



Government of Bermuda  
Ministry of Home Affairs  
Department of Planning

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**Request for Proposals (RFP)**  
**Letter of Invitation**

RFP: 2015-DP-001

July 27, 2015

Dear Bidders

This is a call for Request for Proposals (RFP) for the acquisition of a Planning, Building and Enforcement COTS Application.

Proposals are invited from contractors who are at a minimum capable of providing a commercial off the shelf (COTS), customizable hybrid cloud vendor hosted/SaaS solution that will support the case management, document management and geographic information system needs associated with the planning application and building permit processing lifecycle as specified in the project scope.

You are kindly invited to submit a sealed proposal in accordance with the accompanying documents for the above captioned RFP;

To enable you to submit a proposal, please find enclosed:

- Letter of invitation;
- Section A Instructions to Bidders;
- Section B Statement of Requirements, contains a description of requirements for which these services are being sought;
- Requirements Working Document – (Annex 3) to be completed and returned with your proposal;
- Section C Technical Proposal Forms with several attachments (Annex 4) to be completed and returned with your proposal;
- Section D Financial Proposal Form (Annex 1) to be completed and returned with your proposal;
- Section E Certificate of Confirmation of Non Collusion (Annex 5) to be completed and returned with your proposal;
- Section F Evaluation Matrix;
- Section G Sample Statement of Work (Annex 12)
- Checklist of required documentation (Annex 2);
- Department processes (Annex 6 – Annex 11)

Your hard copy proposal can be submitted to the Department of Planning, 58 Court Street, Dame Lois Browne-Evans Building 5<sup>th</sup> floor Hamilton HM 12, Bermuda no later than September 4, 2015 at 5:00 PM (AST). The outer envelope should be clearly marked with the title "Proposal for the RFP for the Planning, Building and Enforcement COTS application DO NOT OPEN BEFORE 5:00 pm on September 4, 2015".

Electronic submissions are also welcomed, and should be sent to [rmlowry@gov.bm](mailto:rmlowry@gov.bm), with the subject line, "Proposal for the RFP for the Planning, Building and Enforcement COTS application DO NOT OPEN BEFORE 5:00 pm on September 4, 2015", and must be received no later than 5:00 PM (AST) on September 4, 2015.

**Queries:**

Any queries must be *in writing* and directed to Nancy Booth, by e-mail at [nebooth@gov.bm](mailto:nebooth@gov.bm). The last date on which questions will be received is no later than 5:00 PM (AST) on August 12, 2015. Answers will be disseminated in addendum format for all Bidders to see on the [www.opmp.gov.bm](http://www.opmp.gov.bm) website under Procurement Notices by end of day August 21, 2015.

This letter is not to be construed in any way as an offer to contract with your firm.

We look forward to receiving your proposal and thank you in advance for your interest in Government procurement opportunities.

Yours Sincerely

Aideen Ratteray Pryse  
Director, Department of Planning

## **Executive Summary**

### **Project Background:**

The Department of Planning currently has a bespoke planning information and data management system which was first built in 1999 and has had several system enhancements since its initial implementation. The application is used to record information on land parcels, planning applications, building permits, subdivisions, inspections, complaints, enforcement records and planning searches. It is also used to track appeals, Special Development Orders, Listed Buildings, and other protective measures on land parcels.

Using its SQL database, the system generates file paperwork; correspondence with applicants, agents and consultees; Board reports, agendas and minutes; inspection records; and management statistics. It has integrated GIS and map querying functions with layers of geographic data including land use zonings, aerial photos and topographic data.

This software is reaching end of life and therefore, the Department of Planning is interested in procuring a robust Planning, Building and Enforcement application that can meet the demands of the Department.

In 2007, the Department of Planning built its website (<http://www.planning.gov.bm/>) which contains numerous documents for downloading, a search facility for the applications/permits database, and an interactive zoning map browser. The website was custom-built using ASP.NET.

### **Department Statistics:**

Last year the Department of Planning processed the following:

- 587 planning applications
- 877 building permits
- 6000+ inspections
- 977 revisions
- 200 enforcements
- 200 searches

### **Department Responsibilities:**

- Preparation of development plans;
- Management of all development on the island through a system of development control;
- Monitoring and enforcement of planning control;
- Management of all building activity through a building permit system; and
- Enforcement of the relevant building codes through inspections

### **Department Objectives:**

- To plan for the environmental, economic and social needs of Bermuda to ensure that the development is accommodated in a sustainable way.
- To manage the development of land to ensure its optimum use.
- To conserve important flora and fauna, woodlands and natural habitats.
- To provide transparency and consistency in the application of stated policies and standards.
- To determine applications in an efficient manner and within reasonable timescales.

- To ensure building operations are carried out in compliance with the current building codes and regulation for the health, safety and welfare of the community.
- To give best advice and information to the public in a helpful and efficient manner.
- To provide excellent customer service by serving the public in a professional, courteous and personal manner.

The proposed solution should allow for the realization of these responsibilities and objectives. Please see the detailed requirements found in Section B.

The following outlines the RFP process and associated dates.

**Sequence of Events**

DATE:	TIME:	ACTIVITY:
Monday, July 27, 2015	9:00 AM (AST)	Request for Proposal Published on www.opmp.gov.bm (Procurement Notices/Current Procurement Notices)
Wednesday, August 12, 2015	5:00 PM (AST)	Bidders' questions due
Friday, August 21, 2015	5:00 PM (AST)	Publish Bidders Questions and Answers posted on www.opmp.gov.bm (Procurement Notices/Current Procurement Notices)
Friday, September 4, 2015	5:00 PM (AST)	Submission Deadline for Bidders to response.
Thursday, September 17, 2015		Selection of shortlisted Bidders
Monday, October 5, 2015 to Wednesday October 7, 2015.		Oral Presentation(s)/ and /or product demonstrations by finalist(s). The exact times and dates slots will be communicated to finalist(s) in due time.
Monday, October 12, 2015	5:00 PM (AST)	Successful Bidder informed
TBA		Develop Contract and Project Agreement
Thursday, March 31, 2016		Implementation must be completed

**Department Contact Information:**

Richard Lowry  
 Department of Planning  
 Dame Lois Browne-Evans Building 5<sup>th</sup> floor  
 58 Court Street  
 Hamilton HM 12, Bermuda  
 rmlowry@gov.bm

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## 1 SECTION A – INSTRUCTIONS TO BIDDERS

### GENERAL CONDITIONS AND REQUIREMENT

#### 1.1 PUBLIC ACCESS TO INFORMATION:

- i. Any information collected or used by or on behalf of the Government of Bermuda under this solicitation document is subject to the Public Access to Information Act 2010 (“Act”). The information belongs to a class of information that might be made available to the general public unless it is contained in a record that is exempt from disclosure under the Act. Any questions regarding the collection, use, or disclosure of the information should be directed to the public authority that issued this solicitation document.

#### 1.2 Submission Due Date

- i. Proposals must be received no later than 5:00 p.m. Atlantic Standard Time (AST), on September 4, 2015.
- ii. All submissions become the property of the Government of Bermuda and will not be returned. All conditions contained in the RFP are considered accepted by the Bidder in any information submitted.
- iii. Proposals received after the stated deadline will be considered as 'NO BID' and 'VOID'. The time stamp for proposals submitted electronically will be that of the Information Technology Office (ITO) mail server. It is the Bidder's responsibility to allow enough time for electronic transmission and delivery, especially in the case of large files.
- iv. **Late proposals “WILL NOT BE CONSIDERED”**. The deadline is absolute and proposals received after the due date and time shall be rejected. Bidders must select a method of delivery that ensures proposals will be delivered to the correct location by the due date and time.
- v. Proposals may be delivered in person, mailed or emailed to the Department of Planning. Any proposal which is mailed but does not reach the Department of Planning by the date and time set forth above will not be accepted, regardless of post mark.

#### 1.3 Submission Delivery

- i. Bidders must submit at least one signed printed copy or one signed electronic copy of their proposal. The pricing proposal shall be submitted on the Financial Proposal form (Annex 1).
- ii. All submissions must be in Microsoft Word (or pdf); and at least one signed, printed copy must be included, or with one signed electronic copy on in Word, .pdf or other common format.
- iii. Sealed proposals must be delivered to the Department of Planning Reception at the address listed below no later than 5:00 PM Atlantic Standard Time (AST) on September 4, 2015.

The mailing address for proposals is:  
Department of Planning  
Dame Lois Browne-Evans Building 5<sup>th</sup> floor  
58 Court Street  
Hamilton HM 12, Bermuda  
Attn: Richard Lowry

Mailed, delivered or electronic sealed proposals envelopes/packages must be clearly marked on the outside with the following description:  
"Proposal for the RFP for the Planning, Building and Enforcement COTS application  
DO NOT OPEN BEFORE 5:00 PM on September 4, 2015"

#### **1.4 Bidder Responsibility & Questions**

It is the Bidder's responsibility to ensure its complete understanding of the requirements and instructions set out in this RFP. In the event that clarification is required, Bidders should submit questions via e-mail to [nebooth@gov.bm](mailto:nebooth@gov.bm).

We ask that you clearly state in the subject line "Questions regarding RFP for the Planning, Building and Enforcement COTS application". The deadline for questions is 5:00pm Atlantic Standard Time (AST), on August 12, 2015.

The questions will be answered by the Department of Planning no later than 5:00 PM Atlantic Standard Time (AST), on August 21, 2015. Questions and answers will be posted (without identifying the source) on the [www.opmp.gov.bm](http://www.opmp.gov.bm) website under Procurement Notices.

#### **1.5 Bid Validity**

Proposal shall remain valid and open for a period of ninety (90) calendar days after the date of the deadline proposal submission.

#### **1.6 Cost of Proposal**

The Bidder shall bear all costs associated with the preparation and submission of their proposal and the Ministry of Home Affairs and the Department of Planning will in no case be responsible or liable for these costs, regardless of the conduct or outcome of the bidding process.

#### **1.7 Evaluation Process**

The proposal submitted to the Department of Planning will be evaluated in a three-stage process with the second stage resulting in a short list of potential Bidders utilizing the enclosed Evaluation Matrix. (Section F)

The second stage is a qualitative evaluation of each proposal by the evaluation panel members followed by moderation and consolidation resulting in a short list of potential Bidders.

- **Proposal Responsiveness (Stage 1--Pass/Fail):**

Required documentation: Proposals will be reviewed to determine if all required documentation was included with proposal submittal as described.

***Proposals that fail to contain the required documents with their cost proposals will be disqualified from further consideration.*** Please refer to Annex 2 Checklist of Required Documentation for further information.

- **Proposal Review and Technical Evaluation (Stage 2)**

The proposals will be evaluated against the general criteria and weighted scores will be applied as described in the Evaluation Matrix.

The Department may seek written clarification from any or all Bidders in order to better understand and evaluate the proposed solution. This process may not be used as an opportunity to submit missing documentation or to make substantive revisions to the original proposal.

Subsequently, client references will be contacted for the short listed Bidders and financial checks will be completed.

- **Presentations/Oral Interviews (Stage 3)**

Finalists (proposals determined to have scored in the competitive range) will be invited to present oral presentations for the purpose of introducing key members of the evaluation team, and allowing the Department to fully understand the Bidder's ability to meet the evaluation criteria. Oral presentations will not be scored separately. Instead the Department may modify proposal scores (on the Evaluation Matrix) and resulting rankings based on the oral presentation.

The primary contact identified in the proposal must be the lead presenter in the oral presentation.

## **1.8 Evaluation Criteria**

The proposal will be evaluated under the following high level criteria headings and weighting as noted in the table below.

### **A) Experience and Capability (50%)**

- Proposer's approach to performing the contract or meeting the requirements of the RFP
- Responsiveness to solicitation requirements, terms, conditions, readability, neatness, clarity, etc.
- Proposal is logical, reasonable and professional
- Understanding of the project
- Methodology Used for the Project
- Implementation/orientation/start-up procedures and efforts
- How soon service/work can begin
- Proposer's experience with previous government projects
- Management - evaluates proposer's approach to managing the effort
  - Management Plan for the Project
  - Financial strength and stability
  - Relevant experience, technical qualifications, skills and qualified key personnel assigned to the project and resource availability
  - Existing or prior customer satisfaction
  - Quality assurance plan

- Training, reports and documentation
- Problem resolution process
- Has satisfactory record of integrity, judgment and performance
- Relevant experience similar in size, scope, and complexity

**B) Financial Analysis (30%)**

After the technical evaluation, the financial proposals will be given special evaluation and will be scored in accordance with the criteria outlined.

**C) Social, Environmental and Economic criteria (20%)**

- Percentage of workforce that are Bermudian and/or BEDC registered
- Financial checks will be performed with the Office of the Tax Commissioner, the Department of Social Insurance and the Accountant General's Department to ensure the bidder is not delinquent in their accounts.

**1.9 Selection Process:**

- a. The review and evaluation of responses to the RFP will be performed by Department of Planning and their designees (the "Team").
- b. The Team will review the Proposals received in response to this RFP, and select a maximum of three (3) Bidders to interview.
- c. Shortlisted Bidder (s) client references will be contacted and financial checks will be completed.
- d. Bidders responding to this RFP will be interviewed by the Team. If selected for an interview, Bidders will be contacted to schedule a time and location for the interview. Interviews may be on-site at the Department of Planning offices, via a web-meeting, or by teleconference.

**1.10 Acceptance and Authority to cancel this RFP**

The Department of Planning will not be obliged to accept the lowest price or any of the proposals submitted. Each Bidder acknowledges and agrees that the Department of Planning will have no liability or obligation to any Bidder, except to the party, if any, awarded a contract by the Department of Planning in its sole discretion and the Department of Planning shall be fully and forever released and discharged of all liability and obligation in connection with this Request for Proposal (RFP). The Department of Planning reserves the right to cancel this RFP without any obligation or reimbursement to Bidders.

**1.11 Amendments**

At any time prior to the close of the RFP, the Department of Planning may alter, amend, delete or add to, in whole or in part, any terms or provisions of this RFP. The Department of Planning may modify, amend or revise any provision of this RFP or issue an addendum at any time. Any such modification or amendment, revision or addenda will be distributed on the procurement notice web site: [www.opmp.gov.bm](http://www.opmp.gov.bm) under procurement notices. It is the responsibility of the potential vendors to monitor this site for additional information.

## 1.12 Bidder Submission Requirements

Each Proposal submitted must include the following in order to be accepted by the Department of Planning. The information outlined below is the minimum submittal requirement. Bidders may supply additional information if desired. The Proposal, at a minimum, shall consist of:

### A. Letter of Submission that:

- i. Identifies the submitting vendor;
- ii. Includes a statement indicating which bidder, if multiple vendors are proposing jointly, intends to act as primary contact for proposal evaluation questions and the delivery and maintenance of all post-proposal correspondence;
- iii. Includes a brief statement of the bidder's understanding of the work to be done and a summary of the proposed definition of services to be delivered.
- iv. Identifies the name, title, address, telephone number, fax number, and e-mail address of each person authorized by the bidder to contractually obligate the vendor;
- v. Identifies the name, title, address, telephone number, fax number, and e-mail address of the bidder contact; including a list of the company principals;
- vi. Includes a statement stating that the person signing the transmittal letter is authorized to legally bind the vendor;
- vii. Is signed by the person(s) authorized to contractually obligate the organization; and
- viii. Acknowledges receipt of amendments to this RFP, if any.
- ix. Provide the following bidder background:  
Bidders should provide answers to the following for **each** company in the partnership (if this proposal is suggesting that the provisioning of the requirements in the RFP will be met by multiple companies).
  1. How long has your company been in existence?
  2. Does your company owe outstanding taxes to the Bermuda Government?
  3. Does your company have any pending litigations?
  4. How many clients does your company currently service?
  5. What other services are provided by your company?
  6. Does your company have experience working with Government entities?
  7. Describe your company's proposed Service Level Agreement
  8. Describe the process for providing status information and problem resolution timeframes
  9. State how soon you can commence working on this project

### B. Proposed Definition of Services to be delivered – a description of the services the bidder will deliver and a proposal which defines the work breakdown structure, phases, deliverables, costs and acceptance criteria.

- i. **Proposed Approach** – a description of the proposed approach for the delivery of the tasks outlined in the Description of Work section of this document.
- ii. **Company Information** – including vendor qualifications, as well as background information on the resources proposed to work on the project.

- iii. **Project Plan and Methodology** – this will show how the vendor proposes to approach the project. The vendor must include as part of its approach a detailed Gantt chart developed in Microsoft Project 2007®, or a comparable product, that contains all major project tasks of the proposed approach. The Gantt chart must include at a minimum:
- a. Detailed tasks and dependencies
  - b. Task start and end dates
  - c. Milestones - including interim approvals by the Client and delivery dates of the documentation
1. Bidder must describe the project methodology they will use for the project. This segment of the proposal should establish the appropriateness and value of the proposed methodology in relation to this RFP.
  2. Bidder should identify the potential risks and problems which, in their experience, occur on projects of this type. In addition, the vendor should identify steps that can be taken by the vendor or by the Government of Bermuda to avoid or mitigate these problems and steps to be taken should the problem occur.
  3. Activities should be incorporated in the project plan to reduce the occurrence, severity and effect of events or situations that can compromise attaining any project objective. This description should convey the level of detail involved in each activity and identify the significant milestones that occur in each area.
  4. Responsibilities of the Government of Bermuda – Involvement required of the Government of Bermuda in terms of staff, office space, training facilities, computer hardware, networking, cabling, or other supplies, etc.
  5. A list of the final documents, including technical reports, drawings, and tables to be delivered as final output, should be included here.

**C. Technical Proposal (Section C)**

- Bidders must provide details of up to three contracts completed by your company which are similar to the works described herein
- Each Proposal must include three references. Each reference shall include the name of the organization and the name, title and telephone number of a contact person within the organization. Bidders may also include written letters from the clients with their contact information.
- Provide a reference from your banking institution as to your standing with the bank.
- Please indicate whether your company has filed for bankruptcy within the last two years or whether the company is currently insolvent.
- Bidders must provide Bermuda company Payroll Tax ID number and Social Insurance number (if applicable)
- Indicate the total number of employees working at the company and the number and percentage of Bermudian employees.
- The names of all proposed resources you intend to use for the project.

**D. Financial Proposal/Pricing and Signature Sheet (Section D)**

Each Proposal must include a completed Financial Proposal Form (Section D) as provided with authorized signature. Pricing should include all recurring and non-recurring costs that the Department of Planning will incur over the term of the Contract with the Bidder, including startup costs, installation fees, telecommunication costs, labor, travel, overtime, supplies, shipping, fees, services and any other expense as may be required or necessary to successfully provide the needed services.

**E. Contract Language Terms and Conditions**

Each proposal must include a bidder's sample contract. The contract of the successful bidder will be vetted by the Government of Bermuda Attorney General's office for review and comment.

**F. Completed and executed Proposal Submission Form and Certificate of Confirmation of Non Collusion (Section E)**

**1.13 Bidder's Responsibility & Clarification Questions**

It is the Bidder's responsibility to ensure its complete understanding of the requirements and instructions set out in this Invitation to Bid.

**1.14 Insurance**

The Bidder shall submit evidence with his Proposal, such as a copy of a certificate or a letter from his insurers, confirming Insurance has been retained for the amount shown in the Schedule and for the duration of the Works.

**1.15 Proposal Exceptions:**

Exceptions that a Bidder may have to any of the requirements found in this RFP must be fully explained and outlined in the Bidder's submitted response to the RFP in a separate section under the heading "Proposal Exceptions".

**1.16 Assumptions:**

The Bidder shall list any assumptions made in formulating this RFP in a separate section under the heading "Assumptions". Any questions about the specifications of this RFP should be addressed during the Bidder question period ending August 12, 2015 through the contact [nebooth@gov.bm](mailto:nebooth@gov.bm) prior to submitting an RFP response.

**1.17 Additional Information:**

Additional information not specifically required as a part of the RFP may be provided in a separate section under the heading "Additional Information".

**1.18 Agreement to Specifications:**

By submitting a Proposal, respondent agrees to the specifications presented in this RFP except as noted in respondent's Proposal Exceptions. The Contract between the Department of Planning and the selected Bidder will include and fully incorporate this RFP and the selected Bidder's response.

## **Section 2 Award of Contract**

### **2.1 Award Criteria**

The Department of Planning will award the Contract to the Bidder whose proposal has been determined to be substantially responsive to the RFP documents and who, in the opinion of the Department of Planning, has offered the best proposal taking into consideration the price, the Bidder's capability and available resources to carry out the Contract effectively and the Bidder's schedule. This may not be the lowest proposal received.

### **2.2 Right to accept any proposal and to reject any or all proposals**

- a) The Department of Planning does not bind themselves to accept the lowest price of any Proposal submitted and reserves the right to reject any Proposal and to annul the bidding process and reject all Proposals, at any time prior to Award of Contract, without thereby incurring any liability to the affected Bidder, or Bidders or any obligations to inform the affected Bidder or Bidders of the grounds for the Department of Planning's action.
- b) The Department of Planning may declare the Bidding process void when it is evident that there is a lack of competition or there has been collusion. All Proposals may be rejected if substantially higher than the budget.
- c) Any Contractual agreement(s) resulting from this RFP will be finalized with the most advantageous Bidder(s) as per schedule Sequence of Events or as soon thereafter as possible. The dates are subject to change at the discretion of the Government of Bermuda. In the event mutually agreeable terms cannot be reached with the apparent most advantageous Bidder in the time specified, the Government of Bermuda reserves the right to finalize a contract with the next most advantageous bidder(s) without undertaking a new procurement process.

### **2.3 References**

Before awarding any contract, the Department of Planning reserves the right to require the Bidder to submit such evidence of qualifications as it may deem appropriate. This evidence may be concerning financial, technical and other qualifications as well as the relevant experience and skills of the Bidder.

### **2.4 Notification of Award**

- a) Prior to the expiration of the period of Bid Validity prescribed by the Department of Planning, the Department of Planning will notify the successful Bidder by email or facsimile confirmed in writing by registered letter that their proposal has been accepted and the written contract document will be forthcoming.
- b) The Department of Planning will promptly notify the unsuccessful Bidders once the contract has been signed by the successful contractor.
- c) Upon awarding and acceptance of a contract for goods or services, a Government of Bermuda Purchase Order will be issued as a guarantee to pay. Payments will be authorized on invoices 30 days after receipt of the contracted goods or services. All responses must include any proposed variations to these standard payment terms for discussion and negotiation.

d) Registration should be concurrent with the commencement of business activities and the consultant will be provided with instruction to complete the relevant returns. The Contracting department must advise the consultant of the requirement to register whether they are Bermuda Resident or not. The consultant is required to register with the following:

1. Tax Commissioner as required by Payroll Tax Act 1995
2. Social Insurance as required by the Contributory Pension Act 1970
3. Consultants are responsible for their own health insurance

## **2.5 Agreement**

The Department of Planning will negotiate an Agreement with the selected Bidder. If an Agreement cannot be successfully negotiated between the Department of Planning and the selected Bidder within a reasonable time as determined by the Department of Planning, the Department of Planning may attempt to negotiate an Agreement with an alternate qualified Bidder.

## **2.7 Negotiations**

Bids are to be submitted as firm and irrevocable and open for acceptance at any time during the period specified. The Department of Planning reserves the right, at its discretion, to enter into discussions or to negotiate with any bidder as it sees fit, or with another bidder or bidders concurrently. Following the analysis of the bid, the Department of Planning may ask the low three or four bidders to attend an interview to review the submission and to provide an additional itemized breakdown for various aspects of the work. Subject to these interviews, final evaluation will be made based on pricing and responses and evaluation of the responses in the interview. In no event will the Department of Planning be required to enter into discussions or negotiations on similar or other terms or offer any modified terms to any other bidder prior to entering into a contract. The Department of Planning shall incur no liability to any bidder as a result of these discussions, negotiations or modifications. Such negotiations are not to affect the irrevocability of a bid as specified, which irrevocability is to remain in full force and effect, until such time as the bid is accepted or the bid expires or the Department of Planning and the bidder mutually agree in writing on any modified terms as a condition to the Department of Planning's acceptance of this bid.

## **2.8 Timeframe of negotiations**

The Department of Planning intends to conclude negotiations within thirty (30) days commencing from the date the Department of Planning invites any bidder or bidders to enter negotiations. A bidder invited to enter into negotiations should therefore be prepared to provide requested information in a timely fashion and to conduct its negotiations expeditiously.

## **2.9 Basis of Award**

- i. Award will be based on the overall highest ranked proposal score in accordance with technical and financial evaluation criteria and who have submitted all mandatory requirements.

- ii. Should the Department of Planning in its sole discretion determine that a secondary award is required; the award will be to the second highest ranked proposal.
- iii. Should either of the selected bidder fail to provide post award documents as required, the Department of Planning, in its sole discretion, may withdraw the award recommendation, and select the next highest ranked proposal for award.
- iv. The Department of Planning reserves the right to accept an offer in full, or in part, or to reject all offers.

**2.10 Application Delivery**

The solution is considered delivered when the application is running in production mode and signed off by the Department of Planning and ITO.

**2.11 Ownership**

All data is owned expressly by the Government of Bermuda. The vendor can only take possession of relevant Government of Bermuda data when granted by the Project Authorities, and only for the purposes of data conversion, testing, and direct deployment tasks. Use of the data for purposes other than this is strictly prohibited and requires written authorization by the Government of Bermuda.

Bidder should provide an explanation of ownership, licensure, and resale expectations of the application, source code, derivatives of source code, or Terms and Conditions.

**END OF INSTRUCTIONS TO BIDDERS**

## 2 SECTION B – STATEMENT OF REQUIREMENTS

### 2.1 Project Assumptions and Constraints:

The requirements anticipate new privacy legislation currently being drafted by the Government of Bermuda that may impact the ultimate hosting solution to be proposed as well as restrict the flow of confidential information. Please provide multiple geographical hosting location options in your proposal.

### 2.2 High Level Functionality

The Government envisions that the solution will support the following high-level goals:

1. The Department is seeking a Planning solution with web capabilities for internal and external stakeholders.
2. The application will provide for the following high level features:
  - Case Management with rich data collection
  - Document Management with the capability of drag and drop functionality
  - Workflow Management with assignment capabilities
  - Photo and Plans Management
  - GIS Integration
  - MS Suite Integration
  - Appeals database Integration
  - Land Tax and Land Title Integration
  - Website that allows for a customer self service portal with integration to the main platform
  - Letter and form creation and generation
  - Code Maintenance (COTS solution)
  - Report creation and generation
  - Fee Schedule and Payment

### 2.3 Current State

The current application is written in VB6 and is composed of three main applications: Client applications in the Planning Department, Kiosk Applications for public visitors; and a website.

- The Client Applications is made of five Visual Basic Win32 applications:
  - **Main Application**  
The central application is where all the other applications can be launched from. It manages all planning applications, board meetings, inspections, building permits, complaints, subdivisions, etc.

- **Map Guide Map Tool**
- This tool is used to show all geographical data over a detailed map of Bermuda
  
- **Search Tool**  
This tool is used to execute complex queries to find all information concerning applications, appeals, objections, complaints, and other legal aspects
  
- **Parcel Viewer**  
This tool is mainly used for displaying historic data concerning land parcels and associated applications
  
- **File Attachments**  
This tool is used for managing all file attachments to applications
  
- Kiosk Applications:
  - **Kiosk Map Guide Map Tool**  
This is the kiosk version of the Map Guide Map Tool
  
  - **Kiosk Search Tool**  
This is the kiosk version Search tool
  
- Website:  
The Department of Planning website which can be accessed at [www.planning.gov.bm](http://www.planning.gov.bm)

The applications data is currently hosted on a SQL Server 2012 database. All reports are currently created and maintained using Crystal Reports 10.

The Government of Bermuda currently maintains an ArcGIS Sever, v.10.2.1. The department utilizes the ESRI suite of ArcGIS software v.10.2.1.

## 2.4 Departmental Processes

The department is seeking a workflow solution, as such; we ask that bidder review the “as is” workflow samples provided in the following annexes to ensure that the product can accommodate these sample processes. It is understood that these processes may need to change somewhat to accommodate the new application.

- Development Applications Process Annex 6
- Development Plan Annex 7
- Enforcement Process Annex 8
- Forward Planning Process Annex 9
- Building Permits Process Annex 10
- Building Inspections Process Annex 11

**2.5 Requirements:**

Please ensure you review **all** of the requirements. For ease of your submission, please also see Annex 3 (Requirements Working Document). Bidders are required to note whether they can or cannot meet the requirement, acknowledge that they have understood the requirement and provide a reference to the description location within their written response for each requirement which is indicated in the working documents within Annex 3.

Bidders are encouraged to also indicate which value-added services or factors that they are willing to provide or include without affecting the core cost proposal that they are submitting.

Requirement #	REQUIREMENT
1.00	The application will be customizable to create fields for data input
2.00	The application will provide a mapping tool
3.00	The application will be parcel based system (rather than an address based system), on which all site visit photos, applications/permits/complaints/subdivisions/Listed Buildings, etc would be linked.
4.00	The application will allow for data validation on fields
5.00	The application will allow for the selection of dates for items such as date application received, registered, consult sent, date objection received, notification of objection, etc.
6.00	The application will allow for some fields to be editable
7.00	The application will provide for a text field for common names for land parcels (editable)
8.00	The application will provide for a combo box for zonings for land parcels (editable)
9.00	The application will allow for the attachment of recording agreements in PDF format (editable)
10.00	The application will allow for a text field to note restrictions (editable)
11.00	The application will allow for a text field for subdivision history for land parcels (editable)
12.00	The application will have a search function
12.10	The application will have an intelligent search such as type-ahead features (i.e. user types in search query and the results display for selection by the user. EX. Google Search
12.20	The application will have search criteria for Application #, address via the map tool, owner's name, road/address, Parish, Building Proposal, common names i.e. planning location
12.30	The search function will query parcel sets using the mapping tool

Requirement #	REQUIREMENT
12.40	The search function will provide details on applications associated with parcel sets
13.00	The application will allow for a field with a calendar applet to denote Advertising date
14.00	The application will allow for any advert to be removed from the advertisement list - Word format
15.00	The application will allow for areas for text comments to be input in each step of the process
16.00	The application will have a filter capability
16.10	The application will filter cases by Parish and by Case Officer
17.00	The application will allow for comments to be hidden or marked "private"
18.00	The application will validate locations entered into the application (against the address server)
19.00	The application will provide a visual tree representation of subdivisions showing the parent parcel and subdivisions within that parent parcel.
20.00	The application will accept scanned documents
21.00	The application will have the ability to manage the objections workflow during a draft development plan public consultation
22.00	The application will have the ability to create location plans
23.00	The application will have the ability to calculate fees
24.00	The application will allow for the creation and use of electronic signatures
25.00	The application will provide for an audit trail of all activities in the case file
26.00	The application will allow for a field for property tax record number
27.00	The application will allow for a case to be created for parcel records without an application being submitted
28.00	The application will allow for a field for parcel (parcel of land) number which will be the unique identifier
29.00	The application must create parcel numbers (sequentially)
30.00	The application will allow for retrieval and linking of sections of Section 34 agreements to a parcel
31.00	The application will allow for retrieval and linking of sections of zoning orders to a parcel
32.00	The application will allow for retrieval and linking of Listed Buildings information to a parcel
33.00	The application will allow for the attachment of PDF's and Word documents to the file
34.00	The application will allow for the ability to "drag and drop" documents to a file

Requirement #	REQUIREMENT
35.00	The application will allow electronic files to be attached to case files (including photos, scanned document, emails and attachments from emails)
36.00	The application will allow for storing of form templates
37.00	The application will track all correspondence and activity
38.00	The application will allow for storing and retrieval of drawing and image uploads
39.00	The application will time stamp all uploads
40.00	The application will allow for an escalation process to a higher staff level if there is exception handling (i.e. missed deadline)
41.00	The application will include a map interface
42.00	The application will permit search results to be mapped visually
43.00	The application will allow for printing files and labels for the hard copy file
44.00	The application will permit custom fields to be added
45.00	The application will include fields (Text and combo boxes) to capture a submissions proposed use
46.00	The application will capture floorspace data by each floor (either in sq feet or sq meters)
47.00	The application will allow for Planner approval of floorspace data
48.00	The application will provide a combo box for the status of the application
49.00	The application will provide a function that will display the status of the application
50.00	The application will provide a combo box for the status of the permit
51.00	The application will provide a function that will display the status of the permit
52.00	The application will allow for the selection (multi select combo box) of the planning policies that are applicable to the case file
53.00	The application will allow for a type of tracking mechanism for locating the physical hard copy file
54.00	The application will allow for a listed building (buildings of architectural or historical interest that have restrictions for major repairs, renovation, maintenance and restoration) to be assigned to a parcel
55.00	The application will allow for a combo box for the status of an inspection
56.00	The application will provide a function that will display the status of the inspection
57.00	The application will allow for a combo box for the status of a complaint
58.00	The application will provide a function that will display the status of a complaint
59.00	The application will allow for the cancellation of an inspection request
60.00	The application will allow for the recording of a site visit using a date applet
61.00	The application will allow for a combo box selection for an address (against the Official Address list)

Requirement #	REQUIREMENT
62.00	The application will link planning submissions to existing tax records (i.e. assessment number)
63.00	The application will link building permits to existing tax records (i.e. assessment number)
64.00	The application will display the status of the progress of an application in visual form for both internal and external (public) users
65.00	The application will allow for a customizable dashboard for each external user which will display a list of applications submitted, alerts and follow ups
66.00	The application will allow for 50 concurrent users for the staff members and counsultee's application
67.00	The application will allow for 50 concurrent users for the web application
68.00	The application will be scalable to 100 users for the staff members and counsultee's
69.00	The application will be scalable to 400 users for the web application
70.00	The application will provide for an acceptable response time when loading a UI
71.00	The application should be designed for a minimum availability of 99.1%
72.00	The application will have user define roles
73.00	The application will allow for a user role of System Administrator
74.00	The application will allow the System Administrator to assign users
75.00	The application will allow the System Administrator to terminate users
76.00	The application will allow the case files to be re-assigned to users
77.00	The application will have security permissions defined by user
78.00	The application will provide limited access (security permission) to legal advice and complaints
79.00	The application will provide security for viewing the audit trail of all activities in the case file
80.00	The application will provide ability to control fields available for public view
81.00	The application will allow for a specific user group (i.e. admin) access to edit customized correspondence templates
82.00	The application will provide a log on for Consultees with permission to comment on a file
83.00	The application will allow for the creation of business rules
84.00	The application will allow for business rules for assignment of a case file
85.00	The application will allow the assignment of case files to users (inspectors) based on business rules inclusive of geographic area
86.00	The application will send communication to the appropriate users based on business rules
87.00	The application will send email notifications based on key dates or activity

Requirement #	REQUIREMENT
88.00	The application will allow for an alert to the appropriate parties depending on key dates or activities
89.00	The application will allow for the creation of business rules regarding the completion of an on line Application
90.00	The application will allow for business rules regarding the printing of Certificate of Completion
91.00	The application cannot be submitted without an address/location.
92.00	The application will allow for the creation of customized correspondence
93.00	The application will allow for auto-generated letters
94.00	The application will allow for sending auto generated email notifications to users based on business rules
95.00	The application will send notifications to managers regarding exception handling
96.00	The application will send electronic notices and letters to applicants, public and other Gov't employees outside of the user group
97.00	The application will have the ability to send email correspondence to the surrounding addresses using the GIS component
98.00	The application will allow for external parties to sign up for correspondence
99.00	The application will have a "contacts" database to house names, addresses, phone numbers, role/type of contact, etc.
100.00	The application will send electronic consultation requests
101.00	The application will send a notification to assigned inspector of any uploads to a submission
102.00	The application will generate letters when defined workflow is reached
103.00	The application will have the ability to print copies of letters
104.00	The application will store a copy of the notices and letters to the appropriate case file
105.00	The application will store drawing and image uploads on a separate server due to storage size constraints (if applicable)
106.00	The application must be implemented by April 1, 2016. A detailed Project Plan indicating how the solution provider will meet this requirement should be provided.
107.00	The Vendor must identify the physical location of the data centres or equivalent facilities from which the services will be provided. Specifically, the Vendor must identify the country and the province/state for: <ul style="list-style-type: none"> <li>-the location of the facility that will be the primary service delivery site</li> <li>- the location of the facility that will the secondary service delivery site</li> <li>- the location of any facility other than the Primary and Secondary site in which the Government of Bermuda data will be stored.</li> </ul>

Requirement #	REQUIREMENT
108.00	<p>The Vendor should provide their corporate Privacy Protection Plan or equivalent privacy policy. Their Privacy Protection Plan should address the following key components:</p> <ul style="list-style-type: none"> <li>-Provision for applying the Privacy Protection Plan to subcontractors, contractors and employees;</li> <li>- Provision of personal information protection and privacy agreements with subcontractors, agent, employees and contractors;</li> <li>-Provisions to ensure that personal information is protected against such risks as loss or theft, as well as unauthorized access, disclosure, transfer, copying, use, modification or disposal;</li> <li>- Provisions accommodating GOB sovereignty over the data and information;</li> <li>- Maintaining the accuracy, privacy and integrity of Personal Information;</li> <li>- Provisions safeguarding Personal Information through its lifecycle;</li> <li>- Provision of access controls governing authorized personnel with access to personal information and databases;</li> <li>- Provision of records of and proof of any government information destruction;</li> <li>- Provision for the contractor, its subcontractors, agents, and employees are prohibited from the accessing, communication, transfer, disclosure, retention, processing and management of Personal Information including without limitation the use of such information to derive benefits for the contractor without the written permission of GOB; and</li> <li>- Provision for notification of privacy breaches: provision of notification processes and records associated with any personal information disclosure or breaches throughout the information lifecycle during all stages of planning, development, testing implementation and service.</li> </ul>
109.00	The application will display the history of area for use records for land parcels
110.00	The application will display the history of listed historic building listing assessments
111.00	The application will display the history of development activity on land parcels
112.00	The application will display the history of listed historic building development activities
113.00	The application will allow for integration with MS Outlook and MS Office Suite (Plug and Play)
114.00	The application will create individual case files
115.00	The application will allow for the ability to track pre-consultations, vetting prior to the creation of an application number
116.00	The application will assign a unique number to each case file that will be the application number
117.00	The application will generate an Application number
118.00	The application will automatically generate an Application number that is sequential and has a unique identifier to denote which type of Application it is with a prefix to denote the Application type

Requirement #	REQUIREMENT
119.00	The application will allow for the sequential Application number to be reset annually every January 1st
120.00	The application will manage illegal development complaints
121.00	The application will allow for the linking of a parcel number for each application or permit
122.00	The application will allow for the input of multiple addresses to be for each case file
123.00	The application will link addresses for land parcels numbers
124.00	The application will record the area for use records for land parcels
125.00	The application will allow for appeals to be tracked
126.00	The application will record listed historic building listing assessments
127.00	The application will record listed historic building development activities
128.00	The application will record listed historic building committee agendas and decisions
129.00	The application will display the history of listed historic building committee agendas and decisions
130.00	The application will allow for an area for notes regarding pre-consultation
131.00	The application will allow for an area for notes regarding vetting
132.00	The application will provide a combo box for a case status
133.00	The application will track zoning objections under a separate case number
134.00	The application will track zoning resolutions under a separate case number
135.00	The application will track listed historic buildings under a separate case number
136.00	The application will record a Director's approval
137.00	The application will display a Director's approval
138.00	The application will include conservation setback details (areas of special environmental value i.e. protected areas because they possess natural features with environmental value)
139.00	The application will allow for adding conservation management plans
140.00	The application will allow for electronic plan review, including comment, overlay and compare and editing of electronic plans
141.00	The application should have a Forward Planning component to allow development monitoring
142.00	Solution should include a robust public user web search component for application/permit information
143.00	The application will have the ability for data to be accessible via a website
144.00	The application will provide for mobile users
145.00	The web application will allow for data entry on the mobile version

Requirement #	REQUIREMENT
146.00	The web application will have a scalable design allowing for viewing on varying types of mobile devices
147.00	The application shall be responsive and adapt the layout of the user's viewing environment by resizing the design to the device being used (PC or Mac)
148.00	Solution should provide a holding area for electronic submissions for applicants to review before submitting, and then for staff to vet before registering.
149.00	The web application will include search function
150.00	The web application search function will query application status
151.00	The web application search function will query application decisions
152.00	The web application search function will query board minutes
153.00	The web application search function will query performance metrics
154.00	The web application will include a map function
155.00	The web application will provide a function that will display the status of the application
156.00	The web application will allow for the completion of an online planning Application
157.00	The web application will allow for the attachment of documents that support the planning Application
158.00	The web application will allow for citizens to book inspections
159.00	The web application must be compatible with all current browsers
160.00	The web application will provide for a remote web application for Departmental personnel
161.00	The web application will allow for the retrieval of drawings and images
162.00	The web application will pre-fill a case file in the internal application
163.00	The web application will allow for online payments (current Gov of Bermuda payment gateway is First Data)
164.00	The web application will have a fee schedule with dynamic calculations
165.00	The web application will allow for the printing of a receipt with the cost center listed
166.00	The application will allow for the creation of form templates (both electronic and web enabled)
167.00	The application will allow for the creation and printing of forms (i.e. certification of completion permit, vetting sheets, occupancy certificates, inspection requests)
168.00	The application will allow for the creation and printing of letter templates
169.00	The application will allow for document management with versioning
170.00	The application will have the ability to store correspondence from other agencies

Requirement #	REQUIREMENT
171.00	The application will allow for the attachment of emails to the file and preserve the email in its original state
172.00	The application will allow for a letter to be watermarked "Copy"
173.00	The application will provide rich text formatting
174.00	The application will allow for reports and attachments in PDF to be generated and prepared for board meetings
175.00	The application will include Board Report attachments for approved proposals
176.00	The application will include Board Report attachments for refused proposals
177.00	The application will allow for workflow management for Building Control, Development Management, and Enforcement
178.00	The application will allow for input of processes
179.00	The application will track each step in each process for Key Performance Indicators
180.00	The application will allow for automatic (based on business rules) and manual tracking of events related to various activities on the file
181.00	The application will provide a history record for events that have occurred on the case file
182.00	The application will track inspection requests
183.00	The application will track permit revisions for Building and Development applications
184.00	The application will track the pre-consultation activity
185.00	The application will track the vetting activity
186.00	The application will allow for a customizable dashboard for each internal user which will display assignments, alerts and follow ups
187.00	The application should have a component to manage meetings for all Boards and Committees that fall under Planning's remit, including setting agendas, preparing Planner's reports, notifying members, preparing minutes and issuing decision letters/objector's notifications by letter and email..
188.00	The application will have the ability to generate reports
189.00	The application will issue building permits
190.00	The application will generate daily inspection schedules
191.00	The application will generate inspection history reports
192.00	The application will report on Key Performance Indicators throughout each of the processes
193.00	The application will provide a report that collects all applications received within a certain date range
194.00	The application will report on all cases where there is a Director's approval
195.00	The application will allow for the creation and printing of a Parcel Sheet (compiled report including address server)

Requirement #	REQUIREMENT
196.00	The application will allow for reports to be exported to Excel
197.00	The application will allow for reports to be created in a PDF format
198.00	The application will allow for custom queries using expression builders to generate unique reports
199.00	The application will include a filter function to generate specific reports
200.00	The application will provide a report or a view of the audit trail of all activities in the case file
201.00	The application will provide a report for Advertisement reports
202.00	The application will provide a report for Development Applications Committee (Agenda and Minutes)
203.00	The application will provide a report for Development Applications Board (Agenda and Minutes)
204.00	The application will allow for the selection of certain documents to be attached to Board Reports
205.00	The application will allow for consultation requests to be printed
206.00	The application will auto-generate reports based on stored data
207.00	The application will provide a workload report for inspections
208.00	The workload report will provide the # of requests, # of requests by inspector, # of inspections completed by inspector
209.00	The application will provide a report of inspection requests on all open permits
210.00	The application will provide an inspection report that indicates if other permits are in open status or if there are complaints in open status for that site
211.00	The application will provide an Enforcement Report on the number of complaints
212.00	The application will provide for a journal report outlining all payments
213.00	The application will integrate with Geocortex (preferred solution) or ESRI GIS for both the Department and Public applications
214.00	The application will integrate with Official Address list Oracle db
215.00	The application will integrate with an Appeals
216.00	The application will integrate with an Objections Tribunal database
217.00	The application will integrate with Land Valuation Tax records (GIS based property tax db)
218.00	The web portal application will integrate with JD Edwards Enterprise 1 for payment of fees associated with the planning processes
219.00	The web portal application will integrate with the Government of Bermuda's payment gateway
220.00	The application will allow for a table to accommodate planning statements/policies whereby the Planner can multi select planning statements/policies from a combo box

Requirement #	REQUIREMENT
221.00	The application will allow for a table to accommodate Section 34 agreements
222.00	The application will allow for a table to accommodate zoning orders
223.00	The application will allow for a table for Listed Buildings
224.00	The application will allow for a table for on line payments
225.00	The vendor will complete a conversion from the existing application to the new application on records with current building permits and create a shell file. The data is in SQL and there are approximately 10,000 records. There are approximately 20 (alpha numeric) fields for each record.
226.00	The vendor will provide training for the staff members and consultee's. The vendor should provide a number of training options: onsite, online along with self-service options such as video "how-to" clips; printed/pdfs
227.00	The application will manage elevator inspections and certificates
228.00	The vendor will complete a conversion of the elevator inspections data to the new application. The data is in SQL and there are approximately 602 records

**END OF DESCRIPTION OF WORKS/ SPECIFICATIONS**

**3 SECTION C – TECHNICAL PROPOSAL FORMS**

Bidder shall complete the attached appendices to facilitate their submission of response to this RFP in addition to the Bidder Submission requirements stated in Section A. For ease of completion, these forms are also available in Annex 4 (Technical Proposal Forms).

**Please note: You MUST identify the Prime Contractor. Both the Prime Contractor and Sub Contractor must each complete the sections below.**

Acknowledgement letter	1 page
Response Submissions Forms	6 pages

**Acknowledgement letter**

***Prime and Subcontractor(s) must each complete these forms***

**(Note: all sheets form part of the proposal)**

I have reviewed all of the general information and specifications in the RFP, have contacted the Department of Planning regarding any needed clarifications, and submit this Proposal with a full understanding of the specifications and study requirements. Any exceptions to the requirements and terms of the RFP are clearly identified and outlined in a separate section clearly marked "Proposal Exceptions" as a part of my submittal.

If selected by the Department of Planning as the Bidder, I agree to abide by the terms and conditions specified in this RFP.

**SIGNED:**

(Signature)

---

(Block letters)

---

**ON BEHALF OF:**

(Company)

---

**DATED:**

---

**RESPONSE SUBMISSION FORMS**

(Note: all sheets form part of the proposal)

**Provision of technical services for the Department of Planning**

***Prime and Subcontractor(s) must each complete these forms***

(Note: all sheets form part of the Proposal)

1. We confirm that we, the undersigned, are conducting business as a proper legal entity and are not delinquent in making payments for outstanding debts for Government receivables such as Social Insurance contributions, Payroll Tax and Public Works (formerly Works & Engineering) fees.
2. We confirm that we have submitted a bona fide Tender, intended to be competitive and we have not fixed or adjusted our Price by or under or in accordance with any agreement or arrangement with any other Bidder.
3. Having examined the RFP, the conditions of contract, statement of requirements, submission forms inclusive for the execution of the Services, we, the undersigned, offer to provide the Services in accordance with the Instructions to Bidders, and all enclosed documents (herein called the *RFP Documents*).
4. We acknowledge that the Proposal Forms are part of our proposal submittal.
5. We undertake, if our Tender is accepted, to commence the Services as soon as is reasonably possible after the receipt of written notice to commence, and to provide the Services comprised in the *Contract Documents* for the duration.
6. We confirm that our Tender shall remain open for acceptance by the Government of Bermuda for a period of **90 calendar days** from the date of this undertaking and we shall not withdraw this Tender during this period.
7. Unless and until a formal Agreement is prepared and executed this Tender, together with your written acceptance thereof, shall constitute a binding contract between us.
8. We understand that the Government of Bermuda is not bound to accept the lowest or any tender that may be received.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2015

(Name) \_\_\_\_\_

(Signature) \_\_\_\_\_

Duly authorized to sign tenders for and on behalf of:

(Firm) \_\_\_\_\_

(Address) \_\_\_\_\_

**Organizational Company Data/Bank Reference/Client References/Financial Stability**

(Note: all sheets form part of the proposal)

Name of Bidder: \_\_\_\_\_

Total number of employees: \_\_\_\_\_

Head Office Address: \_\_\_\_\_

Local Office Address: \_\_\_\_\_

Duly Authorized Official: \_\_\_\_\_

Representative for the Purposes:  
Hereof, Email, Telephone and Facsimile Number \_\_\_\_\_

Description of Proponent: *(fill in where applicable (a, b, c or d))*

(a) Incorporated Company (Name) \_\_\_\_\_

(Please ensure copy of Incorporation of Company is included with response)

Date and Place of Incorporation \_\_\_\_\_

Names of Principal Officers

President \_\_\_\_\_

Vice-President \_\_\_\_\_

Secretary \_\_\_\_\_

Treasurer \_\_\_\_\_

Names of Principal Shareholders

\_\_\_\_\_

\_\_\_\_\_

**RESPONSE SUBMISSION FORMS**  
(Note: all sheets form part of the proposal)

**Company Name:** \_\_\_\_\_

(b) Partnership or affiliate #1 (Name) \_\_\_\_\_

Date and Place Established \_\_\_\_\_

General or Limited Partnership \_\_\_\_\_

Principal Partners, Country of Residence \_\_\_\_\_

Total number of employees \_\_\_\_\_

(c) Partnership or affiliate #2 (Name) \_\_\_\_\_

Date and Place Established \_\_\_\_\_

General or Limited Partnership \_\_\_\_\_

Principal Partners, Country of Residence \_\_\_\_\_

Total number of employees \_\_\_\_\_

(d) Sole Proprietorship (Name) \_\_\_\_\_

Date and Place Established \_\_\_\_\_

Name and Address of Proprietor \_\_\_\_\_

Total number of employees \_\_\_\_\_

(e) Other (Please provide adequate details if none of the above)

\_\_\_\_\_  
\_\_\_\_\_

If the Bidder is a subsidiary of, affiliated with or associated with other organizations, please provide details:

\_\_\_\_\_  
\_\_\_\_\_

**Insurance details:**

Workers Compensation Insurance carried: BD\$ \_\_\_\_\_

Professional Indemnity Insurance carried: BD\$ \_\_\_\_\_

Commercial Grade Liability Insurance carried: BD\$ \_\_\_\_\_

**Company Name:** \_\_\_\_\_

Bermuda Company Payroll Tax # Prime (if applicable): \_\_\_\_\_

Bermuda Company Social Insurance # Prime (if applicable): \_\_\_\_\_

Bermuda Company Payroll Tax # Sub 1 (if applicable): \_\_\_\_\_

Bermuda Company Social Insurance # Sub 1 (if applicable): \_\_\_\_\_

Bermuda Company Payroll Tax # Sub 2 (if applicable): \_\_\_\_\_

Bermuda Company Social Insurance # Sub 2 (if applicable): \_\_\_\_\_

**Bank Reference:**

Please attach a bank reference letter for **both** the Prime and Sub Contractor(s) with your submission.

**Sample Contract:**

Please attach a sample contract. Each proposal must include a bidder's sample contract. The contract of the successful bidder will be vetted by the Government of Bermuda Attorney General's office for review and comment.

**RESPONSE SUBMISSION FORMS**

(Note: all sheets form part of the proposal)

***Prime and Subcontractor(s) must each complete these forms***

**Company Name – \_\_\_\_\_**

Please provide a list of all staff who will be assigned to the assignment (add more lines as needed) & provide CVs.

Name	Position

Client and Reference

1. The following service contracts have been satisfactorily completed in the last two (2) years for the persons, companies or authorities indicated:

	Year	Type of Work	Contract Amount	Location, for Whom Performed Services
(a)				
(b)				
(c)				

2. The following person may be contacted for information concerning the contract work listed above (list a reference for each contract named):

	Name	Title	Address	Telephone
(a)				
(b)				
(c)				

**RESPONSE SUBMISSION FORMS**  
(Note: all sheets form part of the proposal)

***Prime and Subcontractor(s) must each complete these forms***

**Company Name** – \_\_\_\_\_

Financial Stability

Yes I/ we confirm that, the undersigned are conducting business as a proper legal entity and are not delinquent in making payments for outstanding debts for Government of Bermuda receivables such as Social Insurance contributions and Payroll Tax.

**SIGNED:**

(Signature)

\_\_\_\_\_

(Block letters)

\_\_\_\_\_

**ON BEHALF OF:**

(Company)

\_\_\_\_\_

**DATED:**

\_\_\_\_\_

#### **4 SECTION D – FINANCIAL PROPOSAL**

Bidder shall complete Annex 1 (Financial Proposal Form) to facilitate their financial submission in response to this RFP.

**5 SECTION E - Certificate of Confirmation of Non-Collusion**  
***Prime and Subcontractor must each complete these forms***

For ease of completion, these forms are also available in Annex 5.

**Notes for the tenderer/Bidder**

The essence of Open Tendering is that the Government of Bermuda shall receive bona fide competitive Tenders from all persons tendering. In recognition of this principle, all companies submitting a tender will be required, by way of the signature of the Company Principle, state their agreement to the statements below, which indicates that the tender has been submitted without any form of collusion.

The Certificate of Confirmation of Non-Collusion is a mandatory requirement from ALL Bidders and subcontractors. Any bids submitted which do not include a signed copy of the Certificate will be wholly rejected and will not be included in the evaluation process.

If it is later found that the undertakings made below have been breached at any stage of the process, the Bidder will be expelled from the process immediately. In the event that this is discovered after a contract award, legal action may be taken against the Bidder and/or any party involved in the matter.

False submissions may also exclude the Bidder, and any other person or company involved in collusion, from bidding for future contracts tendered by the Government of Bermuda.

**Certificate of Confirmation of Non-Collusion**

**Confirmation of non-collusion**

I/We certify that this is a bona fide Tender, intended to be competitive and that I/We have not fixed or adjusted the amount of the Tender or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

I/We confirm that we have not received any additional information, other than that contained within the tender pack, or supplementary information provided to all Bidders.

I/We also certify that I/We have not done and undertake that I/We will not do at any time any of the following acts:

- (a) communicating to a person other than the tender administrator the amount or approximate amount of my/our proposed Tender (other than in confidence in order to obtain quotations necessary for the preparation of the Tender for insurance) or
- (b) entering into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any Tender to be submitted; or
- (c) offering or agreeing to pay or give or paying any sum of money, inducement, gift /hospitality or valuable consideration directly or indirectly to any person in relation to this tender.

Signed

(1) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

(2) \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_

For and on behalf of \_\_\_\_\_

**Prime and Subcontractor must each complete these forms**

**Confirmation of Completion**

We confirm having completed all parts of this form; and received and complied with all addenda (if any) as follows:

Insert addenda #

**SIGNED:**

(Signature)

\_\_\_\_\_

(Block letters)

\_\_\_\_\_

**ON BEHALF OF:**

(Company)

\_\_\_\_\_

(Mailing address)

\_\_\_\_\_

\_\_\_\_\_

(Email)

\_\_\_\_\_

(Contact #'s)

(t) \_\_\_\_\_ (c) \_\_\_\_\_

DATE:

\_\_\_\_\_

## 6 SECTION F - Evaluation Matrix

ITEM	CRITERIA	SUBMISSION REQUIREMENT	SCORE	NOTES:
<b>0.0</b>	<b>Quality of Proposal:</b>			
0	Did the bidder provide all required documentation? Is the RFP readable and clear?	See Checklist of Required documentation - Annex 2		
<b>1.0</b>	<b>Experience &amp; Capability:</b>			
1.1	Does the bidder clearly demonstrate the ability to deliver the requirements of the tender?	Method Statements		
1.2	Did the bidder offer evidence of experience with projects of a similar scale?	Referenced projects		
1.3	Has the bidder performed well on previous Government projects?	Referenced projects - Government		
1.4	Is the bidder able to complete the work within the required timescales?	Project Schedule or Service Level Agreement including milestones for deliverables - end date 31 March 2016		
1.5	Does the bidder state that they have sufficient, suitably experienced resources available?	Contractor's staff information / resumes		
1.6	Were the bidders referees positive about their experience of working with the contractor/supplier, and would they use them again?	References		References checked after shortlist
<b>1T</b>	<b>Total Score - Section 1 (50%)</b>		<b>0</b>	
<b>2</b>	<b>Financial Analysis</b>			
2.1	Tender price (include all costs)	Form of Proposal		
<b>2T</b>	<b>Total Score - Section 2 (30%)</b>		<b>0</b>	
<b>3</b>	<b>Social, Environmental &amp; Economic criteria</b>			
3.1	Percentage of workforce that are Bermudian and/or BEDC registered			
3.2	Does the bidder owe monies to the Office of the Tax Commissioner, the Department of Social Insurance or the Accountant General's Department	Payroll Tax and Social insurance numbers		Financials checked after shortlist
<b>3T</b>	<b>Total Score - Section 3 (20%)</b>		<b>0</b>	
			<b>0.0</b>	

**7 SECTION G – Statement of Work**

Upon selection of the successful vendor, a statement of work will be required prior to the commencement of the project.

A sample Statement of Work has been provided for your review.

Please see Annex 12 for a Sample Statement of Work