculture industry and will be the group responsible for selecting the successful proponent and directing the work. Funding is provided by the ITA through HEBC.

2 TERMS AND CONDITIONS

All of the terms and conditions that follow will apply to this Request for Proposal. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the terms that follow and that are included in any agenda issued by the Industry Training Authority. Provisions in proposals that contradict any of the terms of this Request for Proposal will be as if not written and do not exist.

3 REQUEST FOR PROPOSAL PROCESS

3.1 Receipt Confirmation Form

Proponents are advised to fill out and return the attached Receipt Confirmation Form. All subsequent information regarding this Request for Proposal, including changes made to this document will be directed only to those Proponents who return the form. In most instances, subsequent information will be distributed by email.

3.2 Enquiries

All enquiries related to this Request for Proposal are to be directed, in writing and preferably by 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.

Contact:

Anne Kadwell
HortEducationBC
Suite 102'5783 – 176A Street
Surrey, BC
akadwell@horteducationbc.com

3.3 Proponents' Meeting

A Proponents' meeting will be held at Oct 14, 2009, HEBC office at 10:00am. Attendance is optional.

Oral questions will be allowed at the Proponents' meeting. Minutes of the meeting will be distributed to those Proponents who have returned the Receipt Confirmation Form. However, questions of a complex nature, or questions where the Proponent requires anonymity, should be forwarded in writing, prior to the meeting, to the person designated above.

3.4 Closing Date

The stipulated number of complete copies of each proposal must be received before 2:00 pm PDT, on the closing date shown on the front page of this Request for Proposal. The closing location is:

**HortEducationBC
Suite 102
5783 – 176A Street
Surrey, BC V3S 6S6
Anne Kadwell President/CEO**

Proposals must not be sent by facsimile. Proposals and their envelopes should be clearly marked with the name and address of the Proponent, the Request for Proposal number, and the project or program title.

3.5 Estimated Time-Frames

The following timetable outlines the anticipated schedule for the Request for Proposal and contract process. The timing may vary and shall ultimately be determined by HortEducationBC. HortEducationBC will not be responsible for any costs incurred by the Contractor related to changes in the estimated time-frames.

Event	Anticipated Date
Request for Proposal re-issued	September 14, 2009
Deadline for submitting questions	October 7, 2009
Proponents' meeting	October 14, 2009
Request for Proposal closes	October 23, 2009
Proposal Evaluation completed	October 27, 2009
Contract is signed	November 2, 2009
Service delivery starts	November 2, 2009
Service completion	May 15, 2009

4 SITUATION/OVERVIEW

4.1 Introduction and Background

The Tree Care (Arboriculture) Industry (not including Utility Arborists) provides tree management services for a wide variety of residential and commercial customers. In addition, most municipalities and regional districts have arborists on staff. These services range from pruning dangerous trees through the use of aerial lift trucks and by climbing trees, to management of tree pests and diseases in an urban landscape setting. Knowledge of arboriculture, proper techniques and hands-on skills are instrumental to carrying out these jobs safely and effectively.

For some time there has been a concern in the Arboriculture Industry regarding the lack of qualified personnel and standardized skills training. Of particular concern to employers is inconsistency in safety practices training. Workers are climbing, and trimming and removing trees with a variety of specialized cutting tools and their safety is paramount.

Knowing of this concern, in 2007 HortEducationBC approached a group of Arboriculture Industry employers and employees to assist in the development of an apprentice training program. Subsequently, a Services Canada/Province of BC agreement was negotiated and development work undertaken. The outputs of the development work are a series of industry surveys and consultations culminating in the development of the occupational analysis, profile chart, program outline, marketing plan and a proposal to the ITA for accreditation of an Arboriculture Apprenticeship program.

With the approval of the proposal from the ITA the Arboriculture Program/Trade will be implemented over the next three years with pilot delivery of the first level (Arborist) in-class training planned for January 2010. Subsequent pilots are planned for the Climbing Arborist (Level 2) in January 2011 and Field Arborist (Level 3) in January 2012. The three levels are:

- 1) Entry level training where the worker is primarily on the ground and within 3 meters of the ground on ladders. The exit point for this training will result in a Certificate of Qualification (C of Q) **Arborist**.
- 2) The second level of training will focus on climbing skills and technical skills used while working in trees, resulting in a C of Q **Climbing Arborist**.
- 3) The final level of training is in advanced tree management including development of pest management plans, tree and site assessment and site management skills. This will result in a C of Q **Field Arborist**.

Concurrent with the development of the learning and assessment resources resulting from the selection of a contractor through this RFP, the Committee will be soliciting expressions of interest from training providers for the delivery of the in-school training pilots.

This RFP relates only to the development of tools for the delivery of Level 1 of the program – Arborist.

4.2 Overview of Required Service

1. A description of the approach you would take to complete the required work including:
 - a. Methodology, key steps, opportunities for industry and other consultation
 - b. Tactics for efficient and effective use of industry representatives
 - c. Expectations of the Steering Committee – role and responsibilities
2. A description in your own words of the deliverables you will complete and the expected dates of delivery.
3. A budget identifying professional fees and a break-down of hours and rates for each contractor team member as well as anticipated out-of-pocket expenses. Meeting rooms will be provided by HEBC and travel rates must be at Provincial Treasury Board levels.
4. A preferred schedule of payments based on completion of deliverables.
5. A description of the project team including:
 - a. Role and individual strengths of each member
 - b. CV for all of the team members
 - c. Description of experience with similar projects
 - d. Description of experience in the arboriculture or horticulture fields
6. Client references for similar projects.

5 DETAILED REQUIREMENTS

Working from the Arboriculture Program Outline for the Arborist (Level 1) the selected contractor will:

1. Lead a process involving representatives of industry in identifying which competencies are best learned and assessed in school versus those best learned and assessed on a job site;
2. Identify performance descriptions for practical skills to be learned in school;
3. Identify performance descriptions for practical skills to be learned on the job;
4. Identify existing learning and assessment resources which can be adopted or adapted for use in training. These will include texts, audio-visual resources, etc.;
5. Prepare participant manuals and instructor guides for the Arborist Level in-school training. These will include quizzes and practical assessment tools suitable for daily use in the school;
6. Prepare assessment tools for job-site learning. The contractor will work with the Committee to determine the best templates for such tools which may or may not include log books, attestations, etc.;
7. Prepare a Table of Specifications per ITA standards for creation of an exam bank for Arborist C of Q;

8. Prepare and validate an ITA exam bank (maximum 300 questions – actual number to be determined through research and consultation);
9. Work with the Committee to determine the recommended “blend” of theory (ITA exam) and practical marks (in-school) required for C of Q completion;
10. Using the tools developed to prepare a Challenge process for achievement of an Arborist C of Q;
11. Recommend duration of in-school training necessary to address the learning requirements;
12. Recommend alternate school delivery models.

All deliverables will be completed using the greatest possible input from industry, the ITA and appropriate other stakeholders and drawing on existing resources.

Deliverables

1. A Participant Manual for Arborist apprentices
2. An Instructor Guide for Arborist in-school training
3. On-job mentoring and assessment guide (if decided as such)
4. Table of Specifications per ITA standards for examination for the Arborist C of Q.
5. Exam bank per TOS and ITA requirements
6. Summary of Challenge process and tools for an Arborist C of Q
7. Pilot program plan
8. A final report summarizing products and recommendations for program delivery.

6 FORM OF CONTRACT

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with HortEducationBC.

7 EVALUATION

This section details all of the mandatory and desirable criteria against which proposals will be evaluated. Proponents should ensure they fully respond to all criteria in order to receive full consideration during evaluation.

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.

Criterion
The proposal must be received at the closing location before the specified closing time
The proposal must be in English and must be submitted in both hard copy and electronic copy. Faxed copies will not be evaluated.
The proposal must be signed by a person authorized to sign on behalf of the Proponent.

7.2 Desirable Criteria

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

Mandatory Criteria	Weight		
○ Electronic version received by closing date and time	0	Yes/no	
○ Availability to commence work by Aug 09	0	Yes/no	
Desirable Criteria – each component to be scored separately	Weight	Maximum Score	Minimum Requirement
Understanding of client objectives and context <ul style="list-style-type: none"> ○ Demonstrated understanding (in the submission) of the overall goals and the problem to be addressed ○ Clear and appropriate description of the deliverables to which the proponent is committing ○ Awareness of industry and project context ○ Extent to which proposal addresses all stated requirements 	15%	15	
Suitability of Proposed Methodology <ul style="list-style-type: none"> ○ Clarity of approach and likelihood of the success of the approach ○ Appropriateness and extensiveness of Subject Matter Expert involvement (efficient and effective use of industry personnel) ○ Measures and approaches to ensure greatest possible industry validation of deliverables ○ Effective use of existing materials, resources and expertise 	30%	30	
Experience with Similar Projects <ul style="list-style-type: none"> ○ Organizational experience with similar projects ○ Experience with development of materials and resources similar to those required in this project ○ Experience of staff to be dedicated to the project as reflected in resumes ○ Suitability and Accessibility of the proposed project leader ○ Proposed composition of the work team does not indicate any gaps in skills or experience to do the work ○ Reasonableness of work plan and time tables 	35%	35	
Cost Effectiveness <ul style="list-style-type: none"> ○ Reasonableness of per diem rates in respect to tasks to be performed ○ Efficiency in use of project personnel and sequencing of steps ○ Capacity to take on entire project ○ Overall best use of funds 	10%	10	

Other considerations – creativity of approach, industry and educational connections, other relevant knowledge brought to the project, additional value offered by team	10%	10	
TOTAL POINTS		100	

8 HOW TO RESPOND

8.1 To Meet Mandatory Criteria

Your proposal will be reviewed by an evaluation committee. The committee will first score the mandatory criteria. If any one of the mandatory criteria is not clearly met, your proposal will receive no further consideration. So in order to receive full consideration:

- a) Make sure the specified number of copies of the proposal as well as the electronic copy are received at the closing location by the specified closing date and time (see cover page).
- b) Submit proposal in hard copy. Make sure you send the requested number of copies (see cover page) and include an electronic version – by email or on a CD-ROM – that contains identical information to that contained in the hard copy. The electronic copy should include any appendices, attachments or brochures.
- c) Make sure your proposal is signed. Please include a signed letter or statement substantially similar in content to the following wording:

“The enclosed proposal is submitted in response to the above-referenced Request for Proposal, including any addenda. Through submission of this proposal we agree to all of the terms and conditions of the Request for Proposal 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 Proposal, including the Definitions and 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.”

8.2 To Meet Desirable Criteria

If your proposal meets all the mandatory criteria, the committee will then evaluate your response to each of the desirable criteria. The committee will have a points score available for each of the following questions so, in order to score well, you are advised to fully address each of the following questions, preferably in the order in which they are presented.

PROPONENT CAPABILITY AND EXPERIENCE

- a) Provide an overview of your company background, including number of employees, the length of time you have been in business; the names of your major clients.

- b) Describe your previous experience in delivering services similar to those requested by the Industry Training Authority.
- c) Describe the roles and responsibilities of key staff members and include resumes or a description of the qualifications of staff members proposed for the project.

Proposed service or methodology

The proposal should provide an executive summary to enable Steering Committee members who are not on the proposal evaluation subcommittee but needing to have an overview of each proposal.

Provide a project plan, complete with time lines, showing the key tasks to be undertaken.

- a) Describe your proposed methodology.
- b) Reports are to be circulated at least 3 days before Steering Committee meetings in order to permit time for pre-reading and review.
- c) Upon selection of a contractor, a schedule of meetings with the Steering Committee will be established over the term of the work.
- d) Bi-weekly progress reports will be provided by email to the Executive Director of HEBC;
- e) Reports and products will be provided electronically in Microsoft Word or Exel as appropriate

Price

The budget for this work is \$52,000. The schedule of payments will be negotiated with the successful proponent based on their preferred schedule of payments and the completion of satisfactory deliverables.

References

References of the Proponent scoring the highest against the desirable criteria may be contacted. The HEBC will not enter into a Contract with any Proponent whose references, in the HEBC's sole opinion, are found to be unsatisfactory.

Provide names, corporate affiliations, and telephone numbers of three recent clients who can attest to the Proponent's ability to provide a quality service similar to that outlined herein.

1. Definitions

Throughout this Request for Proposal, the following definitions apply:

- a. "Contract" means the written agreement resulting from this Request for Proposal executed by the HEBC and the Contractor;
- b. "Contractor" means the successful Proponent to this Request for Proposal who enters into a written Contract with the HEBC;
- c. "must", or "mandatory" means a requirement that must be met in order for a proposal to receive consideration;
- d. "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal;
- e. "Request for Proposal" or "RFP" means the process described in this document; and
- f. "should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposal.

2. Late Proposals

Proposals will be marked with their 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 late proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail whether accurate or not.

3. Eligibility

- a. Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the HEBC's opinion, give rise to a conflict of interest in connection with the project described in this Request for Proposal. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Proposal. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the

Contact Person listed on the cover page 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.

4. Evaluation

Evaluation of proposals will be by a committee formed by the HEBC and may include employees and contractors of the HEBC. All personnel will be bound by the same standards of confidentiality. The HEBC's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

5. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the HEBC 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 Proposal process and not enter into a Contract with any of the Proponents.

6. Debriefing

At the conclusion of the Request for Proposal process, all Proponents will be notified by HEBC.

7. Alternative Solutions

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

8. Changes to Proposals

By submission of a clear and detailed written notice, 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 the HEBC for purposes of clarification.

9. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the HEBC,

if any. If the HEBC elects to reject all proposals, the HEBC 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.

10. 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.

11. Proposal Validity

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

12. Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposal specifically states otherwise.

13. Currency and Taxes

Prices quoted are to be in Canadian dollars; inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and exclusive of Goods and Services Tax and Provincial Sales Tax.

14. Completeness of Proposal

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

15. Sub-Contracting

- a. 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 be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.

- b. Sub-contracting to any firm or individual whose current or past corporate or other interests may, in the HEBC's opinion, give rise to a conflict of interest in connection with the project or program described in this Request for Proposal will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposal. If a Proponent is in doubt as to whether a proposed subcontractor gives rise to a conflict of interest, the Proponent should, prior to submitting a proposal, consult with the identified HEBC contact.
- c. Where applicable, the names of approved sub-contractors 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 HEBC.

16. Acceptance of Proposals

- a. This Request for Proposal should not be construed as an agreement to purchase goods or services. The HEBC is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The HEBC 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.

17. 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.

18. Liability for Errors

While the HEBC has used considerable efforts to ensure information in this Request

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

19. Modification of Terms

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

20. Ownership of Proposals

All proposals submitted to the HEBC become the property of the HEBC. They will be received and held in confidence by the HEBC, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this Request for Proposal.

21. Use of Request for Proposal

Any portion of this document, or any information supplied by the HEBC in relation to this Request for Proposal 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 the HEBC in relation to this Request for Proposal.

22. Reciprocity

The HEBC 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.

23. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the HEBC, including the evaluation committee and any elected officials of the HEBC, or with members of the public or the media, about the project described in this

Request for Proposal or otherwise in respect of the Request for Proposal, other than as expressly directed or permitted by the Industry Training Authority.

24. 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 this Request for Proposal requires Proponents to provide the HEBC with personal information of employees who have been included as resources in response to this Request for Proposal, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the HEBC. Such written consents are to specify that the personal information may be forwarded to the HEBC for the purposes of responding to this Request for Proposal and use by the HEBC for the purposes set out in the Request for Proposal. The HEBC 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 HEBC.

APPENDIX A: RECEIPT CONFIRMATION FORM

**Arboriculture Apprenticeship Program
Closing date: October 23, 2009
Request for Proposal No. 0001
HortEducationBC**

To receive any further information that might become available with regard to this Request for Proposal, please return this form to:
Anne Kadwell, HortEducationBC, akadwell@horteducationbc.com, fax: 604-574-7773

Company: _____

Street address: _____

City/Province: _____ **Postal Code:** _____

Phone number: _____ **Fax number:** _____

Contact person: _____

e-mail: _____

Signature: _____

Title: _____

Proponents' Meeting We will be sending _____ (number) representatives to the Proponents' meeting.

We will not be attending the Proponents' Meeting but will probably be submitting a proposal.
