



**WOOD BUFFALO
ENVIRONMENTAL ASSOCIATION**

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Request for Proposal

RFP104-24

Safety Documentation Management

Strictly Private & Confidential

Wood Buffalo Environmental Association

Date: February 22nd, 2024



Confidentiality

This Request for Proposals has been created for the purpose of requesting submission of a formal proposal to the Wood Buffalo Environmental Association (“WBEA”) for the provision of services described herein.

By choosing to obtain this Request for Proposals document, proponents are expected to keep confidential all documents, data, information and other materials of the WBEA which are provided to or obtained or accessed by a proponent in relation to this Request for Proposals, other than documents which the WBEA places in the public domain. Proponents are expected not to make any public announcements or news releases regarding this Request for Proposals or the entering into of a definitive agreement pursuant to this Request for Proposals, without the prior written approval of the WBEA. **Disclosure of details from within this Request for Proposals, or distribution of this document itself, will only be permissible if written permission is first granted from Sanjay Prasad, Executive Director of the WBEA.**



Introduction:

The Wood Buffalo Environmental Association is requesting proposals from qualified service providers for the provision of the services described herein.

The Wood Buffalo Environmental Association is committed to and responsible for the health and safety (including physical, psychological, and social well-being) of its employees, contractors, and the workplace. To prevent workplace-induced injuries, illness, property damage, or the loss of physical assets, WBEA has developed a safety culture based on mutual respect and cooperation within the organization that fosters a feeling of partnership with all employees. At WBEA, there are respective responsibilities for health and safety for the Executive Director, Leads, workers, and contractors.

Your written response, **including the requirements identified in this Request for Proposal**, should be delivered to the WBEA by **end of day (5:00 pm MST) on March 22nd, 2024**, via email, to Corrie Jeffery, Procurement Analyst, at supplychain@wbea.org.

For questions or additional information please contact Corrie Jeffery, Procurement Analyst.

On behalf of The Wood Buffalo Environmental Association,

Corrie Jeffery

Procurement Analyst

Wood Buffalo Environmental Association

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Date: February 22nd, 2024
Reference Number: RFP104-24
Title: Safety Documentation Management

1. Purpose of Request for Proposal

The Wood Buffalo Environmental Association (the "WBEA") is inviting written proposals for the provision of services for Safety Documentation Management (the "**Services**").

- 1.1. The purpose of this Request for Proposals ("RFP") process is to select a qualified proponent to enter into a definitive agreement ("Agreement") with the WBEA for the delivery of the Services. Further details about the Services required by the WBEA are set out in this RFP, including in Section 4.
- 1.2. This RFP is not a tender and is not subject to the laws of competitive bidding. No bid contract or agreement is created by the submission of a proposal.

2. Agreement Term

- 2.1. The initial term of the Agreement sought under this RFP is for an approximate five (5) year period, with the possibility to extend the Agreement beyond this initial period.

3. Inquiries

- 3.1 Proponents are responsible for reading and familiarizing themselves with the provisions of this RFP and other accompanying documents (if and as applicable), and should make those inquiries and investigations they consider necessary for the preparation and submission of their proposal.
- 3.2 Any inquiries concerning this RFP should be directed to the following:
 - Corrie Jeffery, Procurement Analyst – (780) 215-5418 or supplychain@wbea.org.
- 3.3. All inquiries should be in writing and received by the WBEA no later than 5 days before the closing date and time for this RFP.
- 3.4 The WBEA may circulate its response to any inquiries to all proponents, along with the original inquiry, or may choose not to reply to any inquiry.
- 3.5 Proponents should refrain from contacting other employees, agents or officials of the WBEA in respect of this RFP process, including for the purposes of lobbying or attempting to influence the outcome of this RFP process. Any such contact may, in the WBEA's sole discretion, result in disqualification.

4. Scope of Services

- 4.1 The Services required by the WBEA, and for which written proposals are invited pursuant to this RFP, are as follows:.

The Proponent will provide Safety Documentation Management Services including but not limited to the following:



Deliverable	Task
Platform & Infrastructure Support	Task 1. <ul style="list-style-type: none"> Provide monthly support for Workhub, Formstack and Zoho Infrastructure and platform maintenance. System support activities include: <ol style="list-style-type: none"> Workhub records review, approval, and assignment of action items for form submissions that contain deficiencies. Form submissions without deficiencies will auto-approve. Workhub training review and approval Workhub, Formstack and Zoho personnel updates Zoho form updates Regulatory/COR consultations System software troubleshooting Monthly reporting and analysis Safety bulletin generation and distribution Quarterly Board Reports Track and provide monthly reporting of KPI Matrix
Safety Meetings	Task 2. <ul style="list-style-type: none"> Prepare and deliver safety meetings content and maintain in Workhub
JWHSC Meetings	Task 3. <ul style="list-style-type: none"> Attend and provide consultation to the JWHSC meetings Support /complete action items arising out of JWHSC meetings
New Hire Orientation	Task 4. <ul style="list-style-type: none"> Conduct new hire orientations
Incident & Near Miss Support	Task 5. <ul style="list-style-type: none"> Near Miss / Incident consultations/ support
Additional Services	<ul style="list-style-type: none"> Training Development Incident Investigation Policy/Practice/Procedure Development/Editing Additional Digital Form Development Media Services (Photography/Videography) Video Editing

**Joint Worksite Health and Safety Committee (JWHSC)*

5. Anticipated Schedule

5.1. The following is the anticipated schedule of events related to this RFP. These dates are provided as target dates only and may be changed at any time by the WBEA in its sole discretion:

Date	Details
February 22 nd , 2024	RFP formally issued
March 15 th , 2024	Deadline for inquiries respecting RFP
March 22nd, 2024	Proposal deadline/Closing Date <ul style="list-style-type: none"> Submitted to Corrie Jeffery, Procurement Analyst, WBEA
March 23 rd – March 27 th , 2024	Proposal evaluation



Date	Details
March 28 th , 2024	Notification to unsuccessful and selected proponents
March 28 th – 29 th , 2024	Negotiation of Agreement with select proponent
March 30 th , 2024	Tentative Agreement execution
April 1 st , 2024	Service commencement
March 31 st , 2029	Service completion

6. Responding Proposal Requirements

- 6.1. In responding to this RFP, proponents should provide, at a minimum, the following information and supporting documentation. This proposed structure is intended to minimize the efforts of proponents and the analysis by the WBEA:
- a) Proponent background information, including firm size, structure, areas of practice, and demonstrated capacity to deliver services.
 - b) A detailed description of the Services to be provided, how the Services will be managed, and the overall objective in providing each component of the Services.
 - c) A description of experience with similar types of organizations/organizational environments, including two or more relevant references for Services of similar size and scope.
 - d) Qualifications of the proponent's assigned primary consultant, who will manage the relationship with the WBEA, and other personnel assigned to the Services (include resumes). List any professional affiliations, licensures, and certifications that are pertinent to the Services.
 - e) A detailed cost estimate for Services to be provided. This must be presented based on the requirements included in Section 4, Scope of Services.
 - f) Hourly rates of professionals identified in Section 6.1(d), as well as rates charged by their support staff, in the event of requests for additional advisory services.
 - g) Description of any Services that will be outsourced by the proponent. If Services will be outsourced, the proponent shall provide the names and information of the third-party service provider(s).
 - h) Scheduling and availability.
 - i) Add any other service-specific requirements.
- 6.2. All proposals submitted and any other correspondence must be in English. All submissions must be prepared in a legible manner. Non-legible proposals may, in the WBEA's sole discretion, be rejected without further review.
- 6.3. If you require additional time to submit your proposal, you should contact Corrie Jeffery by e-mail to supplychain@wbea.org. The WBEA may, in its sole discretion, allow additional time for proponents to submit a proposal.
- 6.4. Proposals and accompanying documentation provided to the WBEA in response to this RFP will not be returned unless otherwise requested by the proponent.



7. Submission of Proposal and Closing Date

- 7.1. All responses are to be submitted by email in PDF or MS Word format, together with any supplementary materials, to:

Corrie Jeffery, Procurement Analyst
supplychain@wbea.org

Faxed proposals will not be accepted without the express written consent of the WBEA.

- 7.2. Responses must be received by the WBEA no later than end of day (5:00pm) on **March 22nd, 2024**.
- 7.3. **“RFP104-24 Safety Documentation Services, WBEA”** and the applicable closing date must be included in the subject line.
- 7.4. This RFP, and the submission of a proposal pursuant to this RFP, does not create any legal obligations between the WBEA and any proponent.

8. Proposal Evaluation

- 8.1. Evaluation of proposals by the WBEA will be based on the following criteria:
- a) Qualifications and reputation of the proponent and proposed staff.
 - b) Relevant experience of the proponent in the Service areas being proposed.
 - c) Cost estimate for the Services proposed.
 - d) Completeness of the proponent’s proposal.
 - e) Feedback obtained from references.
 - f) Sufficiency of staffing and commitment to availability and responsiveness.
 - g) Willingness of the proponent to enter in an Agreement with the WBEA, and the terms the proponent is willing to accept.
 - h) Any other factor that the WBEA determines, at its discretion, to be necessary or appropriate.
- 8.2 The WBEA has not predetermined the relative importance of the above evaluation criteria. The WBEA expects to select the proponent that provides the best overall value, as determined by the WBEA in its sole discretion, having regard to the evaluation criteria referred to above.
- 8.3 Proposals will be evaluated on the basis of the information provided in response to this RFP. In addition, in assessing the proponent's qualifications, experience and capacity, the WBEA may also consider the following:
- a) clarifications and/or additional information that may be supplied pursuant to requests from the WBEA;
 - b) interviews and/or reference checks that may be conducted at the WBEA’s discretion;
 - c) previous experience of the WBEA in working with the proponent; and



- d) information received from any source that the WBEA considers reliable.
- 8.4 It is important for proponents to note that certain evaluation criteria (such as reference checks or proponent reputation) may be viewed by the WBEA, in its sole discretion, as overriding in nature such that a proponent may be rejected on the basis of serious problems or issues in one of these categories alone, whether such issues are apparent in the initial evaluation of proposals or become apparent to the WBEA at any other time during the RFP process.
- 8.5 The WBEA may, in its sole discretion, request clarification from a proponent during the evaluation process.
- 8.6 Proponents are advised that the evaluation process is subjective in nature and the WBEA's intention is to consider, in its sole discretion, each proposal on its merits, without regard to the rules or principles of competitive bidding. The WBEA reserves the right to select a successful proponent in any manner it deems to be in the best interest of the WBEA and make the selection based on its sole discretion, notwithstanding the criteria set forth herein, including negotiating with one or more of the proponents concurrently.

9. Effect of RFP and Additional Terms

- 9.1. This RFP is not intended to be a tender or otherwise subject to the laws applicable to competitive bidding. Until such time as the WBEA signs an Agreement with a proponent, the WBEA does not intend to create a contractual relationship (including without limitation a bid contract), either express or implied, with any proponent submitting a response to this RFP.
- 9.2. The WBEA reserves the right to reject any, some, or all proposals received in response to this RFP as determined to be in the best interest of the WBEA.
- 9.3. The WBEA may short-list proponents and conduct interviews, conference calls and/or presentations with short-listed proponents at its sole discretion. Furthermore, the WBEA may negotiate any and all aspects of a proposal, including but not limited to the fee proposal and Agreement terms, with one or more proponents.
- 9.4. An invitation to interview or to negotiate does not obligate the WBEA to conclude an Agreement with that proponent. The WBEA reserves the right to issue clarifications and other directives concerning this RFP, to require clarification or further information with respect to any proposal received, and to determine the final scope and terms of any Agreement, and whether to enter any Agreement.
- 9.5. The WBEA reserves the right to terminate this RFP or dismiss any proposal response at any time.
- 9.6. The WBEA shall not be obligated to explain its final selection of proponents or disclose any information about the responses, quotations, or proposals received or selected.
- 9.7. For greater certainty, terms such as "requirement", "shall", "must" or other similar imperatives used in this RFP are intended as terms of convenience only, unless otherwise identified specifically as a mandatory requirement.



- 9.8. Proposals may be withdrawn or amended by a proponent at any time by written notice to the WBEA prior to the WBEA and the proponent signing a formal agreement.
- 9.9. Proponents are advised that the WBEA is intending to conduct a flexible procurement process, and that the WBEA may, in its sole discretion, at any time and for any reason:
- a) reject any and all proposals (including, for greater certainty, the lowest cost proposal);
 - b) modify or vary any aspect of this RFP at any time before or after the time for submission of proposals;
 - c) extend the deadline for submission of proposals at any time before or after the closing date for submission of proposals;
 - d) accept any non-compliant, conditional or irregular proposal or any alternate proposal, in whole or in part;
 - e) discuss the terms of a proposal submitted by a proponent with that proponent at any time, on a confidential basis, for the purposes of clarification and/or negotiation of that proposal;
 - f) allow any proponent submitting a proposal to modify or vary any aspect of its proposal at any time;
 - g) verify or seek clarification of any and all information provided pursuant to this RFP and provide proponents with an opportunity to correct any defects, informalities or irregularities in their proposal;
 - h) negotiate any and all aspects of any proposal and the provisions of the Agreement (including, without limitation, those provisions relating to fees and/or any scope of supply of services) with any one or more proponents at any time in its sole discretion, whether before, during or after the selection and evaluation process; and
 - i) cancel this RFP at any time for any reason and thereafter proceed in any manner it sees fit, in its sole discretion, including:
 - i) issuing a new request for proposals or other procurement document based on the same or changed scope of services or other requirements;
 - ii) entering into sole source negotiations with any one or more of the proponents or any other person; or
 - iii) cancelling the procurement in its entirety.
- 9.10. This RFP and the Agreement entered into by the WBEA and the successful proponent shall be governed and construed in accordance with the laws of the Province of Alberta and the federal laws of Canada applicable therein.

10. Costs Incurred by Proposer

- 10.1. The WBEA is not responsible for any costs incurred by proponents in preparing their proposals, attending any meetings or interviews with the WBEA, making any presentations to the WBEA in connection with their proposals, negotiating an Agreement with the WBEA, or otherwise incurred in connection with this RFP process.

11. Selection of Successful Proponent

- 11.1. The successful proponent will be expected to enter into an Agreement for the Services in a form acceptable to the WBEA and the successful proponent.



- 11.2. Any Agreement executed pursuant to this RFP will, among other things, require the successful proponent to indemnify and hold harmless the WBEA and its officers and its employees, from and against all liability, claims, losses, and demands, on account of any injury, loss, or damage, which may arise out of or be connected with the proponent's performance of the Services, to the extent that such injury, loss, or damage, or any portion thereof, is caused by, or claims to be caused by, the negligent act, omission, or other fault of the proponent or any subcontractor of the proponent, or any officer, employee, or agent of the proponent or any subcontractor, or any person for whom the proponent is responsible.
- 11.3. The Agreement shall also require the selected proponent to carry adequate amounts of insurance, including professional liability insurance. Please indicate the level that you carry in your proposal. Said insurance will be required to be maintained in full force and effect during the term of the Agreement.
- 11.4. The WBEA may conduct such investigations, as it deems necessary, to assist in the evaluation of any proposal.

