

# **REQUEST FOR PROPOSAL**

## **Slocan Valley Community Priorities Plan**

### **1. INTRODUCTION AND BACKGROUND**

The Slocan Valley Economic Development Commission intends to engage the services of a professional Consultant to assist in the development and deployment of a plan to establish key strategic priorities to support sustainable socio-economic development in all communities within the Slocan Valley. The plan will guide the allocation of funding which has been contributed by Columbia Basin Trust under their Community Development Program.

The Slocan Valley is comprised of three municipalities New Denver, Silverton, Slocan and rural Electoral Area H. The total permanent population of the Slocan Valley is approximately 5,300. there are some seasonal residents which do not increase the population any significant amount. It is the intent of the Slocan Valley Economic Development Commission to promote the Valley's unique identity, and support the development of well-paying, sustainable employment opportunities.

Under their Community Development Program, Columbia Basin Trust has contributed funding to develop and undertake community-based projects that align with achieving the Slocan Valley's collectively determined priorities. The goals and objectives of the Slocan Valley Directed Funds project are in furtherance of the public purpose of CBT and are specifically to:

- Implement projects or activities that demonstrably work to achieve long-term goals for the Slocan Valley, aligned with relevant Valley-wide plans.
- Implement projects that contribute to community benefits that align with the CBT Mandate to *“support efforts by the people of the Basin to create a legacy of social, economic and environmental well-being and to achieve greater self-sufficiency for present and future generations.”*

Public consultation leading to development of a plan outlining specific actions to be taken in the Slocan Valley is a key component to meeting these goals and objectives.

### **2. DEFINITIONS**

Throughout this Request for Proposal the following definitions apply: (a) “CBT” means Columbia Basin Trust;

(b) “Slocan Valley” means the Slocan Valley Sub-region of the RDCK;

(c) “Committee” means the Slocan Valley Economic Development Commission as a Committee of the Whole will serve as the Community Directed Funds Committee which is comprised of the RDCK Directors representing the Villages of New Denver, Silverton, Slocan, Area H, and the appointed commissioners as determined by the Slocan Valley Economic Development Commission Bylaw.

- (d) "Contract" means the written agreement resulting from this Request for Proposal executed by the SVEDC and the Contractor for the Work;
- (e) "Consultant" means the Successful Proponent to this Request for Proposal who enters into a written Contract with the SVEDC to perform and to oversee the Work;
- (f) "Lead Proponent" is the Proponent whose Proposal, as determined through the evaluation criteria described in this RFP, provides the best overall value in meeting the requirements of the RFP, and with whom a Contract shall be considered;
- (g) "Plan" means the Slocan Valley Community Priorities Plan;
- (h) "Proposal" means a Proposal submitted by a Proponent in response to this Request for Proposal;
- (i) "Proponent" means an individual or a company that submits, or intends to submit, a Proposal in response to this Request for Proposal;
- (j) "RDCK" means the Regional District of West Kootenay;
- (k) "SVEDC" means the Slocan Valley Economic Development Commission.
- (l) "RFP" or "Request for Proposal" means this Request for Proposal, inclusive of all attachments, appendices and any addenda that may be issued by the SVEDC
- (m) "Submission" means a Proposal submitted by a Proponent in response to this RFP;
- (n) "Successful Proponent" means the same as "Consultant";
- (o) "Work" means the provision of all labour, services, material and equipment, and any action as necessary for the Consultant to complete and perform its obligations in accordance with the terms and conditions of the Contract.

### 3. **Vision and Mission Statements, Values and Objectives of the Committee**

#### **Vision Statement**

The Committee's Vision is to support a legacy of social, economic, cultural and environmental development for the Slocan Valley for present and future generations by helping to develop projects and initiatives that provide benefit to the Slocan Valley as a whole. There is an overarching strategic desire to create sustainable communities by supporting projects that enhance opportunities in the Slocan Valley.

#### **Mission Statement**

The Committee's Mission is to articulate the needs and priorities of Slocan Valley communities, to identify opportunities to strengthen ties between these communities, and to create a process of selecting projects to support.

#### **Values and Objectives**

To realize its vision and accomplish its mission, the following Values and Objectives have been identified to guide the Committee's decision-making:

- Promote collaboration and cooperation;
- Ensure genuinely subregional planning;
- Achieve sustainability and long-term effectiveness;
- Support community engaged decision-making.

#### 4. THE PRODUCT

The Slocan Valley requires a Community Priorities Plan that identifies Valley-wide strategic priorities, specifies action items to fulfill the vision and mission of the Committee, and guides the allocation of the funding received from CBT. The Plan is to include at least the following components:

- Definition and map of the geographic region which is the Slocan Valley;
- Compilation of the demographics of the Slocan Valley;
- Reference and Summary of existing studies/plans for the Slocan Valley;
- Detailed Consultation plan.
- Execution of the Consultation Plan.

#### 5. THE PLAN COMPONENTS

In addition to the map and the demographics summary, the Community Priorities Plan for the Slocan Valley is comprised of two major components:

##### (a) Research Summary

Over time there have been various reports prepared and economic development processes undertaken with respect to the Slocan Valley. SVEDC will supply the Consultant with approximately 23 of the existing reports. The Consultant will gather additional relevant reports and information from the RDCK, the Slocan Valley municipalities, the Rural Development Institute at Selkirk College, and other government agencies, and will present a summary of their research. The purpose of this research is to provide a basis from which to start the process of preparing the Plan and to inform the Committee on previous initiatives that may or may not assist with fulfilling their vision and mission.

##### (b) Community Consultation

The Committee's goal is to develop a framework, including appropriate and transparent community engagement, to distribute funds provided by CBT under their Community Directed Funds program, in support of achieving the Slocan Valley's collectively determined priorities.

It is also to receive input from economic, social, cultural, environmental, agricultural, educational, First Nations and other perspectives which will be helpful in creating priorities and criteria for projects to be undertaken.

To develop the framework, the community must be engaged and must participate in determining the priorities and goals of the Slocan Valley and how those might be achieved. The community

consultation process is intended to learn about the common goals, objectives and priorities for the Slokan Valley according to different sectors of the community, and to seek feedback, input and reaction to how the Community Directed Funds should be distributed.

*The Consultant will assist in fine-tuning the community consultation plan and will be responsible for implementing it.*

In general terms, the consultation process is to include, but is not limited to, the following steps:

**Step 1:** Work with the Committee to identify and confirm consultation participants for the following two types of consultation:

**Type 1** – Targeted consultation with specific sectors and stakeholder groups in consultation with the SVEDC.

Targeted Consultation will include engagement with, but not be limited to, the following sectors: Environmental, Services, Hospitality, Recreation, Business/Industrial, Cultural, Agricultural Educational, First Nations and Public Service organizations.

**Type 2** – General consultation designed to elicit more wide-spread perspectives.

EDC/Committee members may attend Type 1 or Type 2 consultation meetings as EDC representatives, if appointed to attend by the Committee.

**Step 2:** Design the specific consultation plan including determining what methods of consultation to employ for Type 1 and Type 2; developing the questions to ask and feedback being sought from each type of participant in support of developing the Plan.

**Step 3:** Execute the Plan.

**Step 4:** Report back to the Committee and share the results of the consultation undertaken with the respondents.

**Step 5:** The Committee will review and comment on the results of the consultation and provide direction to the Consultant to develop the Draft Framework for distribution of CDF funds.

### **(c) Plan Preparation**

Based on the results of the community consultation and direction received from the Committee, the Consultant will prepare the Slokan Valley Community Priorities Plan articulating the results of the components of the Product.

The plan will give direction toward the next steps, being:

- Specific actions to be taken by the Committee to meet the CBT Mandate and the goals of the Committee.
- Specific criteria that will be applied in the selection of projects for funding.

- A 'project submission / solicitation' methodology which will be used in conjunction with the criteria set for project evaluation to assist the Committee with soliciting proposals and making decisions on future funding allocations.

The Consultant will meet with the Committee to present a draft of the Plan for review and revision and to present the final Priorities Plan.

#### **(d) Summary Session**

To assist the Committee with prioritizing the action items outlined in the Plan, the Consultant will attend a summary session with the Committee.

### **5. ROLE OF THE CONSULTANT**

The Consultant chosen will be one who has a background in strategic planning processes; public consultation; preparation of community-based plans or strategies; and has experience working with diverse sectors of the population.

The role of the Consultant will be to:

- Provide overall project direction/framework in the beginning of the project;
- Ensure adherence to objectives and be available for guidance throughout the project;
- Provide direction for and conduct community consultation;
- Review, analyze, and provide feedback in report form;
- Take notes at all meetings, including planning sessions with the Committee (minutes of formal Committee meetings will be the responsibility of SVEDC staff), and provide summary reports to the Committee;
- Prepare and validate recommendations and develop a detailed Slocan Valley Community Priorities Plan which is to include, but is not limited to, the components cited in this RFP.

### **6. DIRECTION/RESOURCES PROVIDED**

#### **(1) Slocan Valley Economic Development Commission Committee of the Whole (Committee)**

The role of the Committee will be to provide direction, ensure adherence to timelines and expectations, and provide feedback to the Consultant during the project. The Consultant shall provide a written report to the Committee or the Committee Chair at least monthly.

#### **SVEDC Staff with the assistance of the Committee shall:**

- Administer the contract with the Consultant, ensuring adherence to timelines and budget;
- Organize all meetings or planning sessions of the Committee;
- Prepare minutes of all formal Committee meetings;
- Assist with organizing community consultation, if necessary;
- Respond to inquiries from and provide advice to the Consultant; and
- Participate in all Committee meetings and planning sessions.

**The primary contact for the Consultant will be the Chair of the Committee.**

## 7. SUBMISSION DETAILS

### (1) Proposal Content

Proposals must be limited to no more than 8 pages (except for resumes, title page, and table of contents). Do not submit corporate brochures. Proposals shall be brief and contain, at a minimum, the following information:

- (a) Description of the methodology and approach to completing the tasks identified under “The Product” and “The Plan Components”.
- (b) A schedule (work plan) with anticipated timing for the work to be undertaken, including milestone dates. It is expected that the Contract will commence on **1 May, 2014**
- (c) Identification of the roles as well as the commitment, qualifications and expertise of the project manager and all team members and their estimated time to be spent on the project. The Consultant must maintain the key personnel as may be listed in the Proposal, and shall not replace any of such key personnel without the SVEDC’s prior written agreement, which agreement shall not be unreasonably withheld or denied.
- (d) A list of similar work undertaken in the last three years and the names and contact information for two recent projects.
- (e) A cost breakdown for the work to be undertaken. A cost for each of the components listed under “The Plan Components” must be included.

### (2) Fee Structure and Payment

Proponents will fully describe their proposed fee structure and must clearly quote any additional charges that may be applicable that have not already been addressed in their Proposal. The fee should include applicable taxes as a separate line item. A list of chargeable disbursements, with unit costs and an estimate of their total cost is also to be included.

As an alternative, Proponents may suggest that disbursements be paid as a percentage of the total fee (excluding Taxes), in which case the percentage must be identified, as well as the extent of disbursements covered by such percentage. Hourly and per diem rates for all staff must be provided. These rates will form the basis for agreed variations in services.

Proponents will clearly note what costs are not included or allowed for and will also allow for the mandatory meetings and notifications required for the project.

### (3) Submission

Proposals with the subject line, “RFP – Slocan Valley Community Priorities Plan”, must be sent **by email** to [slocanvalleyedc@gmail.com](mailto:slocanvalleyedc@gmail.com)

The deadline for receipt of Proposals is **Tuesday, 4 March, 2014, 4:30 pm local time**. Submissions received after this time will be returned to the sender. The onus is on the Proponent to ensure that the Proposal is received in the proper location and before the closing time. The cost of preparing and submitting Proposals shall be at the Consultants’ expense.

## 8. INQUIRIES

- (1) Clarification of terms and conditions of the Proposal process shall be directed to: Chair

SVEDC Community Directed Funds Committee  
slocanvalleyedc@gmail.com:

- (2) The Committee, the SVEDC, its agents and employees shall not be responsible for any information given by way of oral or verbal communication.
- (3) The SVEDC shall only respond to questions that are submitted **in writing**. Any questions that are received and answered by SVEDC representatives that affect the Proposal process, any interpretation of, additions to, deletions from, or any other corrections to the RFP document, may be issued as written addenda by the SVEDC. **It is the sole responsibility of the potential Proponents to check with the Chair of the SVEDC Community Directed Funds Committee to ensure that all available information has been received prior to submitting a Proposal**
- (4) Inquiries will be received up until 4:30 pm local time, **Friday, 28 February, 2014**

## 9. TERMS OF THIS REQUEST FOR PROPOSAL

- (1) Proposals shall be open for acceptance for 60 days following the Submission closing date. (2)

The SVEDC reserves the right to cancel this RFP for any reason without any liability to any Proponent or to waive irregularities at its own discretion.

- (3) Proposals may be withdrawn by written notice only provided such notice is received by the SVEDC Community Directed Funds Committee prior to the date and time set as the closing time for receiving Proposals.
- (4) Except as expressly and specifically permitted in these instructions, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the RFP, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.
- (5) Proponents are advised that the SVEDC shall not necessarily accept any Proposal and the SVEDC reserves the right to reject any or all Proposals at any time without further explanation or to accept any Proposal considered advantageous to the SVEDC.
- (6) A Proposal which contains an error, omission, or misstatement; which contains qualifying conditions; which does not fully address all the requirements of this RFP; or which otherwise fails to conform to the requirements in this RFP may be rejected in whole or in part by the SVEDC at its sole discretion.
- (7) The SVEDC may waive any non-compliance with the RFP, specifications, or any conditions including the timing of delivery of anything required by the RFP and may, at its sole discretion, elect to retain for consideration Proposals which are non-conforming, which do

not contain the content or form required by the RFP or because they have not complied with the process for Submission set out herein.

- (8) The SVEDC may choose, at its sole discretion, to proceed with all of the components of the project, none of the components or selected components of the project.
- (9) All Proposals shall remain confidential, subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

## **10. NEGOTIATIONS**

- (1) The award of the Contract is subject to negotiations with the Lead Proponent. Such negotiations include, but are not limited to, the following:
  - (a) Changes or work refinements in the service requirements or scope of work proposed by the Lead Proponent;
  - (b) Price – if directly related to a change or refinement in the proposed scope of work proposed by the Lead Proponent; and
  - (c) Specific contract details as deemed reasonable for negotiation by the RDCK.
- (2) If a written Contract cannot be negotiated within 60 days of notification to the Lead Proponent, the SVEDC may, at its discretion at any time thereafter, terminate negotiations with the Lead Proponent and either enter into negotiations with the next qualified Proponent or cancel the RFP process and not enter into a contract with any Proponent.

## **11. REVIEW OF PROPOSALS**

- (1) The RDCK shall review the Proposals submitted to determine whether, in the SVEDC's opinion, Proponents have demonstrated the required experience and qualifications to fulfill the obligations of the services identified in this RFP.
- (2) The SVEDC, in its sole discretion and without having any duty or obligation to do so, may conduct any inquiries or investigations, including but not limited to contacting client references, to verify the statements, documents, and information submitted in connection with the Proposal and may seek clarification from the Proponent's clients regarding any financial and experience issues.
- (3) Proposals shall be evaluated to determine the best value offered to the SVEDC against conformance to the following criteria:
  - (a) Approach to work plan: creativity, methodology, deliverables
  - (b) Qualification of the project team: expertise and diversity of experience
  - (c) Experience with similar projects
  - (d) Price
- (4) Preferred Proponents may be required to participate in an interview, either by telephone or in person, at the sole discretion of the Committee. **It is expected that interviews will take place between March 15 and April 15, 2014.**



## **12. NON-CONFORMING PROPOSALS**

Proposals which fail to conform to the format requirements or which fail to conform to any other requirement of this RFP may be rejected by the SVEDC. Notwithstanding the foregoing or any other provision of this RFP, the SVEDC may at its sole discretion elect to retain for consideration Proposals which deviate either materially from the format requirements set out hereto or which otherwise fail to conform to any other requirement of this RFP except the requirement of delivery of the Proposal prior to Submission deadline.

## **13. RFP PROCESS**

- (1) The SVEDC may unilaterally take the following actions, and shall not be liable for any such actions:
  - (a) amend the scope and description of the products and services to be procured as described in this RFP, and the qualifications that may be required to meet those requirements;
  - (b) reject or accept any or all Submissions;
  - (c) cancel the RFP process at any time and reject all Submissions; or
  - (d) cancel the RFP process and recommence in respect of the same RFP with the same or an amended set of documents, information and requirements.
- (2) The Proponent acknowledges and agrees that any RFP is in no way whatsoever an offer to enter into an agreement and Submission of a Proposal by any Proponent does not in any way whatsoever create a binding agreement. The Proponent acknowledges that the SVEDC has no contractual obligations whatsoever arising out of the RFP process.

## **14. WORKING AGREEMENT**

The Successful Proponent shall enter into a Contract with the SVEDC based upon the information contained in this RFP and the Successful Proponent's Submission and any modifications thereto.

## **15. INFORMATION DISCLAIMER**

- (1) The SVEDC and its directors, officers, employees, agents, consultants and advisors are not liable or responsible for any verbal or written information, or any advice, or any errors or omissions, which may be contained in this RFP or otherwise provided to any Proponent pursuant to this RFP.
- (2) The Proponent shall conduct its own independent investigations and interpretations and shall not rely on the SVEDC with respect to information, advice, or documentation provided by the SVEDC. The information contained in this RFP is provisional and shall be superseded by other agreement documents.

- (3) The SVEDC makes no representation, warranty, or undertaking with respect to this RFP and the SVEDC and its directors, officers, employees, agents, consultants and advisors, shall not be liable or responsible for the accuracy or completeness of the information in this RFP or any other written or oral information made available to any interested person or its advisors, and any liability however arising, is expressly disclaimed by the SVEDC.