



**THE CITY OF WINNIPEG**

# **REQUEST FOR PROPOSAL**

**RFP NO. 313-2026**

**PROFESSIONAL CONSULTING SERVICES FOR THE PREPARATION OF  
REQUIREMENTS FOR THE PROCUREMENT OF ENTERPRISE PROJECT  
MANAGEMENT SOFTWARE**

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## **PART B - BIDDING PROCEDURES**

### **B1. CONTRACT TITLE**

B1.1 PROFESSIONAL CONSULTING SERVICES FOR PROCUREMENT OF ENTERPRISE PROJECT MANAGEMENT SOFTWARE

### **B2. SUBMISSION DEADLINE**

B2.1 The Submission Deadline is 12:00 noon Winnipeg time, May 4, 2026.

B2.2 The Consulting Contract Administrator or the Manager of Purchasing may extend the Submission Deadline by issuing an addendum at any time prior to the time and date specified in B2.1.

### **B3. ENQUIRIES**

B3.1 All enquiries shall be directed to the Consulting Contract Administrator identified in D2.

B3.2 If the Proponent finds errors, discrepancies or omissions in the Request for Proposal, or is unsure of the meaning or intent of any provision therein, the Proponent shall promptly notify the Consulting Contract Administrator of the error, discrepancy or omission at least five (5) Business Days prior to the Submission Deadline.

B3.3 Responses to enquiries which, in the sole judgment of the Consulting Contract Administrator, require a correction to or a clarification of the Request for Proposal will be provided by the Consulting Contract Administrator to all Proponents by issuing an addendum.

B3.4 Responses to enquiries which, in the sole judgment of the Consulting Contract Administrator, do not require a correction to or a clarification of the Request for Proposal will be provided by the Consulting Contract Administrator only to the Proponent who made the enquiry.

B3.5 All correspondence or contact by Proponents with the City in respect of this RFP must be directly and only with the City's Consulting Contract Administrator. Failure to restrict correspondence and contact to the Consulting Contract Administrator may result in the rejection of the Proponents Proposal Submission.

B3.6 The Proponent shall not be entitled to rely on any response or interpretation received pursuant to B3 unless that response or interpretation is provided by the Consulting Contract Administrator in writing.

B3.7 Any enquiries concerning submitting through MERX should be addressed to:  
MERX Customer Support  
Phone: 1-800-964-6379  
Email: merx@merx.com

### **B4. CONFIDENTIALITY**

B4.1 Information provided to a Proponent by the City or acquired by a Proponent by way of further enquiries or through investigation is confidential. Such information shall not be used or disclosed in any way without the prior written authorization of the Consulting Contract Administrator. The use and disclosure of the Confidential Information shall not apply to information which:

- (a) was known to the Proponent before receipt hereof; or
- (b) becomes publicly known other than through the Proponent; or
- (c) is disclosed pursuant to the requirements of a governmental authority or judicial order.

B4.2 The Proponent shall not make any statement of fact or opinion regarding any aspect of the Request for Proposals to the media or any member of the public without the prior written authorization of the Consulting Contract Administrator.

## **B5. ADDENDA**

B5.1 The Consulting Contract Administrator may, at any time prior to the Submission Deadline, issue addenda correcting errors, discrepancies or omissions in the Request for Proposal, or clarifying the meaning or intent of any provision therein.

B5.2 The Consulting Contract Administrator will issue each addendum at least two (2) Business Days prior to the Submission Deadline, or provide at least two (2) Business Days by extending the Submission Deadline.

B5.3 Addenda will be available on the MERX website at [www.merx.com](http://www.merx.com).

B5.4 The Proponent is responsible for ensuring that they have received all addenda and is advised to check the MERX website for addenda regularly and shortly before the Submission Deadline, as may be amended by addendum.

B5.5 The Proponent shall acknowledge receipt of each addendum in Paragraph 10 of Form A: Bid/Proposal. Failure to acknowledge receipt of an addendum may render a Proposal non-responsive.

B5.6 Notwithstanding B3, enquiries related to an Addendum may be directed to the Consulting Contract Administrator indicated in D2.

## **B6. PROPOSAL SUBMISSION**

B6.1 The Proposal shall consist of the following components:

- (a) Form A: Bid/Proposal (Section A) in accordance with B7;
- (b) Fees (Section B) in accordance with B8.

B6.2 The Proposal should also consist of the following components:

- (a) Experience of Proponent and Subconsultants (Section C) in accordance with B17.1(d);
- (b) Experience of Key Personnel Assigned to the Project (Section D), in accordance with B17.1(e);
- (c) Project Understanding and Methodology (Section E) in accordance with B17.1(f); and
- (d) Project Schedule (Section F) in accordance with B17.1(g).

B6.3 Further to B6.1 all components of the Proposal shall be fully completed or provided in the order indicated, and submitted by the Proponent no later than the Submission Deadline, with all required entries made clearly and completely, to constitute a responsive Proposal.

B6.4 Further to B6.2, all components of the Proposal should be fully completed or provided in the order indicated, and submitted by the Proponent no later than the Submission Deadline, with all required entries made clearly and completely.

B6.5 Proposal format, including number of pages, size of pages and font, etc., will not be regulated, except that the Proposal should contain a table of contents, page numbering and should be in the Sections identified above. Proponents are encouraged to use their creativity to submit a Proposal which provides the requested information for evaluation and other information which illustrates the strength of their proposed solution.

B6.6 The Proposal shall be submitted electronically through MERX at [www.merx.com](http://www.merx.com).

B6.6.1 Proposals will **only** be accepted electronically through MERX.

B6.7 Proponents are advised that inclusion of terms and conditions inconsistent with the Request for Proposal, will be evaluated in accordance with B17.2.

B6.8 Any cost or expense incurred by the Proponent that is associated with the preparation of the Proposal shall be borne solely by the Proponent.

**B7. PROPOSAL (SECTION A)**

B7.1 The Proponent shall complete Form A: Bid/Proposal, making all required entries.

B7.2 Paragraph 2 of Form A: Bid/Proposal shall be completed in accordance with the following requirements:

- (a) if the Proponent is a sole proprietor carrying on business in their own name, their name shall be inserted;
- (b) if the Proponent is a partnership, the full name of the partnership shall be inserted;
- (c) if the Proponent is a corporation, the full name of the corporation shall be inserted;
- (d) if the Proponent is carrying on business under a name other than their own, the business name and the name of every partner or corporation who is the owner of such business name shall be inserted.

B7.2.1 If a Proposal is submitted jointly by two or more persons, each and all such persons shall identify themselves in accordance with B7.2.

B7.3 In Paragraph 3 of Form A: Bid/Proposal, the Proponent shall identify a contact person who is authorized to represent the Proponent for purposes of the Proposal.

B7.4 Paragraph 13 of Form A: Bid/Proposal shall be signed in accordance with the following requirements:

- (a) if the Proponent is a sole proprietor carrying on business in their own name, it shall be signed by the Proponent;
- (b) if the Proponent is a partnership, it shall be signed by the partner or partners who have authority to sign for the partnership;
- (c) if the Proponent is a corporation, it shall be signed by their duly authorized officer or officers;
- (d) if the Proponent is carrying on business under a name other than their own, it shall be signed by the registered owner of the business name, or by the registered owner's authorized officials if the owner is a partnership or a corporation.

B7.4.1 The name and official capacity of all individuals signing Form A: Bid/Proposal should be entered below such signatures.

B7.5 If a Proposal is submitted jointly by two or more persons, the word "Proponent" shall mean each and all such persons, and the undertakings, covenants and obligations of such joint Proponents in the Proposal and the Contract, when awarded, shall be both joint and several.

**B8. FEES (SECTION B)**

B8.1 The Proposal shall include a Fixed Fee for all disciplines and/or phases identified in D4 Scope of Services.

B8.2 Adjustments to Fees will only be considered based on increases to the Scope of Services.

B8.2.1 The City will not consider an adjustment to the Fees based on changes in the Project budget or the Final Total Construction Cost.

- B8.3 Notwithstanding C1.1(b), Fees shall include costs for out of town travel, related meals and accommodations for the duration of the Project and shall not be considered an Allowable Disbursement.
- B8.4 Notwithstanding C11.1, Fees submitted shall not include the Goods and Services Tax (GST) or Manitoba Retail Sales Tax (MRST, also known as PST), which shall be extra where applicable.
- B8.5 Payments to Non-Resident Consultants are subject to Non-Resident Withholding Tax pursuant to the Income Tax Act (Canada).  
Fees stated shall not include any costs which may be incurred by the Consultant with respect to any applicable funding agreement obligations as outlined in D20. Any such costs shall be determined in accordance with D20.

## **B9. DISCLOSURE**

- B9.1 Various Persons provided information or services with respect to this RFP. In the City's opinion, this relationship or association does not create a conflict of interest because of this full disclosure. Where applicable, additional material available as a result of contact with these Persons is listed below.
- B9.2 The Persons are:  
(a) N/A

## **B10. CONFLICT OF INTEREST AND GOOD FAITH**

- B10.1 Further to C3.2, Proponents, by responding to this RFP, declare that no Conflict of Interest currently exists, or is reasonably expected to exist in the future.
- B10.2 Conflict of Interest means any situation or circumstance where a Proponent or Key Personnel proposed for the Services has:  
(a) other commitments;  
(b) relationships;  
(c) financial interests; or  
(d) involvement in ongoing litigation;  
that could or would be seen to:  
(i) exercise an improper influence over the objective, unbiased and impartial exercise of the independent judgment of the City with respect to the evaluation of Proposals or award of the Contract; or  
(ii) compromise, impair or be incompatible with the effective performance of a Proponent's obligations under the Contract;  
(e) has contractual or other obligations to the City that could or would be seen to have been compromised or impaired as a result of their participation in the RFP process or the Project;  
or  
(f) has knowledge of confidential information (other than confidential information disclosed by the City in the normal course of the RFP process) of strategic and/or material relevance to the RFP process or to the Project that is not available to other Proponents and that could or would be seen to give that Proponent an unfair competitive advantage.
- B10.3 In connection with their Proposal, each entity identified in B10.2 shall:  
(a) avoid any perceived, potential or actual Conflict of Interest in relation to the procurement process and the Project;  
(b) upon discovering any perceived, potential or actual Conflict of Interest at any time during the RFP process, promptly disclose a detailed description of the Conflict of Interest to the City in a written statement to the Consulting Contract Administrator; and

- (c) provide the City with the proposed means to avoid or mitigate, to the greatest extent practicable, any perceived, potential or actual Conflict of Interest and shall submit any additional information to the City that the City considers necessary to properly assess the perceived, potential or actual Conflict of Interest.
- B10.4 Without limiting B10.3, the City may, in their sole discretion, waive any and all perceived, potential or actual Conflicts of Interest. The City's waiver may be based upon such terms and conditions as the City, in their sole discretion, requires to satisfy itself that the Conflict of Interest has been appropriately avoided or mitigated, including requiring the Proponent to put into place such policies, procedures, measures and other safeguards as may be required by and be acceptable to the City, in their sole discretion, to avoid or mitigate the impact of such Conflict of Interest.
- B10.5 Without limiting B10.3, and in addition to all contractual or other rights or rights at law or in equity or legislation that may be available to the City, the City may, in their sole discretion:
- (a) disqualify a Proponent that fails to disclose a perceived, potential or actual Conflict of Interest of the Proponent or any of their Key Personnel;
  - (b) require the removal or replacement of any Key Personnel proposed for the Services that has a perceived, actual or potential Conflict of Interest that the City, in their sole discretion, determines cannot be avoided or mitigated;
  - (c) disqualify a Proponent or Key Personnel proposed for the Services that fails to comply with any requirements prescribed by the City pursuant to B10.4 to avoid or mitigate a Conflict of Interest; and
  - (d) disqualify a Proponent if the Proponent, or one of their Key Personnel proposed for the Project, has a perceived, potential or actual Conflict of Interest that, in the City's sole discretion, cannot be avoided or mitigated, or otherwise resolved.
- B10.6 The final determination of whether a perceived, potential or actual Conflict of Interest exists shall be made by the City, in their sole discretion.

## **B11. QUALIFICATION**

- B11.1 The Proponent shall:
- (a) undertake to be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Proponent does not carry on business in Manitoba, in the jurisdiction where the Proponent does carry on business; and
  - (b) be financially capable of carrying out the terms of the Contract;
  - (c) have all the necessary experience, capital, organization, and equipment to perform the Services in strict accordance with the terms and provisions of the Contract;
- B11.2 The Proponent and any proposed Subconsultant (for the portion of the Services proposed to be subcontracted to them) shall:
- (a) be responsible and not be suspended, debarred or in default of any obligations to the City. A list of suspended or debarred individuals and companies is available on the Information Connection page at The City of Winnipeg, Corporate Finance, Purchasing Division website at <https://winnipeg.ca/finance/findata/matmgt/listing/debar.pdf>
- B11.3 The Proponent and/or any proposed Subconsultant (for the portion of the Services proposed to be subcontracted to them) shall:
- (a) have successfully carried out services for the planning, interviewing, analyzing, and contract administration for consulting projects of similar complexity, scope and value; and to those required for this Project; and

- (b) be fully capable of performing the Services required to be in strict accordance with the terms and provisions of the Contract;
- (c) have a written workplace safety and health program, if required, pursuant to The Workplace Safety and Health Act (Manitoba);
- (d) have the knowledge and resources to administer the requirements of The Workplace Safety and Health Act (Manitoba) during the construction works associated with this Contract;
- (e) undertake to meet all licensing and regulatory requirements of the appropriate governing authorities and associations in the Province of Manitoba; and
- (f) have completed the Accessible Customer Service online training required by the Accessibility for Manitobans Act (AMA) (see B11.4 and D6).  
upon request of the Consulting Contract Administrator, provide the Security Clearances as identified in PART E - ; and
- (h) Have read and understood the City's Project Management Manual (<https://legacy.winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#3>); and
- (i) At least one member of the project delivery team be PMP certified and familiar with Project Management principles.

B11.4 Further to B11.3(f), the Proponent acknowledges that they and all Subconsultants have obtained training required by the Accessibility for Manitobans Act (AMA) available at <https://accessibilitymb.ca/resources-events-and-training/online-training.html> for anyone that may have any interaction with the public on behalf of the City of Winnipeg.

B11.5 The Proponent shall submit, within three (3) Business Days of a request by the Consulting Contract Administrator, further proof satisfactory to the Consulting Contract Administrator of the qualifications of the Proponent and of any proposed Subconsultant.

B11.6 The Proponent shall provide, on the request of the Consulting Contract Administrator, full access to any of the Proponent's equipment and facilities to confirm, to the Consulting Contract Administrator's satisfaction, that the Proponent's equipment and facilities are adequate to perform the Services.

## **B12. OPENING OF PROPOSALS AND RELEASE OF INFORMATION**

B12.1 Proposals will not be opened publicly.

B12.2 After award of Contract, the Contract amount and the name of the successful Proponent and their address will be available on the MERX website at [www.merx.com](http://www.merx.com).

B12.3 The Proponent is advised any information contained in any Proposal Submission may be released if required by The Freedom of Information and Protection of Privacy Act (Manitoba), by other authorities having jurisdiction, or by law or by City policy or procedures (which may include access by members of City Council).

B12.3.1 To the extent permitted, the City shall treat as confidential information, those aspects of a Proposal Submission identified by the Proponent as such in accordance with and by reference to Part 2, Section 17 or Section 18 or Section 26 of The Freedom of Information and Protection of Privacy Act (Manitoba), as amended.

## **B13. IRREVOCABLE OFFER**

B13.1 The Proposal(s) submitted by the Proponent shall be irrevocable for the time period specified in Paragraph 11 of Form A: Bid/Proposal.

B13.2 The acceptance by the City of any Proposal shall not release the Proposals of the other responsive Proponents and these Proponents shall be bound by their offers on such Services for the time period specified in Paragraph 11 of Form A: Bid/Proposal.

**B14. WITHDRAWAL OF OFFERS**

B14.1 A Proponent may withdraw their Proposal without penalty prior to the Submission Deadline.

**B15. INTERVIEWS**

B15.1 The Consulting Contract Administrator may, in their sole discretion, interview Proponents during the evaluation process.

**B16. NEGOTIATIONS**

B16.1 The City reserves the right to negotiate details of the Contract with any Proponent. Proponents are advised to present their best offer, not a starting point for negotiations in their Proposal Submission.

B16.2 The City may negotiate with the Proponents submitting, in the City's opinion, the most advantageous Proposals. The City may enter into negotiations with one or more Proponents without being obligated to offer the same opportunity to any other Proponents. Negotiations may be concurrent and will involve each Proponent individually. The City shall incur no liability to any Proponent as a result of such negotiations.

B16.3 If, in the course of negotiations pursuant to B16.2, the Proponent amends or modifies a Proposal after the Submission Deadline, the City may consider the amended Proposal as an alternative to the Proposal already submitted without releasing the Proponent from the Proposal as originally submitted.

**B17. EVALUATION OF PROPOSALS**

B17.1 Award of the Contract shall be based on the following evaluation criteria:

<b>EVALUATION CATEGORY</b>	<b>WEIGHTING (%)</b>
(a) Compliance by the Proponent with the requirements of the Request for Proposal or acceptable deviation therefrom;	<b>Pass/Fail</b>
(b) Qualifications of the Proponent and the Subconsultants, if any, pursuant to B17;	<b>Pass/Fail</b>
(c) Fees; (Section B)	20
<b>(d) Experience of Proponent and Subconsultants; (Section C) - 10% Total</b>	
(i) details demonstrating the history and experience of the Proponent and Subconsultants on advisory engagements involving capital project process assessment service for two projects of similar complexity, scope and value.	
(ii) general profile information, including years in business, average volume of work, number of employees and other pertinent information for the Proponent and all Subconsultants.	4
(iii) For each project listed in B17.1(d)(i):	
(i) description of each project;	1
(ii) role of the consultant;	1
(iii) project's original contracted cost and final cost;	1

(iv)	design and schedule (anticipated Project schedule and actual project delivery schedule, showing design separately);	1
(v)	project owner;	1
(vi)	reference information (one current name with telephone number and email addresses per project);	1
Note: Where applicable, Proposal should be separated into Proponent and Subconsultant project listings		
<b>(e) Experience of Key Personnel Assigned to the Project; (Section D) -20% Total</b>		
(i)	Describe your approach to overall team formation and coordination of team members.	
(ii)	experience and qualifications of the Key Personnel assigned to the Project for projects of similar complexity, scope and value, including the principals-in-charge, lead analysts, subject matter leads and other key resources. Include educational background and degrees, professional recognition, job title, years of experience in current position, years of experience in design and years of experience with existing employer. Roles of each of the Key Personnel in the Project should be identified in the organizational chart.	10
(iii)	for each person identified, list at least two comparable projects in which they have played a primary role similar to that proposed for this Project. If a project selected for a key person is included in B17.1(d), provide only the project name and the role of the key person. For other projects provide the following:	
(iv)	description of project;	4
(v)	role of the person;	2
(vi)	project Owner;	2
(vii)	reference information (two current names with telephone numbers and email addresses per project.)	2
<b>(f) Project Understanding and Methodology (Section E) – 40% Total</b>		
(i)	Describe your firm’s project management approach and team organization during the performance of Services, methods the Proponent will use in the delivery of this Project.	3
(ii)	Include an organization chart for the Project.	5
(iii)	Identify the Key Personnel e.g. Project Manager, Business Analyst, assigned to the Project. Indicate which Key Personnel have PMP certification.	5
(iv)	methodology presented in accordance with the Scope of Services.	3
(v)	description of the collaborative process/method to be used by the Key Personnel of the team in the various phases of the Project.	4
(vi)	team’s understanding of the broad functional and technical requirements.	10
(vii)	the proposed Project budget.	4
(viii)	the Project methodology with respect to the information provided within this RFP and the City’s Project Management Manual at <a href="http://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#2">http://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#2</a> and templates at <a href="http://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#4">http://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#4</a> .	4
(ix)	any other issue that conveys your team’s understanding of the Project requirements.	2

<b>(g) Project Schedule. (Section F) – 10% Total</b>	
(i) Present carefully considered Critical Path Method schedule using Microsoft Project or similar project management software, complete with resource assignments, durations (weekly timescale) and milestone dates or events. The schedule should address each requirement of the Scope of Services.	5
(ii) The Proponent's schedule should include critical dates for review and approval processes by the City and other organizations anticipated during the design and tendering phases of the Project. Reasonable times should be allowed for completion of these processes.	5

- B17.2 Further to B17.1(a), the Award Authority may reject a Proposal as being non-responsive if the Proposal Submission is incomplete, obscure or conditional, or contains additions, deletions, alterations or other irregularities. The Award Authority may reject all or any part of any Proposal, or waive technical requirements or minor informalities or irregularities if the interests of the City so require.
- B17.3 Further to B17.1(b), the Award Authority shall reject any Proposal submitted by a Proponent who does not demonstrate, in their Proposal or in other information required to be submitted, that it is qualified.
- B17.4 If, in the sole opinion of the City, a Proposal does not achieve a pass rating for B17.1(a) and B17.1(b), the Proposal will be determined to be non-responsive and will not be further evaluated.
- B17.5 Further to B17.1(c), Fees will be evaluated based on Fees submitted in accordance with B8.
- B17.5.1 For evaluation purposes only, where Fees include a cash allowance, the cash allowance shall be removed from the total Fees for the calculation of price points
- B17.6 Further to B17.1(c), the Award Authority may reject a Proposal as being non-responsive if it exceeds the funds available as shown in D4.2.
- B17.7 Further to B17.1(d), Experience of Proponent and Subconsultants will be evaluated considering the experience of the organization on projects of similar size.
- B17.8 Further to B17.1(e), Experience of Key Personnel Assigned to the Project will be evaluated considering the experience and qualifications of the Key Personnel and Subconsultant personnel on Projects of comparable size and complexity.
- B17.9 Further to B17.1(f), Project Understanding and Methodology will be evaluated considering your firm's understanding of the City's Project, project management approach and team organization.
- B17.10 Further to B17.1(g), Project Schedule will be evaluated considering the Proponent's ability to comply with the requirements of the Project.
- B17.11 Notwithstanding B17.1(d) to B17.1(g), where Proponents fail to provide a response to B6.2(a) to B6.2(d), the score of zero may be assigned to the incomplete part of the response.
- B17.12 Proposals will be evaluated considering the information in the Proposal Submission and any interviews held in accordance with B15.
- B17.13 Where references are requested, the reference checks to confirm information provided may not be restricted to only those submitted by the Proponent, and may include organizations representing Persons, known to have done business with the Proponent.

**B18. AWARD OF CONTRACT**

- B18.1 The City will give notice of the award of the Contract, or will give notice that no award will be made.
- B18.2 The City will have no obligation to award a Contract to a Proponent, even though one or all of the Proponents are determined to be qualified, and the Proposals are determined to be responsive.
- B18.2.1 Without limiting the generality of B18.2, the City will have no obligation to award a Contract where:
- (a) the prices exceed the available City funds for the Services;
  - (b) the prices are materially in excess of the prices received for similar services in the past;
  - (c) the prices are materially in excess of the City's cost to perform the Services, or a significant portion thereof, with their own forces;
  - (d) only one Proposal is received; or
  - (e) in the judgment of the Award Authority, the interests of the City would best be served by not awarding a Contract.
- B18.3 Where an award of Contract is made by the City, the award shall be made to the qualified Proponent submitting the most advantageous offer.
- B18.4 The City may, at their discretion, award the Contract in phases.
- B18.5 Further to Paragraph 7 of Form A: Bid/Proposal and C4, the City may issue an award letter to the successful Proponent in lieu of execution of Contract Documents
- B18.5.1 The Contract documents as defined in C1.1(u) in their entirety shall be deemed to be incorporated in and to form a part of the award letter notwithstanding that they are not necessarily attached to or accompany said award letter
- B18.6 The form of Contract with the City of Winnipeg will be based on the Contract as defined in C1.1(v).
- B18.7 Following the award of Contract, a Proponent will be provided with information related to the evaluation of their Proposal upon written request to the Consulting Contract Administrator.
- B18.8 If, after the award of Contract, the Project is cancelled, the City reserves the right to terminate the Contract. The Proponent will be paid for all Services rendered up to time of termination.

## **PART C - GENERAL CONDITIONS**

### **C0. GENERAL CONDITIONS**

- C0.1 The *General Conditions for Consultant Services* (Revision 2022-09-02) are applicable to the Services of the Contract.
- C0.1.1 The *General Conditions for Consultant Services* are available on the Information Connection page at The City of Winnipeg, Corporate Finance, Purchasing Division website at [http://www.winnipeg.ca/matmgt/gen\\_cond.stm](http://www.winnipeg.ca/matmgt/gen_cond.stm).
- C0.2 A reference in the Request for Proposal to a section, clause or subclause with the prefix “**C**” designates a section, clause or subclause in the *General Conditions for Consultant Services*.

## **PART D - SUPPLEMENTAL CONDITIONS**

### **GENERAL**

#### **D1. GENERAL CONDITIONS**

D1.1 In addition to the *General Conditions for Consultant Services*, these Supplemental Conditions are applicable to the Services of the Contract.

#### **D2. CONSULTING CONTRACT ADMINISTRATOR**

D2.1 The Consulting Contract Administrator is:

Andrew Burton

Telephone No. 204 391-0049

Email Address: aburton@winnipeg.ca

D2.2 At the pre-commencement meeting, the Consulting Contract Administrator will identify additional personnel representing the Consulting Contract Administrator and their respective roles and responsibilities for the Services.

#### **D3. BACKGROUND**

D3.1 Capital projects and programs cut across a wide range of City service areas, reflecting the diverse and evolving needs of the community. These projects span infrastructure development, public safety, environmental sustainability, transportation, community services, and digital modernization, and run from \$100,000 to over \$1 billion. For example, capital investments may include the rehabilitation and expansion of pathways, roads and bridges, upgrades to water and wastewater infrastructure, renewal of park amenities, enhancements to public transit systems, modernization of recreation facilities, the construction of libraries and community centers, and the implementation of new technology platforms to support service delivery.

D3.2 The 2009 Capital Project audit identified the need for a formal project management approach at the City of Winnipeg. In response to this and as part of its Asset Management Program, the City developed a Project Management Manual that provided a framework for managing projects. However, project management practices remain inconsistent across departments due to the absence of a unified enterprise solution for tracking and reporting projects from initiation through to closeout. Although various tools are used to capture project details such as expenditures, status, and progress, financial data is ultimately recorded in PeopleSoft, requiring reliance on manual effort in getting capital portfolio details. This fragmented approach often result in discrepancies and misinterpretations, which hinder effective decision-making, particularly for large-scale capital projects that span multiple years.

D3.3 Departments have voiced concerns about the challenges this creates. Senior leadership rely on timely, accurate project updates to make informed, transparent decisions. Without the right tools, project data is collected manually and shared in inconsistent formats. This slows down planning, introduces errors, and leads to reporting gaps and budget misalignments.

D3.4 Specifically, construction projects involve partnering with external parties such as contractors, engineers, utilities, builders, etc., due to the lack of a centralized system to effectively coordinate with these external service providers, projects may be delayed and/or misaligned.

D3.5 Without a centralized, automated system to track project progress and costs in real time, the City continues to face challenges such as poor communication, delays in accessing reliable information, inefficient resource use, and limited visibility into project performance. These issues contribute to the potential for missed deadlines, budget overruns, and a loss of trust from stakeholders.

D3.6 In summary, the major problems of capital projects include:

- (a) Inaccurate or inconsistent document management processes across departments.
- (b) Weak coordination with utilities and partner agencies.
- (c) No consistency in methods and tools for capturing and tracking capital portfolio information.
- (d) Outdated tools for managing risks, reporting, and project documentation.

D3.7 Ultimately, the goal is to attain city-wide capability enhancement in Project and Portfolio Management. This will be achieved by procuring a new, Enterprise Project and Portfolio Management (EPPM) system to align our processes and resources optimally, thereby fostering strategic planning and effective execution throughout the organization.

#### **D4. SCOPE OF SERVICES**

D4.1 The Services required under this Contract shall consist of consulting with key stakeholders across departments, assessing project management maturity levels, and developing vendor-neutral, procurement-ready requirements and supporting materials for a future negotiated request for proposal (NRFP) for an Enterprise Project and Portfolio Management (EPPM) solution as follows:

- (a) A current-state assessment of capital-funded project management practices across the City of Winnipeg (including major, regular, and program capital projects), covering project types, delivery models, roles, and variability by department/agency, limited to capital-funded projects and related portfolio reporting requirements;
- (b) An assessment of project management maturity level and the level of awareness of, and compliance with, the City of Winnipeg Project Management Manual and other department/subject-area guidance (including identification of gaps and improvement opportunities) by department/agency;
- (c) An inventory and assessment of the software tools and supporting artifacts currently used for capital project management (e.g., scheduling, cost tracking, reporting, document management), including how tools are used, pain points, and duplications by department/agency;
- (d) A vendor-neutral set of recommendations and NRFP-ready requirements to support procurement of an EPPM software solution and implementation services for capital projects city-wide (scope definition, functional and non-functional requirements, integration needs, data/security considerations, and evaluation framework), distinguishing between issues addressable through process, governance, training, data standards and organizational change, versus those requiring software capability;
- (e) The Consultant's role with respect to the NRFP process, evaluation approach, and template documents shall be advisory only. Final approval and use of procurement methodology, evaluation criteria, weighting, and template language remain the responsibility of the City;

D4.1.1 The City of Winnipeg is seeking the following Professional Services:

- (a) Review the City of Winnipeg Project Management Manual, City-wide standards, and department-/subject-area-specific capital project management documentation (templates, procedures, governance artifacts) to understand the City's current capital project management landscape;
- (b) Plan and conduct stakeholder engagement (interviews and/or workshops) with SMEs, project sponsors, project managers, finance stakeholders, asset management, IT, and other key stakeholders across departments/crown corporations/agencies involved in capital project delivery, and where approved by the City, selected external stakeholder groups relevant to capital project delivery, contract administration, and utility/service coordination, including the following:
  - (i) Public Works
  - (ii) Water and Waste

- (iii) Innovation & Technology
  - (iv) Assets and Project Management
  - (v) Transit
  - (vi) Community Services
  - (vii) Assessment and Taxation
  - (viii) Winnipeg Fire and Paramedic Services
  - (ix) Association of Consulting Engineers Manitoba
  - (x) Manitoba Heavy Construction Association
  - (xi) Winnipeg Construction Association
  - (xii) Utilities and other service providers;
- (c) Facilitate requirements definition and prioritization for a future EPPM tool focused on capital projects, including integration considerations (Microsoft 365/SharePoint/Teams and PeopleSoft; Esri), assessing deployment model considerations, including SaaS, hosted, and other feasible options, with SaaS to be considered where it aligns with the City's security, privacy, integration, records management, and operational requirements, including document, records, retention, access control, and auditability requirements relevant to capital project information;
- (d) Review and understand the City of Winnipeg's NRFP process and template documents and produce deliverables (D4.1.3) suitable for re-use in a subsequent NRFP for the EPPM software and implementation (requirements catalogue, use cases, recommended evaluation framework, and phased implementation/Organizational Change Management (OCM) roadmap), and preliminary total cost of ownership model within an anticipated 26 week engagement;
- (e) Bring to the Consulting Contract Administrator's attention any aspect of the City's NRFP process or NRFP template documents which may require modification in accordance with the Consultant's understanding of the City of Winnipeg requirements and the industry;
- (f) Conduct a cross-jurisdictional benchmarking scan of comparable municipalities and public-sector organizations using owner-oriented EPPM software to manage high-volume, high-diversity project portfolios, documenting lessons learned, implementation issues, mitigation strategies relevant to procurement, rollout, governance and organizational change management, including:
- (i) Tier 1 "Generalists" such as mid- to large-sized cities with diverse project portfolios delivered across multiple departments;
  - (ii) Tier 2 "Specialists" such as large transportation agencies, utilities, or other infrastructure-intensive public-sector organizations;

D4.1.2 The requirements (D4.1.3) definition and prioritization should include but not be limited to the following considerations:

- (a) Document the current software features for each department and their relevant divisions: what data is recorded, what reporting is available, what features are available, what integrations are required
- (b) Document deficiencies and unmet needs in the current project management software and related tools
- (c) Score Project Management requirements and reporting metric requirements using factors such as strategic importance, risk / compliance impact, frequency of use, cross-department applicability, portfolio size, service criticality, implementation complexity
- (d) Amalgamate and rank functional and non-functional requirements into a prioritized requirements catalogue, including identification of mandatory, rated, optional, and future-phase requirements, and create a feature priority matrix suitable for reuse in the NRFP

- (e) Assessing and identify requirements that are common or core enterprise requirements, versus tiered or conditional requirements based on the project size, risk, complexity or delivery model
- (f) Assess and identify requirements for how external parties, including consultant service providers, contract administrators, contractors, utilities, and partner agencies, may interface with the future EPPM solution, including collaboration models, document exchange, workflow participation, access/security roles, permissions, auditability, and interoperability considerations
- (g) Assess and identify requirements and decision points related to contract administration processes during project execution, including whether such processes are to be managed within the future EPPM solution, integrated through external systems or service providers, or maintained outside the solution with defined handoff, document, and update requirements
- (h) Define future-state functional and technical requirements to support project closeout and downstream handoff of relevant project, asset, and capital program information for asset management purposes, including consideration of a project-to-asset closeout workflow
- (i) Define project cost management and financial integration requirements for the future EPPM solution, including actuals, commitments, accruals, forecasting, estimate at completion, trend analysis, burn rates, contingency management, program-level roll-up, and assessment of one-way and two-way integration options with PeopleSoft and related financial processes

D4.1.3 The complete list of expected deliverables is as follows:

- (a) current-state assessment report
- (b) maturity assessment report
- (c) tool inventory and gap analysis
- (d) requirements catalogue, including prioritized requirements and feature priority matrix
- (e) vendor neutral recommendations
- (f) reporting requirements
- (g) use cases
- (h) integration requirements
- (i) recommended evaluation framework
- (j) optional advisory memorandum on recommended NRFP template/process refinements per D4.1.1(e)
- (k) cross-jurisdictional benchmarking summary and lessons-learned risk register
- (l) preliminary 10-year total cost of ownership model for the future EPPM solution, based on defined assumptions for licensing, implementation, integration, support, training, administration, and ongoing operating costs
- (m) phased implementation roadmap
- (n) OCM roadmap
- (o) final executive summary / presentation

D4.1.4 The successful Proponent under this Contract shall not be eligible to bid or participate in any manner whatsoever as a participant or advisor to any proponent participating on the subsequent NRFP of this project.

D4.1.5 The Services required under D4.1.1, D4.1.2 and D4.1.3 shall be in accordance with the City's Project Management Manual <https://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#3> and templates <http://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#4> . Notwithstanding the foregoing, the

Consultant is being engaged by the City for their professional expertise; the Consultant shall bring to the Consulting Contract Administrator's attention any aspect of the City's Project Management Manual or templates which the Consultant is of the opinion is not consistent with Good Industry Practice.

Where the Services required include Contract Administration, Consultants shall pay particular attention to the revisions to Section 9.19 and 9.20.1 of the City's Project Management Manual in Addendum #8.

<https://winnipeg.ca/infrastructure/asset-management-program/templates-manuals.stm#3>

D4.2 The funds available for this Contract are \$300,000.

## D5. DEFINITIONS

D5.1 When used in this Request for Proposal:

- (a) **"Artificial intelligence"** or **"AI"** means a machine-based system that can, for a given set of human-defined objectives, make predictions, recommendations or decisions influencing real or virtual environments. Artificial intelligence systems use machine and human-based inputs to:
  - (i) perceive real and virtual environments;
  - (ii) abstract such perceptions into models through analysis in an automated manner; and
  - (iii) use model inference to formulate options for information or action.
- (b) **"EPPM"** means Enterprise Project and Portfolio Management Software, indicating software as a service suitable for large scale capital project and portfolio management, including reporting, scheduling, charting, etc.
- (c) **"NRFP"** means Negotiated Request for Proposal,
- (d) **"Supply Chain Disruption"** means an inability by the Consultant to obtain goods or services from third parties necessary to perform the Work of the Contract within the schedule specified therein, despite the Consultant making all reasonable commercial efforts to procure same. Consultant are advised that increased costs do not, in and of themselves, amount to a Supply Chain Disruption;

## D6. ACCESSIBLE CUSTOMER SERVICE REQUIREMENTS

D6.1 The Accessibility for Manitobans Act (AMA) imposes obligations on The City of Winnipeg to provide accessible customer service to all persons in accordance with the Customer Service Standard Regulation ("CSSR") to ensure inclusive access and participation for all people who live, work or visit Winnipeg regardless of their abilities.

D6.1.1 The Consultant agrees to comply with the accessible customer service obligations under the CSSR and further agrees that when providing the Goods or Services or otherwise acting on the City of Winnipeg's behalf, shall comply with all obligations under the AMA applicable to public sector bodies.

D6.1.2 The accessible customer service obligations include, but are not limited to:

- (a) providing barrier-free access to goods and services;
- (b) providing reasonable accommodations;
- (c) reasonably accommodating assistive devices, support persons, and support animals;
- (d) providing accessibility features e.g. ramps, wide aisles, accessible washrooms, power doors and elevators;
- (e) inform the public when accessibility features are not available;
- (f) providing a mechanism or process for receiving and responding to public feedback on the accessibility of all goods and services; and

(g) providing adequate training of staff and documentation of same.

#### **D7. SUPPLIER CODE OF CONDUCT**

- D7.1 The Consultant has reviewed and understands the City's Supplier Code of Conduct. This document is located at: <https://www.winnipeg.ca/media/4891>
- D7.2 The Consultant agrees to comply with the Supplier Code of Conduct as it may be amended or replaced from time to time. The Consultant is responsible for periodically checking the above link for updates to the Supplier Code of Conduct. Contract signature on Form A: Bid/Proposal from the Consultant signifies agreement to the Supplier Code of Conduct which comes into effect once the Contract starts.
- D7.3 If there is a conflict between the Contract and the Supplier Code of Conduct – the Contract will prevail.

#### **D8. UNFAIR LABOUR PRACTICES**

- D8.1 Further to C3.2, the Consultant declares that in bidding for the Work and in entering into this Contract, the Consultant and any proposed Subconsultant(s) conduct their respective business in accordance with established international codes embodied in United Nations Universal Declaration of Human Rights (UDHR) <https://www.un.org/en/about-us/universal-declaration-of-human-rights> International Labour Organization (ILO) <https://www.ilo.org/global/lang--en/index.htm> conventions as ratified by Canada.
- D8.2 The City of Winnipeg is committed and requires its Consultants and their Subconsultants, to be committed to upholding and promoting international human and labour rights, including fundamental principles and rights at work covered by ILO eight (8) fundamental conventions and the United Nations Universal Declaration of Human Rights which includes child and forced labour.
- D8.3 Upon request from the Consulting Contract Administrator, the Consultant shall provide disclosure of the sources (by company and country) of the raw materials used in the Work and a description of the manufacturing environment or processes (labour unions, minimum wages, safety, etc.).
- D8.4 Failure to provide the evidence required under D8.3, may be determined to be an event of default in accordance with C14.
- D8.5 In the event that the City, in its sole discretion, determines the Consultant to have violated the requirements of this section, it will be considered a fundamental breach of the Contract and the Consultant shall pay to the City a sum specified by the Consulting Contract Administrator in writing ("Unfair Labour Practice Penalty"). Such a violation shall also be considered an Event of Default, and shall entitle the City to pursue all other remedies it is entitled to in connection with same pursuant to the Contract.
- D8.5.1 The Unfair Labour Practice Penalty shall be such a sum as determined appropriate by the City, having due regard to the gravity of the Consultant's violation of the above requirements, any cost of obtaining replacement goods/ services or rectification of the breach, and the impact upon the City's reputation in the eyes of the public as a result of same.
- D8.5.2 The Consultant shall pay the Unfair Labour Practice Penalty to the City within thirty (30) Calendar Days of receiving a demand for same in accordance with D8.5. The City may also hold back the amount of the Unfair Labour Practice Penalty from payment for any amount it owes the Consultant.
- (a) The obligations and rights conveyed by this clause survive the expiry or termination of this Contract, and may be exercised by the City following the performance of the Work, should the City determine, that a violation by the Consultant of the above

clauses has occurred following same. In no instance shall the Unfair Labour Practice Penalty exceed the total of twice the Contract value.

## **D9. INFORMATION SECURITY**

- D9.1 The Consultant represents and warrants that it has not been notified of, and has no knowledge of any event or condition that would reasonably be expected to result in, any security breach or other compromise to its information technology and computer systems, networks, hardware, software, information (including the information of its respective customers, employees, suppliers, vendors and any third party information maintained by Consultant on behalf of them), equipment or technology ("Information Systems").
- D9.2 The Consultant further represents and warrants that:
- (i) it has established, will adhere to, and shall maintain during the term of this Contract physical, administrative, organizational, and technical security safeguards, controls and measures to protect its Information Systems, that meet or exceed Good Industry Practice; and
  - (ii) it will adhere to and meet any applicable information security standards or measures identified in this Contract,

collectively the "Information Security Practices". Good Industry Practice as it relates to Information Security Practices shall, at a minimum, include adherence to international standards organizations such as the International Organization for Standardization (ISO) (i.e., ISO/IEC 27002: 2022), or National Institute of Standards and Technology (NIST) (i.e., NIST 800-53 rev 5 - Security and Privacy Controls for Information Systems and Organizations).

- D9.3 At any time during the term of this Contract, the City reserves the right to request proof of the Consultant's adherence to D9.2, including a request for proof of certification by ISO or NIST, or any other certificate that may be requested in this Contract.
- D9.4 Upon becoming aware of any actual, attempted or suspected breach of its Information Systems or unauthorized use, access or disclosure of City owned or supplied Information, whether or not such City owned or supplied Information includes Confidential Information or Personal Information ("Security Breach"), the Consultant shall notify the City of such breach in writing within 48 hours. The Consultant shall take all reasonable steps to prevent the recurrence of any such Security Breach and notify the City when implemented.
- D9.5 The Consultant shall cooperate with the City so that the City can verify that the Consultant has complied, and is complying, with the provisions of this D9.

## **D10. USE OF ARTIFICIAL INTELLIGENCE**

- D10.1 If the Services include the use of AI, the Consultant shall not, and shall not permit its Subconsultants, to upload, input, prompt, disclose, transmit, process, or use City owned or supplied information, including Confidential Information or Personal Information, with or in AI without the express written permission of the City.
- D10.2 If the City grants permission under D10.1, the Consultant shall not, and shall not permit its Subconsultants, to use such City owned or supplied information or output from AI that contains or is derived from such information to develop, improve, train, fine-tune, retrain, evaluate, benchmark, or enhance any AI systems or services of the Consultant, or its Subconsultants, whether or not such information has been anonymized, de-identified or is in aggregate. The Consultant shall also ensure that City owned or supplied information is not retained in prompts, logs, telemetry, or support systems beyond what is expressly approved in writing by the City.
- D10.3 Should the Consultant, its Subconsultants update the Services to include or expand any form of AI to collect, store, use, disclose or analyze City owned or supplied information, the Consultant shall not make such change, and shall not permit its Subconsultants to make such change, to the Services without:

- (i) providing the City written notice describing the proposed change and its impacts on City owned or supplied information; and
- (ii) obtaining the City's prior written approval before the change is made effective.

## **D11. INFORMATION MANAGEMENT**

- D11.1 The following provisions are in addition to any preceding obligations of confidentiality contained in this document. All requirements apply to the Consultant. Further, where the Services &/or Work is being provided by a third party (either by a Subconsultant or authorized third party reseller), the Consultant represents and warrants that it will ensure that the third party meets all of the relevant requirements of the Information Management clauses and will assume responsibility and liability for the third party's compliance or non-compliance.
- D11.2 The Consultant acknowledges that The Freedom of Information and Protection of Privacy Act ("FIPPA") and Personal Health Information Act ("PHIA") imposes obligations on the City to collect, store, use, disclose, and destroy "personal information", as that term is defined in FIPPA, ("Personal Information") in the strictest of confidence and in accordance with FIPPA and PHIA.
- D11.3 The Consultant:
- (a) Shall be deemed to be an Information Manager as that term is defined in FIPPA;
  - (b) Shall be responsible to ensure that all Personal Information is collected, stored, used, disclosed or destroyed only and strictly in accordance with the Contract; and
  - (c) Shall, in respect of all Personal Information, implement and comply with the security requirements, controls, policies, and standards set out in the Contract and the Specifications.
- D11.4 While this Contract is in effect, and at all times thereafter, the Consultant shall treat as confidential any and all Confidential Information which it acquires or that is collected, stored, used, disclosed or destroyed, or to which it is given access, or which in any other way it comes into possession or knowledge of, during the course of the performance of the Contract. For the purposes of this Contract, Personal Information shall be considered to be Confidential Information.
- D11.5 The Consultant shall comply with section 44.1 of FIPPA, and more generally, any collection, storage, use, disclosure or destruction of Personal Information by the Consultant shall be in compliance with FIPPA and PHIA.
- D11.6 Further to C21 of the General Conditions, all Confidential Information is and shall remain the property of the City.
- D11.7 The Consultant shall not disclose or appropriate to their own use, or to the use of any third party, all or any part of the Confidential Information without the prior written consent of the Consulting Contract Administrator. The Consultant shall not at any time make any public announcement, press release, or statement of fact or opinion regarding the Bid Opportunity, the Contract, the Work, the City, or the Confidential Information without the prior written consent of the Consulting Contract Administrator.
- D11.8 While this Contract is in effect and at all times thereafter the Consultant shall: (a) only collect, store, use, disclose or destroy the Confidential Information for the purposes expressly permitted by the City, and only to the extent necessary to perform its obligations under this Contract:
- (a) ensure that access to the Confidential Information is only provided or permitted a "need to know" basis, and that access, when given, shall be the minimum amount necessary to accomplish the task;
  - (b) not disclose or permit the disclosure of the Confidential Information or any copies thereof, whether in whole or in part, in any form or medium, to any third party, including

- Subconsultants or agents, without the prior written consent of the Consulting Contract Administrator;
- (c) not reproduce any Confidential Information, in whole or in part, in any form or medium, without the express prior written consent of the Consulting Contract Administrator; and
  - (d) inform its Subconsultants of the obligations imposed upon it under this Contract and FIPPA, and shall take whatever steps are necessary to ensure that all of its Subconsultants comply with those obligations, including (but not limited to) binding said Subconsultants to terms no less strict than those herein through written confidentiality agreements.
- D11.9 The Consultant shall put into place reasonable security arrangements, including administrative, technical, and physical safeguards that ensure the confidentiality and security of the Confidential Information. The standard of such security arrangements shall be the greater of:
- (a) the standards the Consultant has in place to protect its own confidential information; or
  - (b) the standards imposed on the Consultant by the Consulting Contract Administrator.
- D11.10 Upon becoming aware of any unauthorized use or handling of the Confidential Information (a "Confidentiality Breach"), the Consultant shall immediately notify the Consulting Contract Administrator in writing, take all reasonable steps to prevent the recurrence of any such Confidentiality Breach, and notify the Consulting Contract Administrator of said steps in writing.
- D11.11 Upon receiving a subpoena or other validly issued administrative or judicial order seeking Confidential Information, the Consultant shall provide the Consulting Contract Administrator with prompt notice thereof, deliver a copy of its proposed response to the Consulting Contract Administrator, and thereafter be entitled to comply with the demand to the extent permitted or required by law (unless the demand has been time-limited, quashed, or extended). The Consultant shall cooperate with the Consulting Contract Administrator in the defense of the demand, if so requested by the Consulting Contract Administrator.
- D11.12 The Consultant shall, and shall ensure its Subconsultants, comply with all directives issued by the Consulting Contract Administrator with respect to safeguarding or otherwise ensuring the confidentiality of the Confidential Information, and shall cooperate with the Consulting Contract Administrator so that the Consulting Contract Administrator can verify that the Consultant has complied, and is complying, with its obligations hereunder.

## **SUBMISSIONS**

### **D12. AUTHORITY TO CARRY ON BUSINESS**

- D12.1 The Consultant shall be in good standing under The Corporations Act (Manitoba), or properly registered under The Business Names Registration Act (Manitoba), or otherwise properly registered, licensed or permitted by law to carry on business in Manitoba, or if the Consultant does not carry on business in Manitoba, in the jurisdiction where the Consultant does carry on business, throughout the term of the Contract, and shall provide the Consulting Contract Administrator with evidence thereof upon request.

### **D13. SAFE WORK PLAN**

- D13.1 The Consultant shall provide the Consulting Contract Administrator with a Safe Work Plan at least five (5) Business Days prior to the commencement of any Work on the Site but in no event later than the date specified in C4.4(a) for the return of the executed Contract.
- D13.2 The Safe Work Plan should be prepared and submitted in the format shown in the City's template which is available on the Information Connection page at The City of Winnipeg, Corporate Finance, Purchasing Division website at <http://www.winnipeg.ca/matmgt/safety/default.stm>

## **D14. INSURANCE**

- D14.1 The Consultant shall procure and maintain, at their own expense and cost, insurance policies with limits no less than those shown below.
- D14.2 As a minimum, the Consultant shall, without limiting their obligations or liabilities under any other contract with the City, procure and maintain, at their own expense and cost, the following insurance policies:
- (a) Comprehensive or Commercial General Liability Insurance including:
    - (i) an inclusive limit of not less than \$2,000,000 for each occurrence or accident with a minimum \$2,000,000 Products and Completed Operations aggregate and \$5,000,000 general aggregate;
    - (ii) all sums which the Consultant shall become legally obligated to pay for damages because of bodily injury (including death at any time resulting therefrom) sustained by any person or persons or because of damage to or destruction of property caused by an occurrence or accident arising out of or related to the Services or any operations carried on in connection with this Contract;
    - (iii) coverage for Products/Completed Operations, Blanket Contractual, Consultant's Protective, Personal Injury, Contingent Employer's Liability, Broad Form Property Damage, Employees as Additional Insureds, and Non-Owned Automobile Liability;
    - (iv) a Cross Liability clause and/or Severability of Interest clause providing that the inclusion of more than one Insured shall not in any way affect the rights of any other Insured hereunder in respect to any claim, demand, suit or judgment made against any other Insured.
  - (b) if applicable, Automobile Liability Insurance covering all motor vehicles, owned and operated and used or to be used by the Consultant directly or indirectly in the performance of the Service. The limit of liability shall not be less than \$2,000,000 inclusive for loss or damage including personal injuries and death resulting from any one accident or occurrence.
  - (c) Professional Errors and Omissions Liability Insurance including:
    - (i) an amount not less than \$500,000 . per claim and \$1,000,000 in the aggregate.
- D14.2.1 The Consultant's Professional Errors and Omissions Liability Insurance shall remain in force for the duration of the Project and for twelve (12) months after Total Performance.
- D14.3 The policies required in D14.2(a) shall provide that the City is named as an Additional Insured thereunder and that said policies are primary without any right of contribution from any insurance otherwise maintained by the City.
- D14.4 The Consultant shall require any Consultants hired to perform geo technical drilling and sample collecting or closed-circuit television to procure and maintain, at their own expense and cost, comparable insurance to that set forth under D14.2(a) and D14.2(b).
- D14.5 The Consultant shall require each of their Subconsultants hired for design, architectural or engineering services as outlined in the Scope of Services to provide comparable insurance to that set forth under D14.2(a) and D14.2(c).
- D14.6 The Consultant shall provide the Consulting Contract Administrator with a certificate(s) of insurance in a form satisfactory to the City Solicitor, at least two (2) Business Days prior to the commencement of any Services, but in no event later than the date specified in C4.4(a) for the return of the executed Contract. Such certificates shall state the exact description of the Services and provide for written notice in accordance with D14.9.
- D14.7 The Consultant may take out such additional insurance as it may consider necessary and desirable. All such additional insurance shall be at no expense to the City.

- D14.8 All insurance, which the Consultant is required to obtain with respect to this Contract, shall be with insurance companies registered in and licensed to underwrite such insurance in the Province of Manitoba.
- D14.9 The Consultant shall not cancel, materially alter, or cause any policy to lapse without providing at least thirty (30) Calendar Days prior written notice to the City.

## **SCHEDULE OF SERVICES**

### **D15. COMMENCEMENT**

- D15.1 The Consultant shall not commence any Services until it is in receipt of a notice of award from the City authorizing the commencement of the Services.
- D15.2 The Consultant shall not commence any Services until:
- (a) the Consulting Contract Administrator has confirmed receipt and approval of:
    - (i) evidence of authority to carry on business specified in D12;
    - (ii) the Safe Work Plan specified in D13; and
    - (iii) evidence of the insurance specified in D14.
  - (b) the Consultant has attended a meeting with the Consulting Contract Administrator, or the Consulting Contract Administrator has waived the requirement for a meeting;
  - (c) The direct deposit application specified in D18.1.
- D15.3 The City intends to award this Contract by July 1, 2026.

### **D16. SUPPLY CHAIN DISRUPTION SCHEDULE DELAYS**

- D16.1 The City acknowledges that the schedule for this Contract may be impacted by Supply Chain Disruption. Commencement and progress of the Services shall be performed by the Consultant with due consideration to delivery requirements and schedule identified in the Contract, in close consultation with the Consulting Contract Administrator.
- D16.2 If the Consultant is delayed in the performance of the Services by reason of the Supply Chain Disruption, the Services schedule may be adjusted by a period of time equal to the time lost due to such delay and costs related to such delay will be determined as identified herein.
- D16.3 A minimum of seven (7) Calendar Days prior to the commencement of Services, the Consultant shall declare whether a Supply Chain Disruption will affect the start date. The Consultant shall provide sufficient evidence that the delay is directly related to a Supply Chain Disruption, including but not limited to evidence related to availability of staff, ordering of Material or Goods, production and/or manufacturing schedules or availability of staff as appropriate.
- D16.4 For any delay related to Supply Chain Disruption and identified after Services have commenced, the Consultant shall within seven (7) Calendar Days of becoming aware of the anticipated delay declare the additional delay and shall provide sufficient evidence as indicated in D16.3. Failure to provide this notice will result in no additional time delays being considered by the City.
- D16.5 The Services schedule, including the durations identified in the Contract, will be adjusted to reflect delays accepted by the Consulting Contract Administrator.
- D16.6 Any time or cost implications as a result of Supply Chain Disruption and in accordance with the above, as confirmed by the Consulting Contract Administrator, shall be documented in accordance with C8.

## MEASUREMENT AND PAYMENT

### D17. INVOICES

D17.1 Further to C11, Consultant:

- (a) shall submit invoices for Work performed in accordance with the instruction on the City's website at: <https://www.winnipeg.ca/finance/corporate-accounts-payable.stm>; and
- (b) should copy the Consulting Contract Administrator on submission of its invoice.

### D18. PAYMENT

D18.1 Further to C11.14, the City shall make payments to the Consultant by direct deposit to the Consultant's banking institution, and by no other means. Payments will not be made until the Consultant has made satisfactory direct deposit arrangements with the City. Direct deposit application forms are at [https://winnipeg.ca/finance/files/Direct\\_Deposit\\_Form.pdf](https://winnipeg.ca/finance/files/Direct_Deposit_Form.pdf).

## DISPUTE RESOLUTION

### D19. DISPUTE RESOLUTION

D19.1 If the Consultant disagrees with any opinion, determination, or decision of the Consulting Contract Administrator, the Consultant shall act in accordance with the Consulting Contract Administrator's opinion, determination, or decision unless and until same is modified by the process followed by the parties pursuant to D19.

D19.2 The entire text of C17.4 is deleted, and amended to read: "Intentionally Deleted".

D19.3 The entire text of C17.5 is deleted, and amended to read:

- (a) If Legal Services has determined that the Disputed Matter may proceed in the Appeal Process, the Consultant must, within ten (10) Business Days of the date of the Legal Services Response Letter, submit their written Appeal Form, in the manner and format set out on the City's Purchasing Website, to the Chief Administrative Officer, and to the Consulting Contract Administrator. The Consultant may not raise any other disputes other than the Disputed Matter in their Appeal Form.

D19.4 Further to C17, prior to the Consulting Contract Administrator's issuance of a Final Determination, the following informal dispute resolution process shall be followed where the Consultant disagrees with any opinion, determination, or decision of the Consulting Contract Administrator ("Dispute"):

- (a) In the event of a Dispute, attempts shall be made by the Consulting Contract Administrator and the Consultant's equivalent representative to resolve Disputes within the normal course of project dealings between the Consulting Contract Administrator and the Consultant's equivalent representative.
- (b) Disputes which in the reasonable opinion of the Consulting Contract Administrator or the Consultant's equivalent representative cannot be resolved within the normal course of project dealings as described above shall be referred to a without prejudice escalating negotiation process consisting of, at a minimum, the position levels as shown below and the equivalent Consultant representative levels:
  - (i) The Consulting Contract Administrator;
  - (ii) Supervisory level between the Consulting Contract Administrator and applicable Department Head;
  - (iii) Department Head.

D19.4.1 Names and positions of Consultant representatives equivalent to the above City position levels shall be determined by the Consultant and communicated to the City at the pre-commencement or kick off meeting.

- D19.4.2 As these negotiations are not an adjudicative hearing, neither party may have legal counsel present during the negotiations.
- D19.4.3 Both the City and the Consultant agree to make all reasonable efforts to conduct the above escalating negotiation process within twenty (20) Business Days, unless both parties agree, in writing, to extend that period of time.
- D19.4.4 If the Dispute is not resolved to the City and Consultant's mutual satisfaction after discussions have occurred at the final escalated level as described above, or the time period set out in D19.4.3, as extended if applicable, has elapsed, the Consulting Contract Administrator will issue a Final Determination as defined in C1.1(dd), at which point the parties will be governed by the Dispute Resolution process set out in C17.

### THIRD PARTY AGREEMENTS

#### D20. FUNDING AND/OR CONTRIBUTION AGREEMENT OBLIGATIONS

- D20.1 In the event that funding for the Services of the Contract is provided to the City of Winnipeg by the Government of Manitoba and/or the Government of Canada, the following terms and conditions shall apply, as required by the applicable funding agreements.
- D20.2 Further to 0, in the event that the obligations in D20 apply, actual costs legitimately incurred by the Consultant as a direct result of these obligations ("Funding Costs") shall be determined by the actual cost to the Consultant and not by the valuation method(s) outlined in C8.4. In all other respects Funding Costs will be processed in accordance with Changes in Services under C8.
- D20.3 For the purposes of D20:
- (a) "**Government of Canada**" includes the authorized officials, auditors, and representatives of the Government of Canada; and
  - (b) "**Government of Manitoba**" includes the authorized officials, auditors, and representatives of the Government of Manitoba.
- D20.4 Modified Insurance Requirements
- D20.4.1 If not already required under the insurance requirements identified in D14, the Consultant will be required to obtain and maintain professional liability insurance in an amount of no less than one million dollars (\$1,000,000) inclusive per claim. Such policy shall be maintained for at least twenty four (24) months after Total Performance.
- D20.4.2 The Consultant shall obtain and maintain third party liability insurance with minimum coverage of two million dollars (\$2,000,000.00) per occurrence on all licensed vehicles operated at the Site. In the event that this requirement conflicts with another licensed vehicle insurance requirement in this Contract, then the requirement that provides the higher level of insurance shall apply.
- D20.4.3 Insurers shall provide satisfactory Certificates of Insurance to the Government of Manitoba prior to commencement of Services as written evidence of the insurance required. The Certificates of Insurance must provide for a minimum of thirty (30) days' prior written notice to the Government of Manitoba in case of insurance cancellation.
- D20.4.4 All policies must be taken out with insurers licensed to carry on business in the Province of Manitoba.
- D20.5 Indemnification By Consultant
- D20.5.1 In addition to the indemnity obligations outlined in C13 of the General Conditions for Consultant Services, the Consultant agrees to indemnify and save harmless the Government of Canada and the Government of Manitoba and each of their respective Ministers, officers, servants, employees, and agents from and against all claims and

demands, losses, costs, damages, actions, suit or other proceedings brought or pursued in any manner in respect of any matter caused by the Consultant or arising from this Contract or the Services, or from the goods or services provided or required to be provided by the Consultant, except those resulting from the negligence of any of the Government of Canada's or the Government of Manitoba's Ministers, officers, servants, employees, or agents, as the case may be.

- D20.5.2 The Consultant agrees that in no event will Canada or Manitoba, their respective officers, servants, employees or agents be held liable for any damages in contract, tort (including negligence) or otherwise, for:
- (a) any injury to any person, including, but not limited to, death, economic loss or infringement of rights;
  - (b) any damage to or loss or destruction of property of any person; or
  - (c) any obligation of any person, including, but not limited to, any obligation arising from a loan, capital lease or other long term obligation;

D20.5.3 in relation to this Contract or the Work.

#### D20.6 Records Retention and Audits

D20.6.1 The Consultant shall maintain and preserve accurate and complete records in respect of this Contract and the Services, including all accounting records, financial documents, copies of contracts with other parties and other records relating to this Contract and the Services during the term of the Contract and for at least six (6) years after Total Performance. Those records bearing original signatures or professional seals or stamps must be preserved in paper form; other records may be retained in electronic form.

D20.6.2 In addition to the record keeping and inspection obligations outlined in C7.16 of the General Conditions for Consultant Services, the Consultant shall keep available for inspection and audit at all reasonable times while this Contract is in effect and until at least six (6) years after Total Performance, all records, documents, and contracts referred to in D20.6.1 for inspection, copying and audit by the City of Winnipeg, the Government of Manitoba and/or the Government of Canada and their respective representatives and auditors, and to produce them on demand; to provide reasonable facilities for such inspections, copying and audits, to provide copies of and extracts from such records, documents, or contracts upon request by the City of Winnipeg, the Government of Manitoba, and/or the Government of Canada and their respective representatives and auditors, and to promptly provide such other information and explanations as may be reasonably requested by the City of Winnipeg, the Government of Manitoba, and/or the Government of Canada from time-to-time.

#### D20.7 Other Obligations

D20.7.1 The Consultant consents to the City providing a copy of the Contract Documents to the Government of Manitoba and/or the Government of Canada upon request from either entity.

D20.7.2 If the Lobbyists Registration Act (Manitoba) applies to the Consultant, the Consultant represents and warrants that it has filed a return and is registered and in full compliance with the obligations of that Act, and covenants that it will continue to comply for the duration of this Contract.

D20.7.3 The Consultant shall comply with all applicable legislation and standards, whether federal, provincial, or municipal, including (without limitation) labour, environmental, and human rights laws, in the course of providing the Services.

D20.7.4 The Consultant shall properly account for the Services provided under this Contract and payment received in this respect, prepared in accordance with generally accepted accounting principles in effect in Canada, including those principles and standards approved or recommended from time-to-time by the Chartered Professional Accountants of

Canada or the Public Sector Accounting Board, as applicable, applied on a consistent basis.

D20.7.5 The Consultant represents and warrants that no current or former public servant or public office holder, to whom the Value and Ethics Code for the Public Sector, the Policy on Conflict of Interest and Post Employment, or the Conflict of Interest Act applies, shall derive direct benefit from this Contract, including any employment, payments, or gifts, unless the provision or receipt of such benefits is in compliance with such codes and the legislation.

D20.7.6 The Consultant represents and warrants that no member of the House of Commons or of the Senate of Canada or of the Legislative Assembly of Manitoba is a shareholder, director or officer of the Consultant or of a Subconsultant, and that no such member is entitled to any benefits arising from this Contract or from a contract with the Consultant or a Subconsultant concerning the Work.

## PART E - SECURITY CLEARANCE

### E1. SECURITY CLEARANCE

- E1.1 Each individual proposed to perform Services under the Contract shall be required to obtain a Police Information Check from the police service having jurisdiction at their place of residence. This can be obtained from one of the following:
- (a) police service having jurisdiction at their place of residence; or
  - (b) Sterling BackCheck – for existing account holders, log into your account to send individual invitations to employees requiring security clearance. For those that do not have an account, click on the following link to open an account:  
<https://forms.sterlingbackcheck.com/partners/platform2-en.php?&partner=winnipegcity> ; or
  - (c) Commissionaires (Manitoba Division), forms to be completed can be found on the website at: <https://www.commissionaires.ca/en/manitoba/home>; or
  - (d) FASTCHECK Criminal Record & Fingerprint Specialists, forms to be completed can be found on the website at: <https://myfastcheck.com>
- E1.2 Prior to the award of Contract, and during the term of the Contract if additional or replacement individuals are proposed to perform Services, the Proponent/Consultant shall supply the Consulting Contract Administrator with a Police Information Check obtained not earlier than one (1) year prior to the Submission Deadline, or a certified true copy thereof, for each individual proposed to perform the Services.
- E1.3 Any individual for whom a Police Information Check is not provided, or for whom a Police Information Check indicates any convictions or pending charges related to property offences or crimes against another person will not be permitted to perform any Services.
- E1.4 Any Police Information Check obtained thereby will be deemed valid for the duration of the Contract subject to a repeated records search as hereinafter specified.
- E1.5 Notwithstanding the foregoing, at any time during the term of the Contract, the City may, at their sole discretion and acting reasonably, require an updated Police Information Check. Any individual who fails to provide a satisfactory Police Information Check as a result of a repeated Police Information Check will not be permitted to continue to perform any Services.