



COLUMBIA SHUSWAP REGIONAL DISTRICT

REQUEST FOR PROPOSALS

Capacity Building Needs Assessment and Rural Development Plan for Electoral Area 'A'

The Columbia Shuswap Regional District (Regional District) is seeking Proposals for the provision of consulting services for the creation of a Capacity Building Needs Assessment and Rural Development Plan.

Proposals clearly marked “**REQUEST FOR PROPOSALS – CAPACITY BUILDING NEEDS ASSESSMENT AND RURAL DEVELOPMENT PLAN FOR ELECTORAL AREA ‘A’**”, will be accepted until **2 PM** local time on **Tuesday, May 19, 2015** at the office of the Columbia Shuswap Regional District, 781 Marine Park Drive NE, P.O. Box 978, Salmon Arm, BC, V1E 4P1.

Proposal documents and further information are available online on the Columbia Shuswap Regional District website at www.csrdb.ca, BC Bid website at www.bcbid.gov.bc.ca, CivicInfo BC website at www.civicinfo.bc.ca and at the office of the Columbia Shuswap Regional District (at the above noted address during regular office hours).

The Columbia Shuswap Regional District reserves the right to accept or reject any or all proposals and to waive any informality in the proposals received, in each case without giving any notice. The Columbia Shuswap Regional District reserves the right to accept the proposal which is deemed most advantageous.

Fax submissions will not be accepted. The lowest or any proposal will not necessarily be accepted.

For further information, please contact:
Charles Hamilton, Chief Administrative Officer
T: 250.833.5905
E: chamilton@csrdb.ca



COLUMBIA SHUSWAP REGIONAL DISTRICT

REQUEST FOR PROPOSALS

**Capacity Building Needs Assessment and
Rural Development Plan for Electoral Area 'A'**

April 2015

Columbia Shuswap Regional District
781 Marine Park Drive
Box 978 SALMON ARM BC, V1E 4P1
T: 250.832.8194 TF: 1.888.248.2773 F: 250.832.3375
www.csr.bc.ca



General Scope of Services

The Columbia Shuswap Regional District (Regional District) requires the services a qualified firm or individuals for the provision of consulting services for the creation of a *Capacity Building Needs Assessment and Rural Development Plan*. The Regional District is interested in retaining a consultant with expertise in strategic planning, community development, and community engagement to lead this planning process.

The primary purpose of the project is to assist the Electoral Area 'A' Director and the Regional District in building local capacity for sustainability through facilitation, training, and education. The capacity building project is intended to provide for a process by which all stakeholders look to its future and develop the tools necessary to achieve that future.

1. INTRODUCTION

1.1 Form of Contract

The successful Proponent will enter into a form of contract for the delivery of the services based on the Proponent's proposal, the terms within this (Request for Proposal) RFP and negotiations with the Preferred Proponent and the Regional District.

1.2 Definitions

In this RFP the following definitions shall apply:

"Closing Time" has the meaning set out in Section 2.1;

"Contract" means a formal written contract between the Regional District and a Preferred Proponent to undertake the Services;

"Office" means the office of the Columbia Shuswap Regional District located at Box 978, Salmon Arm, BC V1E 4P1;

"Preferred Proponent(s)" means the Proponent(s) selected by the Regional District to enter into negotiations for a Contract;

"Proponent" means an entity that submits a Proposal;

"Proposal" means a proposal submitted in response to this RFP;

"RFP" means this Request for Proposal.

2. INSTRUCTIONS TO PROPONENTS

2.1 Closing Time and Address for Proposal Delivery

Proposals must be received:

(a) at the office of:



Columbia Shuswap Regional District
Attention: Charles Hamilton
781 Marine Park Drive NE,
PO Box 978
Salmon Arm, BC V1E 4P1

- (b) or electronic submission via email in PDF format to:
chamilton@csrd.bc.ca
- (c) on or before the following date and time (the “Closing Time”):
Time: 2:00 PM local time
Date: Tuesday, May 19, 2015

It is the Proponent’s sole responsibility to ensure its Proposal is received at the address set out above by the Closing Time.

Faxed submissions will not be accepted.

Proposals will be opened in private by the Regional District after the Closing Time.

2.2 Number of Copies

Proposals submitted by mail should include the original plus two hard copies (three in total).

2.3 Late Proposals

Proposals received after the Closing Time may not be accepted or considered and will be returned upon the Proponent’s request and at the Proponent’s expense.

2.4 Amendments to Proposals

Proposals may be revised by written amendment, delivered to the location set out above, or submitted electronically via email in PDF format, at any time before the Closing Time but not after. Amendments received by fax will not be accepted.

2.5 Inquiries

All inquiries related to this RFP should be directed in writing to the person named below **(the “Regional District Representative”)**:

Charles Hamilton, Chief Administrative Officer
Columbia Shuswap Regional District
PO Box 978
Salmon Arm BC V1E 4P1
T: 250.833.5905
TF: 1.888.248.2773
F: 250.832.3375
Email: chamilton@csrd.bc.ca



Information obtained from any person or source other than the Regional District Representative may not be relied upon.

Inquiries should be made no later than three days before Closing Time. The Regional District reserves the right not to respond to inquiries made within three days of the Closing Time. Inquiries and responses will be recorded and may be distributed to all Proponents at the discretion of the Regional District.

Proponents finding discrepancies or omissions in the RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the Regional District Representative. If the Regional District determines that an amendment is required to this RFP, the Regional District Representative will issue an addendum in accordance with Section 2.6. **No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.**

2.6 Addenda

If the Regional District determines that an amendment is required to this RFP, the Regional District will post a written addendum on the Regional District's website www.csr.d.bc.ca that will form part of this RFP. No amendment of any kind to this RFP is effective unless it is posted in a formal written addendum on the Regional District's website. Upon submitting a Proposal, Proponents will be deemed to have received notice of all addenda that are posted on the Regional District's website.

2.7 Examination of Documents

Proponents will be deemed to have carefully examined the RFP, including all attached Schedules and all relevant documents, prior to preparing and submitting a Proposal with respect to any and all facts which may influence a Proposal.

3. PROPOSAL SUBMISSION FORM AND CONTENTS

3.1 Package

Proposals must be submitted in the Proposal Format as outlined in Schedule 'B', Proposal Submission Format. Proposals submitted by mail should be in a sealed package, marked on the outside with the Proponent's name and title of the project.

3.2 Form of Proposal

The Regional District reserves the right to waive informalities in proposals, reject any or all proposals or accept the proposal deemed most favorable in the interests of the Regional District. Furthermore, the Regional District reserves the right to negotiate with any proponent at its discretion. The Proponents will be competent and capable of performing the work. The proponent may be required to provide evidence of previous experience and financial responsibility before a contract is awarded.



3.3 Signature

The proposal should be signed by a person authorized to sign on behalf of the Proponent and include the following:

- (a) If the Proponent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Proposal should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Proposal on behalf of the corporation is submitted;
- (b) If the Proponent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venture should sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the Regional District that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venture is a corporation then such corporation should sign as indicated in subsection (a) above; or
- (c) If the Proponent is an individual, including a sole proprietorship, the name of the individual should be included.

4. EVALUATION AND SELECTION

4.1 Evaluation

The Regional District will evaluate the Proposals by applying the evaluation criteria as described in Section 4.2 to identify the Proponent that the Regional District determines is the most advantageous to the Regional District.

The criteria will be applied without priority or weighting established in advance of the evaluation, and in particular, the Proponent whose Proposal has the lowest price will not necessarily be selected as the Preferred Proponent. The Regional District will apply the criteria evenly and fairly to all Proposals.

4.2 Evaluation Criteria

The Regional District will compare and evaluate all Proposals to determine the Proponent's strength and ability to provide the Services in order to determine the Proposal which is most advantageous to the Regional District, using the following criteria:

- (a) **Quality of Proposal**
Proposals should be concise, complete and express a clear understanding of the RFP and desired deliverables. The proponent's approach to the project should be conveyed through clearly defined methodology and task evaluation. Proposals should identify the timeframe for deliverables including milestones. Where applicable the proposal should identify opportunities for creativity and innovation.



(b) **Experience**

The successful Proponent must have the necessary competence, experience, qualified personnel and equipment to carry out all aspects of the work of the Contract. The successful Proponent will employ properly licensed, trained and unimpaired workers throughout the duration of the contract. Failure to do so could result in termination. Copies of certifications may be requested by the Regional District.

(c) **Reputation and Resources**

Proponents will provide complete information on experience of key personnel to be involved in the review process and references from work on similar projects. The Proponent must include a minimum of three references complete with contact information in the proposal for projects similar to the project described herein. Proponents will submit evidence of previous successful performance in comparable work. A brief description of the projects completed with each reference should be provided.

(d) **Financial**

The Regional District will consider the Proponent's prices as indicated in the Proposal.

4.3 **Additional Information**

The Regional District may, at its discretion, request clarifications or additional information from a Proponent with respect to any Proposal, and the Regional District may make such requests to only selected Proponents. The Regional District may consider such clarifications or additional information in evaluating a Proposal.

4.4 **Waiver of Deficiencies**

If a Proposal does not satisfy every Regional District request or requirement as described in this RFP, the Regional District may, in its sole discretion, waive such deficiency and consider such Proposal in the evaluation of Proposals.

4.5 **Selection of Proponent**

The Regional District will select the Proponent which it determines is the most advantageous to the Regional District based on the Evaluation Criteria set out in Section 4.2 above. The Regional District is not bound to accept the lowest priced Proposal. The Regional District reserves the right to accept or reject any Proposal in whole or in part.

4.6 **Good Faith Negotiations**

By submission of its Proposal, the Proponent agrees that if at any time in the 60 days from the Closing Time it is selected by the Regional District to enter into negotiations for a Contract, the Proponent will, in good faith, participate in negotiations with the Regional District and use reasonable commercial efforts to reach agreement and finalize a Contract with the Regional District based on the Proponent's Proposal.



4.7 Negotiation of Contract and Award

If the Regional District selects a Preferred Proponent or Preferred Proponents, then it may:

- (a) Enter into a Contract with the Preferred Proponent(s); or
- (b) Enter into discussions with the Preferred Proponent(s) to clarify any outstanding issues and attempt to finalize the terms of the Contract(s), including financial terms. If discussions are successful, the Regional District and the Preferred Proponent(s) will finalize the Contract(s); or
- (c) If at any time the Regional District reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached within a reasonable time, give the Preferred Proponent(s) written notice to terminate discussions, in which event the Regional District may then either open discussions with another Proponent or terminate this RFP and retain or obtain the services in some other manner.

5. GENERAL CONDITIONS

5.1 No Regional District Obligation

This RFP is not a tender and does not commit the Regional District in any way to select a Preferred Proponent, or to proceed to negotiations for a Contract, or to award any Contract, and the Regional District reserves the right in its sole discretion to at any time reject all Proposals, and to terminate this RFP process.

5.2 Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing, and submitting Proposals, and for any meetings, negotiations or discussions with the Regional District relating to or arising from this RFP. The Regional District and its representatives, agents, consultants and advisors will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP.

5.3 No Contract

By Submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFP, prior to the signing of a formal written Contract.

5.4 Conflict of Interest

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the Regional District, its elected or appointed officials or employees. The Regional District may rely on such disclosure.



5.5 Confidentiality

All submissions become the property of the Regional District and will not be returned to the Proponent. All submissions will be held in confidence by the Regional District unless otherwise required by law. Proponents should be aware the Regional District is a “public body” defined by and subject to the Freedom of Information and Protection of Privacy Act of British Columbia.

5.6 Insurance

The successful Proponent will, in the event of award, be required to provide to the Regional District, within ten (10) days of award:

- (a) proof of public liability insurance for injury, property damage or death arising from the Proponent’s operations under the agreement in an amount not less than **THREE MILLION (\$3,000,000) DOLLARS** naming the Columbia Shuswap Regional District as additional named insured;
- (b) proof of professional liability insurance in an amount of not less than **FIVE HUNDRED THOUSAND (\$500,000) DOLLARS**; and
- (c) proof of registration with WorkSafe BC.



SCHEDULE 'A'

TERMS OF REFERENCE

INTRODUCTION AND BACKGROUND

The Columbia Shuswap Regional District (Regional District) is located in the southern interior of British Columbia. It is bisected by the Trans-Canada Highway and is situated roughly mid-way between Calgary and Vancouver on the northern end of the Kootenay and Okanagan valleys. The Regional District is a large and diverse regional district comprising some 30,107 square kilometres stretching from Shuswap Lake in the west to the Alberta border in the east. It has a total population of approximately 52,700 and is made up of six unincorporated electoral areas and four member municipalities:

Electoral Areas	Municipalities
Electoral Area 'A' - Rural Golden	Golden
Electoral Area 'B' - Rural Revelstoke	Revelstoke
Electoral Area 'C' - South Shuswap	Sicamous
Electoral Area 'D' - Falkland / Salmon Valley / Rancho	Salmon Arm
Electoral Area 'E' - Rural Sicamous	
Area 'F' - North Shuswap	

The Regional District is a form of local government that provides a variety of localized and regional services to the electoral areas and municipalities, including: the 9-1-1 telephone emergency response service, water systems, fire departments, land-use planning, building inspection, regional library services, solid waste management and community parks and recreation services.

The Capacity Building Needs Assessment and Rural Development Planning project will focus on Electoral Area 'A' of the Regional District. Area 'A' is comprised of the rural communities of Parson, Field, Nicholson, Blaeberry and Donald, along with the rural areas of McMurdo, Beaverfoot, Willowbank, Moberley, and the North Bench.

Area 'A' is the largest electoral area in the Regional District and covers three major physiographic areas; the Rocky Mountains, the Rocky Mountain Trench and the Columbia Mountains. Area 'A', located in Southeastern British Columbia, had a population of 3,065 persons in 2011 and covers an area that is approximately 13,500 square kilometres in size. With a population density of 0.2 persons per square kilometre, settlement density is considerably below the provincial rate of 4.2 persons per square kilometres. Most development has a rural character and stretches approximately 30 kilometres north and 55 kilometres south of Golden and is located in the Columbia River Valley.



In the spring of 2003, the Regional District requested consulting proposals for a *Columbia Shuswap Regional District Area 'A': Issues Identification and Planning Education Project*. TRUE Consulting Group was authorized to proceed with the project and an advertisement for volunteers for a Community Working Group was published in August 2003. The first meeting of the Community Working Group was held in September 2003. The goals for the project were as follows:

- to develop a community vision;
- to identify community issues and concerns;
- to raise public awareness of planning; and
- to gauge community interest in further planning exercises.

The *Columbia Shuswap Regional District Area 'A': Issues Identification and Planning Education Project Report* was finalized in January 2005.

SERVICES AND REQUIREMENTS

It is now ten years since the *Issues Identification Report* was finalized. While many of the issues and challenges facing the region ten years ago are still relevant today, there are new challenges and opportunities, along with a renewed desire to reassess local conditions, develop objectives, identify assets, and mobilize groups or individuals to achieve the objectives. It is anticipated that this capacity building exercise will provide a preliminary strategic framework on which future planning efforts can be built. At present, the majority of Electoral Area 'A' has no land use policies or building regulations in place.

The Regional District is seeking proposals from qualified firms and individuals for the provision of consulting services for the creation of a *Capacity Building Needs Assessment and Rural Development Plan*. The Regional District is interested in retaining a consultant with expertise in strategic planning, community development, and community engagement to lead this planning process.

The primary purpose of the project is to assist the Electoral Area 'A' Director and the Regional District in building local capacity for sustainability through facilitation, training, and education. The capacity building project is intended to provide for a process by which all stakeholders look to its future and develop the tools necessary to achieve that future.

The selected consultant will work with the Electoral Area 'A' Director, an appointed nine (9) member Local Advisory Committee (LAC), Regional District staff, and the community to create a *Capacity Building Needs Assessment and Rural Development Plan*.

The consulting assignment will involve the following specific activities:

1. A high level literature review that focuses on rural sustainability issues, as well as a review of previous plans and studies that have been undertaken by the Regional District. A high level summary of principal employment and recreation activities with Electoral Area 'A', for example: forestry, tourism, skiing, CP Rail, Kinbasket, National Park, transportation, etc.



2. Development and facilitation of a series of a minimum of six workshops with the LAC and other stakeholders.
3. Post workshop report including recommendations and next steps.

The workshops will provide opportunities to obtain input into the development of the rural development plan. They will provide the Area 'A' Director and the Local Advisory Committee an opportunity to engage in an informed and facilitated discussion about future directions for the community as a whole. Moreover, the workshops are intended to provide an opportunity to discuss issues, potential solutions and areas of collaboration on a wide range of community development and local government issues, including governance structures.

The purpose of the workshops will be to:

- Better understand the mandates, interests and challenges faced by the residents and various agencies involved in local governance and community development activities (i.e., the Town of Golden and the Regional District).
- Discuss and determine what actions might be taken at the local and regional government levels to address the identified challenges.
- Identify opportunities for improved inter-jurisdiction collaboration on shared services and community development.
- Identify collaborative 'next steps' that are timely, relevant and actionable.

Project Scope

The consulting assignment includes the following activities:

- Literature review and organizational scan
- Development and facilitation of a series of workshops (minimum of six) with the Area 'A' Director and Local Advisory Committee.
- Post workshop report

Deliverables

A report documenting the results of the assessment, options and recommendations.

Completion of the report and recommendations are expected by November 30, 2015.

All deliverables will become the sole property of the Regional District.

Anticipated Schedule

April 20, 2015
May 19, 2015

Release RFP
Proposal Closing Time 2 PM



Request for Proposals
Capacity Building Needs Assessment and
Rural Development Plan for Electoral Area 'A'

May 26 2015
May 27, 2014
June – Sept 2015
November 2015

Completion of Proposal Review by Staff
Preferred Proponents Selected
Literature review and workshops
Presentation of Rural Development Plan

Budget

The total budget for the feasibility study is \$30,000.00.

The total proposed cost must include all applicable taxes, expenses, meetings, presentations, etc.



SCHEDULE 'B'

PROPOSAL SUBMISSION FORMAT

All Proposals must follow the format outline below and all of the requested information must be provided to the Columbia Shuswap Regional District (Regional District).

Cover Letter and Executive Summary

The cover letter will reference the Request for Proposal (RFP) title and should clearly state the Proponent's understanding of the services to be provided. The letter should include the name(s) of the person(s) who are authorized to make representations for the Proponent, their title(s) and contact number(s) and email address. The cover letter should be signed by an authorized signatory in a position to legally bind the Proponent to statements made in response to this RFP.

The Executive Summary should provide a synopsis of the overall approach and key points in the Proposal.

Experience, Reputation and Resources

Provide sufficient information that demonstrates the Proponent's experience, reputation, capacity and availability of resources, including the ability to meet requirements of this RFP, qualifications and competencies, track record, references of current and former clients for types of services described in the RFP.

Provide sufficient information about the Proponent that includes but is not limited to:

- Contact information including name, title, address, email and contact numbers;
- Location of head office and subsidiary offices (if applicable);
- Number of employees (if applicable);
- Project Team Leader;
- Detailed information of the Proponent's years of relevant experience in providing the services required by this RFP.

Additional Information

Proponents may use this section to provide any additional comments about their experience and capacity which may be informative and beneficial to the Regional District.

Work Plan and Schedule

Proponents must provide a timetable and detailed work plan for the specified project including timelines for completion of specific tasks, time requirements and identification of specific deliverables.



Fees

Proponents must provide a schedule of the proposed costs to complete the project. Proposed costs for the project must be in its entirety.

Proponents must provide a rate sheet for any unforeseen services required that are not part of this RFP.