Circuit Rider Training Program for drinking water and wastewater operations in the Quebec Cree Communities

Request for Professional Services

Terms of Reference

January 17, 2018
# TABLE OF CONTENTS

## INTRODUCTION

## PART 1: GENERAL REQUIREMENTS

1. General Conditions
2. Compliance with Regulations and the Terms of Reference
3. Presentation of the Proposal
4. Work Team, Sub-trades and Consortiums
5. Selection of a Proponent
6. Ownership of the Documents and Confidentiality
7. Contract between the Cree Nation Government and the Proponent
8. Insurance
9. Payments
10. Selection Criteria

## PART 2: PROJECT SCOPE

1. Background
2. Mandate
   2.1. Description
   2.2. Deliverables
   2.3. Schedule
   2.4. Map of Cree Communities in Northern Quebec
   2.5. Population and Drinking Water Source information per Community
   2.6. Pricing Grid
INTRODUCTION

The Cree Nation Government, through the Department of Capital Works and Services (CWS), is requesting the services of a professional firm related to the drinking water and wastewater operations within the nine (9) Cree Nation communities in Northern Quebec.

Specifically, a circuit rider training program is required for the nine (9) communities for a one year period, commencing April 1, 2018 and terminating March 31, 2019.

The professional services required during this period are:

• Punctual visits to each community by an experienced and certified Circuit Rider Trainer (CRT) in order to:
  o Review, monitor, and evaluate technical protocols related to the operation of the local drinking water and waste water facilities;
  o Develop, train staff and enforce and apply preventative maintenance and risk management procedures;
  o Discuss and implement new regulations and protocols;
  o Take inventory of materials and ensure maintenance of stock;
  o Take inventory of human resources and level of training of local water and waste water operators;
  o Conduct an inspection of facilities, and produce a report on the conformity of all facilities in use;
  o Provide comments on any safety issue needing quick intervention regarding possible risks for the operators or for the population using the water and waste water facilities.

• A 24-hour/ 7 days per week phone assistance, in order to offer assistance in any trouble-shooting during day-to-day operations and emergency situations.

PART 1: GENERAL REQUIREMENTS

1. GENERAL CONDITIONS

All proponents are considered to have received and used the present document to prepare their proposal. These Terms of Reference (TOR) will be part of the contract to be signed with the selected proponent.

Questions concerning these Terms of Reference (TOR) should be addressed by email to:

procurement@cngov.ca

Questions will be accepted until Wednesday February 7, 2018.

The transmission of proposals shall respect the following:

• 3 paper copies and one digital copy of the final proposal must be delivered, in a sealed envelope, to:
  Cree Nation Government
  Attn: Guillaume Bédard
  Re: Circuit Rider Training Program
  Department of Capital Works and Services
  270 Prince Street, Suite 202
  Montreal, QC H3C 2N3
The proposal must be received before 11:00 am on February 9, 2018. The proposals will be opened and evaluated only after this date.

It is the proponent’s responsibility to make sure their proposal has been delivered at the proper address within the time delay. The Cree Nation Government may, at its sole discretion, reject any and/or all proposals received.

2. COMPLIANCE WITH REGULATIONS AND THE TERMS OF REFERENCE

The selected proponent’s work must comply with all pertinent local, regional, provincial and federal laws, by-laws and regulations.

If the proponent’s proposal or work omits or contradicts any of the requirements of these Terms of Reference, the Terms of Reference will prevail unless a written notice is issued by the contact person of the Cree Nation Government.

In the case of a dispute, the documents shall be used with the following priority:
   a. Contract (if a formal contract is signed)
   b. Terms of Reference
   c. Proposal from the proponent
   d. Any appendices to the proponent’s proposal

3. PRESENTATION OF THE PROPOSAL

To be considered for selection, a proposal must include:
   a. A brief presentation of the key persons of the work team and of their specific qualification in relation of this project. This section must mention who will be the contact person and project manager for the firm;
   b. A detailed breakdown of the lump sum fees and the expenses. Details of costs should be presented in a matrix form and costs for each step must correspond to the descriptions included in the work plan; Travel expenses to be enumerated separately and will not form part of the evaluation
   c. Experience of the firm related to Circuit Rider Training Services in remote areas;
   d. A schedule of events (site visits, preliminary reports and final report).

A proponent, because of his experience and local knowledge, may want to make suggestions for the scope of the required work. In such a case, the proponent must present a proposal which corresponds with the requirements of these Terms of Reference so that the proposal may be compared with those of other proponents. Additional suggestions to the scope, procedures or methodologies, and corresponding costs, may be included in an appendix.
4. WORK TEAM, SUB-TRADES AND CONSORTIUMS

The Cree Nation Government expects that the professionals who will work and complete the mandate will be those mentioned in the proposal. Any change must be submitted in writing for the approval of the Cree Nation Government. The Cree Nation Government can accept or refuse this change.

If a proponent wishes to use other professionals or do a partnership with other professionals during the project, these must be presented in the proposal unless specifically requested by the Cree Nation Government.

A proponent who intends to form a consortium to present a proposal must advise the Cree Nation Government prior to sending their proposal. It is then the Cree Nation Government’s choice to accept or refuse the consortium.

5. SELECTION OF A PROPOSENT

The selected proponent will be notified in writing by the Cree Nation Government within two weeks following the deadline to submit proposals. The proposal presented by the proponents is considered to remain valid for a period of 60 days. If no mandate is awarded within this period, the proponent may retrieve their proposal if they wish to do so.

6. OWNERSHIP OF THE DOCUMENTS AND CONFIDENTIALITY

A proponent may borrow documents from the Cree Nation Government or from other entities to complete its mandate. In such cases, these documents remain the property of the original owner and must be returned before the end of the mandate.

All information gathered from the Cree Nation Government remains confidential and cannot be used for purposes other than to complete the mandate.

Documents produced at the end of the mandate are the property of the Cree Nation Government and may not be distributed or duplicated without a written approval from the Cree Nation Government.

7. CONTRACT BETWEEN THE CREE NATION GOVERNMENT AND THE PROPOSENT

The Cree Nation Government may wish to sign a contract with the selected proponent for this mandate. If such is the case, the Cree Nation Government will propose a contract form.

However, the selected proponent may initiate work once a written notice or a purchase order is issued. If no specific contract is signed, the written notice or purchase order to award the mandate, the Terms of Reference and the proponent’s proposal are considered to be the contract between the Cree Nation Government and the proponent.
8. **INSURANCE**

For the duration of the services, the selected proponent must maintain civil and professional liability insurance issued by a qualified recognized insurer for a minimum amount of $2,000,000.

9. **PAYMENTS**

Progressive payments will be made for the duration of the project. Invoices must be presented taking into account the progression of the project. No holdbacks will be made on progressive or final payment unless, in the opinion of the Cree Nation Government and advisors, the selected proponent has not met all of its contractual obligations.

Invoices must be sent to the attention of Mr. Guillaume Bédard, Coordinator of Engineering Services for the Capital Works and Services department of the Cree Nation Government, and if acceptable, will be paid within 45 days after they are approved. A short progress report should be included or sent at the time of invoicing to give precisions on the work completed.

Invoices must be accompanied with a progress or site report as appropriate per milestone.

A payment schedule against milestones should be provided in the offer of services.

Costing for Hourly work of the team should be provided (will not be considered in the evaluation, just as a reference)

No change to the project scope entitles the proponent to additional fees unless a written agreement is issued prior to the moment these fees were engaged.
10. SELECTION CRITERIA

Proposals submitted in response to this request will be examined by a Selection Committee.

Examination will be based on the following criteria for each specific lot:

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Maximum Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Competence and experience of the proposed project team</td>
<td>20</td>
</tr>
<tr>
<td>2.</td>
<td>Conformity of proposal to the requirements of the Terms of Reference</td>
<td>20</td>
</tr>
<tr>
<td>3.</td>
<td>Competence and experience of the Firm in related projects</td>
<td>20</td>
</tr>
<tr>
<td>4.</td>
<td>Cost of services (based on lump sum amount for the fees, excluding the travel expenses)</td>
<td>40</td>
</tr>
</tbody>
</table>

**TOTAL** 100

Details on Criteria (but not limited to):

1. Competence and experience of the proposed project team:
   a. Expertise in the field of Circuit Rider Training;
   b. Sufficient availability for the project, and guarantee of available back-up personnel in the event that the primary personnel is no longer capable of fulfilling the mandate;
   c. Sufficient support within the organization.

2. Conformity of proposal to the requirements of the Terms of Reference:
   a. Sufficient understanding of the works to be undertaken;
   b. Capacity to offer services and suggest alternatives;
   c. Detailing of Report Scheduling (field visits, preliminary reports, final reports).

3. Competence and experience of the Firm in related projects:
   a. Years of service;
   b. Size of the firm;
   c. Similar projects executed by the proposed team;

4. Cost of Service Score to be based on the following structure:

\[
\left(\frac{\text{Lowest Price offer of service}}{\text{Cost of offer of Service}}\right) \times 40 = \text{Score}
\]

Once the examination is completed, the Selection Committee will make a recommendation to the Director of Capital Works and Services of the Cree Nation Government. The Selection Committee has no obligation to justify its decision other than to the Director of Capital Works and Services of the Cree Nation Government.
PART 2: PROJECT SCOPE

1. BACKGROUND

In order to ensure the quality of the drinking water and wastewater within the nine (9) local Quebec Cree Nations, the Capital Works and Services (CWS) department is seeking to implement a circuit rider training program for a 1 year period, commencing April 1, 2018 and terminating March 31, 2019. Renewal of the mandate into 2019-2020 may be possible, depending on the availability of financial resources and the successful completion of the initial mandate.

2. MANDATE

2.1. Description

The Cree Nation Government seeks to retain the services of a firm with the specialized knowledge and resources available to render the following services:

- Two (2) visits to each of the nine (9) community by a certified, English speaking, Circuit Rider Trainer (CRT) in order to:
  - Review, monitor, and evaluate technical protocols related to the operation of the local drinking water and waste water facilities;
  - Enforce and apply preventative maintenance and risk management procedures;
  - Discuss and implement new regulations and protocols;
  - Conduct inspection of all water and waste water related facilities, and produce a final report on the conformity of all facilities in use;
  - Take inventory of material resources and ensure maintenance of stock required for the routine operations of the water and waste water operators;
  - Evaluate human resource capacity and level of training per community, and identify additional training requirements for fiscal year.

- A 24-hour/ 7-day-per-week phone assistance call line, in order to offer trouble-shooting assistance during day-to-day operations and in emergency situations. A schedule must be provided as to who should be called when an emergency happens throughout the mandate.

- Support for the organization and preparation of operators meetings (2 per year)
  - Provide training workshop adapted to the knowledge of operators
  - Help in organizing event, venue, tour, etc.

- In close collaboration with local staff, prepare and deliver for each community the end of year reporting documents required by provincial legislation for drinking water and wastewater
- Leak detection evaluation and recommendation for each community (water usage per capita, last campaign date, water meter follow-up, etc.)

- For every community, prepare an inventory of all plans and manuals. Provide assistance to the community in acquiring missing documents.

2.2. Deliverables

1. Meeting minutes of the kick-off meeting between the Cree Nation Government and the selected firm;

2. Site Visit reports following each community visit (18 reports total). Information to be included:
   - Date and location of each visit;
   - Local water operator personnel encountered during visit;
   - Name and type of facilities visited and inspected;
   - Type of information and protocols reviewed;
   - Suggested improvements to protocol, maintenance and management;
   - Conformity of facilities;
   - General observations;
   - Etc.

3. A Preliminary Report will include, per community:
   - Evaluation of technical protocols;
   - Evaluation of preventative maintenance and risk management, including recommendations for improvements;
   - Report on the conformity of all water-related facilities based on the inspections during community visits.
   - Evaluation of inventory of material resources and stock required to carry out general duties of water operators.
   - Evaluation of human resource capacity and level of training of water operators, and recommendations for additional training.

   The Preliminary version of the report is due March 13 2019. The Cree Nation Government will review the document and provide feedback prior to the production of the Final Report.

4. A Final Report (due March 31 2019) to include all items contained in the Preliminary Report in a more polished format, including the feedback received from the Cree Nation Government.

5. Call Log of all calls made to the call assistance phone line, including information such as:
   - Date of call;
   - Name of caller;
   - Issues discussed;
   - Solutions proposed;
   - Follow-up required;
   - Etc.
2.3. **Schedule**

The mandate will last one year. Work will commence on April 1, 2018 and terminate on March 31, 2019. Key milestones include:

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Planning:</strong>&lt;br&gt;A kick-off meeting will be planned between the Cree Nation Government Department of Capital Works and Services and the selected firm to answer any questions and provide any needed guidance.</td>
<td>March 2018</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Performance:</strong>&lt;br&gt;Data Collection and Site Visits.&lt;br&gt;Two site visits are to be carried out in each of the nine communities to meet the community water and waste water operators and conduct visits, with at least 1 operator, to the local drinking water and waste water facilities.&lt;br&gt;It is mandatory to dedicate 5 days per visit, excluding transportation.&lt;br&gt;It is the responsibility of the firm to schedule all meetings and visits with the local community representatives and the Cree Nation Government, if required. The firm must provide the Cree Nation Government with a proposed schedule of meetings and site visits taking into account the scope of the work to be done.</td>
<td>Suggested dates:&lt;br&gt;- 1st visit per community: Summer/Fall 2018&lt;br&gt;- 2nd visit per community: January 2019</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Reporting:</strong>&lt;br&gt;Final data compilation and report preparation to take place in the early spring 2019 to allow for the deliverance of:&lt;br&gt;- Site Visit reports (18) following each community visit.&lt;br&gt;Site Visit reports should be submitted to CWS within a reasonable delay following each community visit (4 weeks).&lt;br&gt;- Preliminary Report by March 13 2019;&lt;br&gt;- Final Report by March 31 2019.&lt;br&gt;- Call Log by March 31 2019.</td>
<td>March 2019</td>
</tr>
</tbody>
</table>
2.4. Map of Cree Communities in Northern Quebec

Cree of Quebec also known as the East Cree or James Bay Cree.

Sources: Grand Council of the Crees, La Municipalité de la Baie James, Susanne Hilton (Waswanipi Forest), Bill Seeley, Dan Carpenter Jr, Adrian Tanner
2.5. **Population and Drinking Water Source information per Community**

The name, population, and type of source of drinking water of the nine (9) communities are as follows:

<table>
<thead>
<tr>
<th>Name</th>
<th>Population</th>
<th>Drinking Water Supply (Quantity) and water treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whapmagoostui</td>
<td>1670¹</td>
<td>Underground wells (4). No treatment apart from disinfection. Operation by Whapmagoostui.</td>
</tr>
<tr>
<td>Chisasibi</td>
<td>4875</td>
<td>Surface water (La Grande river). Complete water treatment plant (Pulsator)</td>
</tr>
<tr>
<td>Wemindji</td>
<td>1445</td>
<td>Surface water (Maquatua River). Complete water treatment plant (Ultrafiltration and nanofiltration membranes)</td>
</tr>
<tr>
<td>Eastmain</td>
<td>865</td>
<td>Underground wells (56 through vacuum collection). and surface water (Beaver Creek and reservoir). Complete water treatment plant (Dynasand, green sand filtration and disinfection. Chloramination for residual disinfection</td>
</tr>
<tr>
<td>Waskaganish</td>
<td>2210</td>
<td>Surface water (Rupert River). Complete ultrafiltration membrane water treatment plant.</td>
</tr>
<tr>
<td>Nemaska</td>
<td>760</td>
<td>Underground wells (2). No water treatment.</td>
</tr>
<tr>
<td>Mistissini</td>
<td>3525</td>
<td>Underground wells (2). No water treatment.</td>
</tr>
<tr>
<td>Ouje-Bougoumou</td>
<td>740</td>
<td>Underground wells (2). No water treatment.</td>
</tr>
<tr>
<td>Waswanipi</td>
<td>1760</td>
<td>Underground wells (2, soon 3). No water treatment for now but filtration may be added in 2018.</td>
</tr>
</tbody>
</table>

*Note ¹: Combined Cree and Inuit population.*
2.6. **Waste Water Treatment and number of pumping stations per Community**

The number of waste water pumping stations operated by the Community and the number of lagoons (all communities use, for waste water treatment, aerated facultative lagoons) of the nine (9) communities are as follows:

<table>
<thead>
<tr>
<th>Name</th>
<th>Pumping Stations</th>
<th>Waste Water Treatment Plant. Number of lagoons and notes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whapmagoostui</td>
<td>None</td>
<td>3 lagoons operated by the neighbour Northern village Kuujjuarapik.</td>
</tr>
<tr>
<td>Chisasibi</td>
<td>8</td>
<td>3 lagoons.</td>
</tr>
<tr>
<td>Wemindji</td>
<td>1</td>
<td>3 lagoons.</td>
</tr>
<tr>
<td>Eastmain</td>
<td>3</td>
<td>3 lagoons.</td>
</tr>
<tr>
<td>Waskaganish</td>
<td>3</td>
<td>3 lagoons.</td>
</tr>
<tr>
<td>Nemaska</td>
<td>3</td>
<td>3 lagoons.</td>
</tr>
<tr>
<td>Mistissini</td>
<td>3</td>
<td>4 lagoons.</td>
</tr>
<tr>
<td>Ouje-Bougoumou</td>
<td>1</td>
<td>2 lagoons.</td>
</tr>
<tr>
<td>Waswanipi</td>
<td>2</td>
<td>2 lagoons. Screening and SMBR system upstream of lagoons.</td>
</tr>
</tbody>
</table>

2.7. **Pricing Grid**

The pricing grid is to be presented as follows:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fees</td>
<td>$</td>
</tr>
<tr>
<td>2</td>
<td>Others (to be detailed)</td>
<td>$</td>
</tr>
<tr>
<td>3</td>
<td>Travel expenses</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>TOTAL (1+2 will be used for Evaluation)</td>
<td>$</td>
</tr>
</tbody>
</table>

Each section of the pricing grid must be further detailed and one table per community must be included.