



Request for Proposal (RFP)

FOR ASSESSMENT SERVICES

SUMMARY:

The Town of Canmore (the Town) is soliciting proposals from qualified accredited assessors/assessment companies to submit proposals to provide assessment services to the Municipality.

REFERENCE NUMBER:	FIN2025-002
CLOSING DATE:	FRIDAY SEPTEMBER 26, 2025
CLOSING TIME:	14:00:00 Mountain Time Zone
DATE ISSUED:	WEDNESDAY SEPTEMBER 3, 2025
NOTE:	RESPONSES WILL NOT BE OPENED PUBLICLY

Table of Contents

1.0	INSTRUCTIONS FOR RESPONDING TO THIS REQUEST FOR PROPOSALS	3
2.0	GENERAL CONDITIONS OF RESPONSE	4
2.1	PURPOSE OF THE REQUEST FOR PROPOSAL (RFP).....	4
2.2	SUBMISSION OF RESPONSE TO THE RFP	4
2.3	NO COMMITMENT	5
2.4	LIMITATION OF LIABILITY	5
2.5	ACCEPTANCE OR REJECTION.....	5
2.6	QUESTIONS AND CLARIFICATIONS	6
2.7	DISCREPANCIES IN NUMBERS	6
2.8	CONFIDENTIALITY AND ACCESS TO INFORMATION ACT	6
2.9	COST OF PREPARATION	7
2.10	OWNERSHIP OF SUBMISSIONS	7
2.11	CLARIFICATION FROM PROPONENTS.....	8
2.12	PROPONENT PERFORMACE	8
2.13	LENGTH OF AGREEMENT.....	8
2.14	FORM OF CONTRACT.....	8
2.15	PROFESSIONAL SERVICES TERMS AND CONDITIONS.....	8
2.16	STAFF CHANGES	9
2.17	NON-ASSIGNMENT	9
2.18	DEPOSITS	9
2.19	TERMS OF PAYMENT	9
2.20	INSURANCE AND WORKERS' COMPENSATION BOARD REQUIREMENTS	9
2.21	INDEMNIFICATION	10
2.22	CANADIAN FREE TRADE AGREEMENT.....	11
2.23	DEBRIEFING	11
3.0	PROJECT OVERVIEW AND SCOPE.....	12
3.1	RFP DEFINITIONS	12
3.2	PROJECT DESCRIPTION/DESCRIPTION OF NEED	12
3.3	SCOPE OVERVIEW/SCOPE OF SERVICES	12
3.4	ANTICIPATED SCHEDULE.....	14
4.0	RESPONSE REQUIREMENTS AND EVALUATION CRITERIA.....	16
4.1	FORMAT AND OUTLINE OF RESPONSES	16
4.2	PROPOSAL SUBMISSION REQUIREMENTS	16
4.3	EVALUATION PROCESS.....	18
4.4	PROPONENT SHORTLIST	18



4.5 CONFIDENTIALITY OF EVALUATION 18

4.6 RFP SCHEDULE 19

5.0 SIGNATURE AND WAIVER SHEET 20

6.0 APPENDIX A – PROPOSED FIXED PRICE FORM..... 22

7.0 APPENDIX B – HOURLY RATES 23

1.0 INSTRUCTIONS FOR RESPONDING TO THIS REQUEST FOR PROPOSALS

- 1.1.1** Closing Date and Time: Proposals must be received not later than **14:00:00 hours Mountain Time Zone** (Canmore local time) on the 26th Day of September 2025.
- 1.1.2** Proponents shall submit their proposal to the Town of Canmore (The Town) by email to the attention of Chelsey Gibbons, Manager of Finance, at chelsey.gibbons@canmore.ca.
- 1.1.3** Electronic RFP responses are to be in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission.
- 1.1.4** RFP Contact Person:
For clarification or additional information, Proponents shall **only** contact the person listed below.
Chelsey Gibbons, Manager of Finance
Email – chelsey.gibbons@canmore.ca
See Section 2.0, item 2.6 below for additional information for Questions and Clarifications.
- 1.1.5** The Town may in its sole discretion disqualify responses that do not meet the formatting and other criteria set out in Section 4.0 of this RFP.
- 1.1.6** Responses must be in English.
- 1.1.7** Pricing submissions shall be stated in Canadian dollars with Goods and Services Tax (GST) extra.
- 1.1.8** Each Proponent is solely responsible for ensuring that its response is received at the specified address (email address) by the specified closing date and time. Strict adherence to the closing date and time will be maintained, and unless the deadline date is extended by issue of Addendum, all responses received after this time and date will be returned unopened.
- 1.1.9** This Request for Proposals is not a tender and The Town does not intend for the laws of competitive bidding to apply.

END OF SECTION 1.0

2.0 GENERAL CONDITIONS OF RESPONSE

2.1 PURPOSE OF THE REQUEST FOR PROPOSAL (RFP)

The Town is issuing this Request for Proposal (RFP) to select an accredited assessor for assessment services.

The Town reserves the right to modify the terms or cancel the RFP process at any time.

2.2 SUBMISSION OF RESPONSE TO THE RFP

2.2.1 By submitting a response to this RFP, each Proponent accepts its terms and conditions. In addition, by submitting its response each Proponent waives all claims, rights, demands and the benefit of any provisions of any statute, rule of law or regulation that might adversely affect the rights of The Town under this RFP.

2.2.2 Each Proponent shall make full disclosure of any actual or potential conflict of interest arising from any existing business or personal relationships with any of the following (each, a “Conflicted Person”): (i) any employee of The Town; (ii) any member of the Town of Canmore Town Council (councillor); (iii) any board or committee member; (iv) any family member of any such employee, councillor or board/committee member; or (v) any business entity controlled by or otherwise not at arm’s length to any one or more of any such employee, councillor, board/committee member or family member.

Without limiting the foregoing, details should be provided of any direct or indirect pecuniary interest of any Conflicted Person in the supply of the services contemplated by this RFP.

Disclosure of any such actual or potential conflict of interest shall be made in writing with the Proponent’s response.

2.2.3 This RFP and any contracts subsequently entered into as a result hereof shall be governed by the laws of the Province of Alberta and the laws of Canada applicable therein. The courts of the Province of Alberta shall have exclusive jurisdiction over this RFP and any contracts entered into as a result hereof.

2.2.4 Proposal documents must be completed in accordance with the requirements of the Request for Proposal documents and no amendment or change to proposals will be accepted after the closing date and time.

2.2.5 All documents submitted by Proponents in response to this RFP are to remain the property of The Town.

2.2.6 Proposals shall be irrevocable for sixty (60) days following the closing of the RFP and the proposals shall be retained by The Town.

2.2.7 Proposals shall be signed by an authorized signatory of the Proponent using the Signature and Waiver Sheet in Section 5.0. If the Proponent is an incorporated company, the corporate seal of the Proponent shall be affixed or a certified true copy of a resolution of the corporation naming the person(s) in question as authorized to sign agreements on behalf of the corporation shall be attached to the proposal.

Proponents who are sole proprietorships or partners shall sign their RFP response in such a way as to irrevocably bind the Proponent in an authorized manner.

2.3 NO COMMITMENT

- 2.3.1** No commitment on the part of The Town shall exist under this RFP unless and until the Proponent receives official written confirmation from The Town that it has been selected to complete the work.

2.4 LIMITATION OF LIABILITY

- 2.4.1** The Town will have no liability to any person or entity for any damages, including, without limitation, direct, indirect, special or punitive damages, arising out of or otherwise relating to this RFP, the Proponent's participation in this RFP process or The Town's acts or omissions in connection with the conduct of this RFP process. This limitation applies to all possible claims by a Proponent, whether arising in contract, tort, equity, or otherwise, including, without limitation, any claim for a breach by The Town of a duty of fairness or relating to a failure by The Town to comply with the terms set forth in this RFP.

2.5 ACCEPTANCE OR REJECTION

- 2.5.1** The Town reserves the right to reject any or all responses. Without limiting the generality of the foregoing, The Town may reject any response which it deems:
- a) is incomplete, obscure, irregular, unrealistic or noncompliant;
 - b) has erasures, ambiguities, inconsistency or corrections; or
 - c) fails to complete, or provide any information required by, any provision of this RFP.

Further, a response may be rejected on the basis of The Town's understanding of the Proponent's past record of work, its general reputation, its financial capabilities, the completion schedule or a failure to comply with any applicable law.

The purpose of The Town is to obtain the most suitable responses to the Project and to further the interests of The Town and what it wishes to accomplish in carrying out the Project. Therefore, The Town has the right to waive any irregularity or insufficiency or noncompliance in any response submitted and to accept the response or responses which it deems most favourable to its interests or to reject all responses and cancel the RFP.

In addition to any rights identified elsewhere in this RFP, The Town reserves the right to:

- a) reject any and all responses;
- b) add, delete or change the terms of this RFP at any time prior to the specified closing date and time;
- c) during the evaluation period, seek clarification of any Proponent's response, including consequential amendments, or any additional information from any Proponent;
- d) accept or reject, in whole or in part, any response without giving any reason;
- e) have any documents submitted by the Proponent reviewed and evaluated by any party, including independent Consultants;

- f) cancel the RFP process without penalty at any time for any reason; and
- g) negotiate and enter into an agreement with any Proponent notwithstanding any noncompliance by the Proponent's response with any requirement of this RFP.

The Town is the sole and final judge with respect to the selection of any Successful Proponent as a result of this RFP process.

All Proponents submitting a response to this RFP will be advised of the results of the RFP process by email or regular mail. Please allow at least four weeks for responses to be evaluated by The Town.

2.6 QUESTIONS AND CLARIFICATIONS

- 2.6.1** Procedural or technical questions shall be submitted in writing and should include references to a specific section and item number.
- 2.6.2** Dependent upon their nature, comments or answers will be returned via email or through an addendum should the information be applicable to all Proponents.
- 2.6.3** Amendments to this RFP will be valid and effective only if confirmed by written addenda. Addenda may be issued during the proposal response period. All addenda become part of the agreement and receipt must be confirmed in the Proponents proposal submission.
- 2.6.4** Any addenda documents will be issued by the same method that this RFP was issued.
- 2.6.5** It is the Proponent's responsibility to clarify the interpretation of any item of this RFP a minimum of 72 hours prior to the stated closing date and time by contacting The Town's designate (as above).

2.7 DISCREPANCIES IN NUMBERS

- 2.7.1** In the event of a numerical discrepancy or error in a Proposal, the written number will prevail.
- 2.7.2** In the event of pricing extension errors, the unit price will apply.

2.8 CONFIDENTIALITY AND ACCESS TO INFORMATION ACT

- 2.8.1** All information including, without limitation, any technology of a proprietary or novel nature which is disclosed to a Proponent by The Town or a third party as a representative of The Town (which information, in addition to the confidentiality requirements hereunder, will be kept confidential by the Proponent in accordance with the terms of its disclosure by such third party) or which is otherwise obtained by the Proponent in connection with this RFP process, other than that which is common knowledge or within the public domain, is the confidential property of The Town and must not be disclosed by the Proponent, except to duly authorized representatives of The Town. Such confidential information or property is not to be employed other than in connection with responding to this RFP unless otherwise duly authorized by The Town in writing. These confidentiality provisions will remain binding obligations on each Proponent following the conclusion of this RFP process until The Town reasonably determines that such confidential information referred to herein has become part of the public domain (other than by disclosure or use prohibited herein) and releases the Proponent from its confidentiality obligation. This

requirement does not prohibit any Proponent from complying with an order to provide information or data issued by a court or other authority with proper jurisdiction or to act to correct or report a situation which the Proponent may reasonably believe to endanger the safety or welfare of the public.

- 2.8.2** The applicant acknowledges that any information or documents provided by it to The Town may be released pursuant to the provisions of the *Access to Information Act*. This acknowledgement shall not be construed as a waiver of any right to object to the release of any information or documents.
- 2.8.3** The Town acknowledges that a Proponent's response may contain information in the nature of a Proponent's trade secrets or commercial, financial, labour relations, scientific or technical information of or about a Proponent. The Town agrees that portions of responses to this RFP which are provided in confidence will be protected from disclosure to the extent permitted by law. The Town is bound by the *Access to Information Act*, as amended from time to time, and all documents submitted to The Town will be subject thereto. Each Proponent must identify appropriate parts of its response or other documents submitted to The Town as confidential and specify what harm could reasonably be expected from its disclosure; however, The Town may not be able to ensure that such parts will not be protected from access.
- 2.8.4** Proponents are advised that The Town will, as necessary, be disclosing the responses on a confidential basis to its employees and advisors who have a need to know in connection with this RFP process for, among other things, the purpose of evaluating and participating in the evaluation of the responses. It is the responsibility of each Proponent to ensure that all personal information provided to The Town with respect to the Proponent's personnel and their experience is supplied with the informed consent of such individuals and in accordance with applicable law. By submitting any personal information each Proponent represents and warrants that it has obtained the informed consent of the individuals who are the subject of such information to its collection, use and disclosure for purposes of this RFP response. Also, such individuals are agreeing to the use of such information as part of the RFP evaluation process, for any audit of the procurement process and for contract management and performance purposes.
- 2.8.5** Vendors or suppliers having access to or custody of The Town records shall be required to comply with the provisions of the *Access to Information Act*. All assessment records of the Town in possession of the Vendor remain the property of the Town.

2.9 COST OF PREPARATION

- 2.9.1** Any cost incurred by the Proponent in the preparation of its response to this RFP shall be borne solely by the Proponent.
- 2.9.2** Shortlisted candidates may be invited to participate in an interview. The Town will not pay for the time required or travel expenses incurred to participate in the interview.

2.10 OWNERSHIP OF SUBMISSIONS

- 2.10.1** All responses submitted to The Town become the property of The Town and shall not be returned. They will be received and held in confidence by The Town, subject to the provisions of the *Access to Information Act*. Unsuccessful Proponent submissions will be kept as record for the procurement process until two years after the date of decision for the RFP award.

2.11 CLARIFICATION FROM PROPONENTS

- 2.11.1** The Town reserves the right to seek from any/all Proponents any further clarification it may require on responses submitted pursuant to this RFP.

2.12 PROPONENT PERFORMANCE

- 2.12.1** The selected Proponent may be evaluated throughout the course of service delivery in connection with any specific work or projects undertaken as a result of any agreement entered into between any Proponent and The Town. The Town may also conduct periodic reviews/assessments of any selected Proponent, taking into consideration, in addition to specific work related to the project undertaken by the Proponent, ongoing Proponent staff qualifications, experience, training, and staff changes. Any evaluation/assessment will be shared with the Proponent, with the goal of immediate and permanent resolution where concerns have been raised. The Town reserves the right to remove from the roster any selected Proponent who has been qualified by this RFP process by way of written notice if, in the sole discretion of The Town, based on any on-going or specific evaluation or assessment of the Proponent or its performance of any work, it is deemed to be in The Town's best interests.

2.13 LENGTH OF AGREEMENT

- 2.13.1** The term of the agreement will be for approximately three (3) years commencing from the start date identified on the Letter of Award (anticipated October 3, 2025) and ending on November 30, 2028.
- 2.13.2** The Town reserves the right to extend this term to complete any in-progress projects.
- 2.13.3** If mutually agreeable between the Service Provider and The Town, the assignment may be extended for up to two (2) additional one (1) year periods under the same conditions and at the rates or prices specified in this Request for Proposal. However, The Town reserves the right to negotiate various changes to the Agreement to reflect current conditions at the time of renewal.

2.14 FORM OF CONTRACT

- 2.14.1** The Town will be issuing a Letter of Award to the Successful Proponent to deliver the work described within this Request for Proposal.

2.15 PROFESSIONAL SERVICES TERMS AND CONDITIONS

- 2.15.1** Agreements consist to any number of the following documents including all amendments incorporated in the documents before their execution and subsequent amendments made pursuant to the provisions of the Agreements:
- Request for Proposal
 - Addenda
 - Statement of Scope
 - Proposal
 - Letter of Award

- Consulting Services Agreement

2.15.2 Any inconsistent or conflicting provisions contained within the documents forming the Agreement shall be resolved in the following order:

- Letter of Award
- Statement of Scope
- Proposal
- Addenda
- Request for Proposal
- Consulting Services Agreement

2.16 STAFF CHANGES

2.16.1 Staff changes by the successful Proponents will require written approval from The Town prior to any such change, which approval The Town may withhold in its sole discretion. The qualifications and experience of the proposed staff change must be equivalent to or better than the staff proposed in the proposal received. The Town reserves the right, in addition, and without prejudice to any other right or remedy, to immediately terminate the Agreement as a result of the failure by the Successful Proponent to provide the staff proposed.

2.17 NON-ASSIGNMENT

2.17.1 Neither the contract nor any work to be performed under the contract or any part hereof may be assigned by the Successful Proponent without the prior written consent of The Town. Such written consent however shall not under any circumstances relieve the Successful Proponent of its liabilities and obligations under the Contract and the granting of such consent shall be within the sole and unfettered discretion of The Town.

2.18 DEPOSITS

2.18.1 The Town will not consider the payment of a deposit to the Successful Proponent for the scope of work in this RFP.

2.19 TERMS OF PAYMENT

2.19.1 Invoices will be paid within 30 days from the approval date of the invoice.

2.20 INSURANCE AND WORKERS' COMPENSATION BOARD REQUIREMENTS

2.20.1 Mandatory Eligibility Requirements

As a mandatory eligibility requirement for response to this RFP:

- a) The Successful Proponent shall carry at all times during the performance of the work General Liability/ Umbrella Liability Insurance with a limit of not less 2 MILLION DOLLARS (\$2,000,000) inclusive per occurrence for bodily injury (including death) and damage to property including loss of use thereof. Such insurance shall at a

minimum include coverage of broad form property damage, contractual liability, cross liability, completed operations and product liability, and such other types of insurance as would be carried by a prudent person performing such contract work and as The Town may from time to time require.

- b) The Successful Proponent shall carry at all times during the performance of the work Automobile Liability Insurance for owned and non-owned automobiles with a limit of not less than 2 MILLION DOLLARS (\$2,000,000) inclusive per occurrence.
- c) The Successful Proponent shall at all relevant times carry Workers Compensation Board coverage either of Alberta or of another AWCBC board that will extend the required amount of coverage to cover the employee outside of their home province. Proponents shall submit their WCB number together with a letter from the appropriate department indicating there are no outstanding fees, fines, claims or debts due on the Successful Proponent's account to The Town prior to the commencement of the work.

2.20.2 Responsibilities of Successful Proponent

- a) The Successful Proponent shall supply insurance coverage and pay all costs and expenses, including premiums relating to the insurance coverage requirements as set out herein, and shall supply The Town with a certificate of insurance for all policies on an annual basis. Such policies will include a statement that the coverage shall not be terminated without a prior 30-day written notice to The Town.
- b) The Successful Proponent or their insurer will notify The Town at least thirty (30) days prior to any change in insurer, any cancellation of the insurance policy, or any substantial change in the policy or coverage that would materially alter the coverage provided by the Successful Proponent to The Town.
- c) The Successful Proponent shall provide a certificate of such insurance to The Town within five (5) days of notification of award or prior to commencing the work, whichever is sooner.

2.20.3 Qualifications and Designation of Assessors

- a) All Vendors assessment personnel must meet the qualifications as prescribed in the Qualifications of Assessor Regulation AR 233/2005.
- b) The Vendor must provide a designated individual that shall be appointed by the Town as the designated assessor in accordance with the Municipal Government Act.

2.21 INDEMNIFICATION

2.21.1 The Successful Proponent agrees to indemnify and save harmless The Town, its councillors, officers, agents, representatives, and employees, against all suits or claims, requests, legal action and liability regardless of the nature and expenses sustained from injuries or death or any damages or loss to property as a result of the usage of premises or in the execution of the Successful Proponent functions arising from this contract except to the extent of The Town's gross negligence.

2.21.2 At no time will The Town be responsible for any injury sustained by the Successful Proponent, their employees or any person on The Town's premises, nor will The Town be responsible for any loss, including loss of profits or damage caused to the goods of the Successful Proponent, their employees or any other person, including damage to vehicles and their contents, while these goods are on The Town's premises or site.

2.21.3 The Town shall not be liable for any incidental, indirect, special or consequential damages or any

loss of use, revenue or profit of the Successful Proponent arising out of or in any way related to this RFP or subsequent contract.

2.22 CANADIAN FREE TRADE AGREEMENT

2.22.1 As per the requirements of the Canadian Free Trade Agreement (2017), this RFP and corresponding purchases are subject to *Chapter Five – Government Procurement of the Agreement*.

2.23 DEBRIEFING

2.23.1 The Town will offer a debrief to unsuccessful Proponents on request.

END OF SECTION 2.0

3.0 PROJECT OVERVIEW AND SCOPE

3.1 RFP DEFINITIONS

Owner	The Town of Canmore
Project	Assessment Services
Proponent	a firm, individual or company who or which intends to submit or submits a Proposal pursuant to this RFP.
Proposal	a submission to The Town in response to this RFP.
Successful Proponent	a firm, individual or company with whom The Town may decide to initially discuss contract arrangements based upon acceptance of the Proponent's Proposal.
The Town	The Town of Canmore
Vendor or Service Provider	the Successful Proponent to whom the Town of Canmore issues a contract/purchase order for the assessment services

3.2 PROJECT DESCRIPTION/DESCRIPTION OF NEED

- 3.2.1** Assessment services are required by the Town to carry out the assessment of property within the Town, primarily for taxation purposes. The Town is looking for a qualified assessor/assessment company to provide these assessment services and assessment related activities.

3.3 SCOPE OVERVIEW/SCOPE OF SERVICES

- 3.3.1** GENERAL SCOPE OF WORK
The service provider will provide assessment services and related assessment activities for the Town.

Information from 2024 assessment for 2025 tax year:	
Total number of tax rolls	13,290
Total assessment for Residential – Primary, Residential and Tourist Home properties	\$10,576,299,160
Total assessment for Vacant, Serviced and Vacant, Un serviced properties	\$202,122,600
Total assessment for Non-residential properties	\$2,139,110,570
Total assessment for Machinery and Equipment	\$431,030
Total assessment for Linear properties	\$59,689,140
Total assessment for Exempt properties	\$743,937,550
Assessment Records	CAMA format

Method of Assessment	Market-Modified Cost Approach
Municipal System	Diamond/Microsoft GP Dynamics

3.3.2 DUTIES, RESPONSIBILITIES AND DELIVERABLES OF SERVICE PROVIDER

The primary responsibilities of the service provider are as follows:

- To provide preliminary review of existing assessment information for The Town.
- To prepare assessments in accordance with the Municipal Government Act and its attendant regulations and adhere to any other policies or guidelines as issued from time to time from the Alberta Provincial Government
- Send out annual Requests for Information under section 295 of the MGA to both collect Primary Residence declarations, and to collect any other information necessary to complete assessments, with administrative support provided by the Town
- Annual adjustment of Assessment Codes for Primary Residence declarations
- Assignment of properties into assessment classes, including those based on Primary Residence declarations
- To provide completed assessments to The Town in compliance with the statutory timelines prescribed in the Municipal Government Act and its attendant regulations, and in compliance with any proposed timeframes established with Administration.
- To provide comprehensive Computer Assisted Mass Appraisal (CAMA) software and all subsequent hardware, at the Vendors sole cost, required to provide the assessment service.
- To provide any data conversion at the Vendors sole cost, which may occur as a result of differing versions of CAMA software.
- To provide the annual assessment electronically in a format compatible with the Town's tax base software.
- To provide security for all assessment data through regular backups. Any system malfunction that results in loss of assessment data or requires re-entry of assessment data will be remedied at the sole cost of the Vendor.
- To provide assessment information as requested by the Minister of Municipal Affairs in compliance with the statutory reporting requirements prescribed in the Municipal Government Act and its attendant regulations.
- To provide projected assessment changes for the coming year to aid in the budgeting process.
- To address ratepayer assessment questions and concerns and provide direct electronic communication (telephone or email) to address day-to-day questions from ratepayers in a timely manner.
- To conduct on site interviews with ratepayers on request.
- To provide annual working session with Town Council to provide additional information and answer questions on the assessment process and discuss any emerging trends or other matters.
- To deal with the media only in concert with representatives from the Town.
- To deal with rate payers that have formal assessment appeals, in an attempt to resolve the assessment appeals, including appeals based on assigned subclasses resulting from the Primary Residence declaration process. If the assessment appeal

cannot be resolved, the service provider will provide defence of any assessment complaints before the Assessment Review Board, and any assessment appeals before the Municipal Government Board in compliance with the statutory timelines established as prescribed in the Municipal Government Act.

- To provide expert witnesses as required in defence of complaints and appeals at the Vendors sole cost. Legal representation will be the responsibility of the Town.
- To prepare Supplementary Assessments and accompanying activities as outlined above.
- At the end of the contracted term (including any optional extensions), to transfer assessment information, and inspection cycle data to the next designated assessor.

3.3.3 SERVICES NOT INCLUDED

The assessment services covered by this RFP will not include the assessment of properties assessed by the provincial assessor.

3.4 ANTICIPATED SCHEDULE

3.4.1 Key milestones include:

Milestone	Description
October 10, 2025	Anticipated start date of new assessment contract
October/November 2025	Transition period between current and new assessor
November 30, 2025	Final day of transition period between current and new assessor
December 31, 2025	Date of assessment information
January 15, 2026	Targeted date for the Town to receive assessment data
February 28, 2026	Final deadline for municipalities to receive assessment data per MGA
April 2026	60 days after assessment date; deadline for assessment appeals
June 30, 2026	Deadline for rate payers to pay taxes owing
Throughout 2026	LARB/CARB Hearings
October 1, 2026	Date for Supplementary Assessment
December 2026	60 days after assessment date; deadline for supplementary assessment appeals

The deadlines from December 31st onwards will also continue annually for the term of the contract and any additional terms.

At the end of the contract, the Vendor shall deal with any complaints related to the most recently completed assessment/tax year and complete a 20% re-inspection cycle prior to August 31st of that year.

END OF SECTION 3.0

4.0 RESPONSE REQUIREMENTS AND EVALUATION CRITERIA

4.1 FORMAT AND OUTLINE OF RESPONSES

Electronic RFP responses are to be on 8.5" x 11" size pages in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission.

Responses to each section shall be marked with the corresponding letter and number (e.g. A1, A2, etc.).

4.2 PROPOSAL SUBMISSION REQUIREMENTS

Proponents are requested to submit a proposal containing the following:

A. Mandatory Requirements

Requirements	Page Limit
Executed Appendix A, B and Signature and Waiver sheet, the signatory contact shall be authorized to participate in contract negotiations	No Limit
Insurance Requirements: Provide evidence from your insurance company confirming your ability to secure insurance as described in Section 2.20.	No Limit
WCB Requirements: Provide evidence of WCB coverage as described in Section 2.20.	No Limit
All Proponents assessment personnel must meet the qualifications as prescribed in the Qualifications of Assessor Regulation AR 233/2005. Submit evidence of qualifications as part of item B.	No Limit
The Proponent must provide the name of the individual to be appointed by the Town as the designated assessor in accordance with the Municipal Government Act. Identify this person as part of item B submission.	No Limit

B. Profile – Experience, Qualifications, Education

Requirements	Page Limit
Provide a brief description of your firm, your relevant prior experience, include any proposed subconsultants.	Maximum one (1) page
Attach resumes for all staff identified in the proposal including: <ul style="list-style-type: none"> • Education and Qualifications • Experience • Title • Certifications/Qualifications of Assessor Regulation AR 233/2005 • Identify who the designated assessor will be in accordance with the Municipal Government Act. 	Maximum two (2) pages per person

Requirements	Page Limit
<p>Provide a brief description of the services provided for three (3) municipalities in which the Proponent has provided services that are similar in scope and complexity to the services described in this RFP. Description must include:</p> <ul style="list-style-type: none"> • The name of the municipality and official contact person; • Email address; and • Telephone number. 	Maximum two (2) pages

C. Approach to Services

Requirements	Page Limit
<p>Town Familiarity Plan:</p> <p>Discuss how your firm will become familiar with The Town, including developing general knowledge of town neighbourhoods and events.</p>	Maximum five (5) pages
<p>Ratepayer Communication Plan:</p> <p>Include information on how ratepayer assessment questions and concerns will be addressed including expected response times.</p>	
<p>Administration Communication Plan:</p> <p>Include a written plan on how administration's questions and concerns will be addressed, including:</p> <ul style="list-style-type: none"> • Expected response times to inquiries/requests from the Administration; and • Established travel schedule; or • Number of days Administration can expect the Service team to be in The Town. 	
<p>Provide a schedule and written plan of property inspections including:</p> <ul style="list-style-type: none"> • Cyclical inspection of existing properties; • Annual inspection of new developments; and • A discussion on how the Proponent will assess and maintain for several unique and difficult to value properties such as resort hotels and high-end residential properties. 	
<p>Continuing Education:</p> <p>Provide a synopsis of any current and planned continuing education initiatives over the next three years. Any training of Vendors staff is the sole responsibility of the Vendor.</p>	

D. Price Proposal

Requirements	Page Limit
Completed Appendix A Proponents shall provide a breakdown of normal operating costs and cost areas, such as any required system conversion and unique properties valuation.	No limit
Completed Appendix B including Optional Service pricing	No limit

4.3 EVALUATION PROCESS

- 4.3.1** Selection of the Successful Proponent pursuant to this RFP will be made on the basis of the Proponent's written response and other factors germane to the Town of Canmore. The responses shall be evaluated based on the matrix shown below.

Evaluation Criteria	Evaluation
A. Mandatory Requirements	Pass / Fail
B. Profile – Experience, Qualifications, Education	45%
C. Approach to Services	35%
D. Price Proposal	20%

- 4.3.2** A submission will first be reviewed for compliance with the mandatory requirements of this RFP as listed above. A submission not complying with the criteria may be considered non-compliant and not receive further consideration.

4.4 PROPONENT SHORTLIST

- 4.4.1** It is expected that two (2) Proponents will be shortlisted based on the evaluation of submissions for the criteria outlined in Section 4.3 above. The Town reserves the right to shortlist any number of Proponents.
- 4.4.2** Proponents are not guaranteed any paid assignment as a result of being shortlisted via this RFP. Shortlisted Proponents may be required to undergo an interview prior to final selection of the Successful Proponent.

4.5 CONFIDENTIALITY OF EVALUATION

- 4.5.1** Evaluation scores and rankings are confidential, and apart from identifying the top-ranked Proponent, no details of the submission, score or ranking of any Proponent will be released to any Proponent.
- 4.5.2** As required by the Canadian Free Trade Agreement, the name of the Successful Proponent and the value of the award will be posted on the Alberta Purchasing Connection.

4.6 RFP SCHEDULE

The following schedule has been established for this RFP:

Activity	Date
RFP Issued	3 September, 2025
Deadline for Questions	19 September, 2025
Closing Date	26 September, 2025
Interviews with short-listed proponents (Optional)	Week of September 29, 2025
Letter of Award to be issued to Successful Proponent	3 October, 2025
Anticipated Contract Start Date	10 October, 2025

END OF SECTION 4.0

5.0 SIGNATURE AND WAIVER SHEET

1. The Proponent hereby acknowledges that prior to submitting a Proposal for this project, the Proponent has obtained from The Town and thoroughly reviewed in order to be familiar with and certain as to all of the terms and conditions set out in the Request for Proposal documents and all amendments thereto which are incorporated by reference into the above-cited Proposal as follows:

- a) Affidavit Verifying Corporate Signing Authority (if a corporation); and
- b) Affidavit of Execution Individual or Sole Proprietorship (if not a corporation).

The referenced documents may be viewed at The Town's website
(<https://canmore.ca/business/find-a-form> under Engineering Forms).

- a) The Proponent acknowledges the documents incorporated by reference as indicated in paragraph 1 above.
 - b) The Proponent further acknowledges that unless otherwise agreed by both parties and confirmed in writing it is subject to and bound by each provision included in each document incorporated by reference to the same extent that it would be if each such provision were set out and included with the hard copy of the Contract Documents.
 - c) The Proponent further acknowledges and confirms that either:
 - i. It has read and understood each provision included in each document incorporated by reference; or
 - ii. By signing this Signature and Waiver Sheet it waives any and all rights to claim or argue that it was not aware of any provision of any document incorporated by reference.
2. The terms of this document are severable from one another, and the invalidity of any one or more paragraphs in this document, will not affect the validity of the other paragraphs.
 3. The Proponent hereby acknowledges it has thoroughly reviewed and understood all the terms and conditions of the Request for Proposal ("RFP") which include those contained in the Instructions for Responding to this Request for Proposals, General Conditions of Response, all documents included by reference as set out in Paragraph 1, and specifications as may be listed in the Table of Contents and included in the Appendices (together the "Terms and Conditions").
 4. By signing this sheet, I confirm I have the full authority to represent the Proponent in all matters relating to the Proposal, and I confirm that the Proponent agrees to be bound by all the Terms and Conditions.

Name of Business Entity	
Complete Address:	
Phone	Mobile Phone
Fax	Email
Website	
Proponent Signature	Affix Corporate Seal:
Title	
Printed Name	
Date	

Note: A seal is a preferred element of the signing of a submission. However, if the corporation or other legal entity making the submission does not have a seal or if it is not available, the corporation or entity should provide reasonable documentation to confirm the printed name and position of the person or persons signing, as well as to confirm that such person or persons signing on behalf of the entity has or have authority to bind the entity. Affidavits of authority and execution will normally constitute reasonable confirming documentation. Forms for each of these affidavits can be found at (<http://canmore.ca/business/find-a-form> under Engineering Forms). Without limiting the preceding paragraph but for further clarity, if the corporation or other legal entity does not have a seal or if it is not available:

- For a corporation or other business association, the printed name and position of the person or persons signing together with an affidavit of execution and an affidavit of authority should be completed and submitted,
- For an individual or sole proprietorship, the printed name and position of the person signing together with an affidavit of execution should be completed and submitted.

END OF SECTION 5.0

6.0 APPENDIX A – PROPOSED FIXED PRICE FORM

Date: _____

I/we, _____

(Company Name)

of _____

(Business Address)

I/we have carefully examined all documents prepared for this contract; and hereby offer to furnish all labour, materials, and services for the proper execution and completion of the entire scope of work for the Total proposed fixed price below (excluding GST) and inclusive of disbursements. The Total proposed fixed price is broken down by year as follows:

Service Year	CAD Dollars
Transition period (October 10 to November 30, 2025)	
Year 1 (December 1, 2025 to November 30, 2026)	
Year 2 (December 1, 2026 to November 30, 2027)	
Year 3 (December 1, 2027 to November 30, 2028)	
Total proposed fixed price excluding GST	

I/we acknowledge receipt of the following Addenda and have included for the requirements thereof in my/our RFP response: Addendum # _____ to _____.

(Signature)

END OF SECTION 6.0

7.0 APPENDIX B – HOURLY RATES

Date: _____

I/we, _____

(Company Name)

of _____

(Business Address)

Provide proposed hourly rates **excluding GST**:

Position Title	Rate Per Hour (in CAD \$)

I/we acknowledge receipt of the following Addenda and have included for the requirements thereof in my/our RFP response: Addendum # _____ to _____.

(Signature)

END OF SECTION 7.0