



REQUEST for PROPOSALS

**To Draft a New Official Community
Plan for the District of Lillooet**

The Request for Proposals closes February 7, 2020
Issued December 16, 2019

1.0 INVITATION

The District of Lillooet (District) invites planning consulting firms to submit a proposal to conduct a comprehensive public and stakeholder engagement process and using the inputs obtained, produce a new Official Community Plan. The maximum budget for this proposal is \$90,000.

Not a Tender Call

This RFP is not a tender call, and the submission of any response to this RFP does not create a tender process. This RFP is not an invitation for an offer to contract, and it is not an offer to contract made by the District. By this RFP, the District reserves to itself the absolute discretion to invite submissions, consider and analyze submissions, select short-listed proponents or attempt to negotiate an agreement with the successful proponent, as the District considers desirable.

2.0 CLOSING

Proposals shall be received by the District of Lillooet before **2:00 p.m.** local time on **February 7, 2020**, according to the instruction in the RFP.

3.0 BACKGROUND and PURPOSE

The District of Lillooet's OCP was adopted in 2009. A Regional Growth Strategy was adopted in 2008 and updated in 2019. The District wishes to engage the community and draft a new and updated OCP that reflects current aspirations of the community

4.0 PROPONENT'S TEAM

The successful proponent in this proposal call (the Consultant) will provide a team of specialists who can provide all required services and complete the assignment within the specified time frame. Proposals must include the names of the people intended to complete the work along with a brief resume of each person and the budgeted time allotted for each person. Proposals should include a list of recent similar projects completed by the proponent and a list of references.

5.0 SCOPE OF WORK

The project will include the following phases:

1. Review current OCP
2. Review the Regional Growth Strategy
3. Review the Senior Housing & Age Friendly Community Action Plan
4. Review OCP map
5. Review community context
 - topography
 - Agricultural Land Reserve
 - demographics
 - community issues
6. Develop and undertake a public/stakeholder engagement strategy which may include
 - public/stakeholder issue identification process
 - public/stakeholder workshops
 - public/stakeholder open houses
 - web presence with information and input opportunities
 - social media presence and/or engagement
 - specific strategy for engaging First Nations
 - specific strategy for engaging youth
7. Present findings from public/stakeholder engagement process
 - Issues identified and their priority
8. Create an OCP document in both PDF and paper copy.
9. Create OCP Map in Arc GIS format (or other format approved by the district) that includes recommended mapping changes

Issues of particular interest include;

- ✓ Early, ongoing and meaningful consultation with neighbouring First Nations bands
- ✓ Green Infrastructure and walkability
- ✓ Food Security
- ✓ Hazard Identification

6.0 ASSIGNMENT DELIVERABLES

The consultant is responsible for providing the District with the following items:

- An initial written document identifying the proposed public/stakeholder engagement strategy.
- Draft content for engagement processes and public events including:
 - questionnaires/surveys
 - exercise materials
 - story boards
 - interactive input techniques
- Final content for public engagement processes and hosting public events.
- A document detailing issues identified through the public process and their priority including a rating matrix.
- Draft OCP document.
 - Including digital OCP Map in approved format
- Present Draft OCP document at Public Council Meeting
- Final OCP document
 - In MS Word, PDF and paper formats

- Including digital OCP Map in approved format
- Present Final OCP document at Public Council Meeting

7.0 ASSIGNMENT SCHEDULE (preliminary)

| | |
|-----------------------------|--------------------------------------|
| Request for Proposal Issued | December 16, 2019 |
| RFP Closing Date | February 7, 2020 at 2:00 P.M. |
| Anticipated Contract Award | March 2, 2020 |
| Commencement of project | March 9, 2020 |
| Total Completion | November 6, 2020 |

8.0 CONTENTS OF THE PROPOSAL

Proponents must satisfy the following requirements in their Proposal in accordance with the requirements of the RFP. **Proponents who fail to satisfy these mandatory requirements may in the absolute discretion of District not be considered further.**

Proponents shall submit the following:

- 1) Name and address of the consulting firm.
- 2) Name of each team member noting which team member is responsible for specific tasks
- 3) Resume of each team member including client references and time allocated to the project
- 4) Name and address of any subcontractors
- 5) Proposed work schedule including start and completion dates
- 6) Total fee for service including all taxes, travel expenses, and other disbursements
- 7) Evidence that the Proponent team has completed at least three (3) previous assignments of similar type, size, and complexity.

In addition to the other information and representations made by each Proponent in the Proposal Compliance form (Schedule A), each Proponent will be assessed based upon whether or not it has an actual or potential Conflict of Interest as defined in the Terms and Conditions of this RFP, and if so, does that conflict prevent the Proponent from being awarded the contract.

If the Proponent does not disclose any information concerning Conflict of Interest in the Proposal Compliance form, the Proponent, by submitting the Proposal, warrants that to its best knowledge and belief no actual or potential Conflict of Interest exists with respect to the Proposal or performance of the contemplated Contract.

9.0 EVALUATION

Proposals will be reviewed and evaluated by the District in accordance with the following criteria.

| Evaluation Criteria | Total Value 100 points |
|--|-------------------------------|
| Principal Consultant's Experience <ul style="list-style-type: none">• Related experience, capability, and background of the consultant named as the principal contact leading this assignment. | OK/Not Ok |
| Project Team Members Experience <ul style="list-style-type: none">• Experience, capability, and professional standing of each key participant on Proponent's team. | OK/Not OK |
| Proposed Comparable Project / Assignment <ul style="list-style-type: none">• Suitability of the Proponent's Proposed Comparable Project / Assignment to the experience required for this assignment. | 20 points |
| Public Engagement Strategy and Methodology <ul style="list-style-type: none">• Comprehensiveness of the proposed strategy and likelihood of success in reaching the most diverse community members. | 50 points |
| Proposal Quality <ul style="list-style-type: none">• Organization, clarity, and quality of the Proposal and demonstrated understanding of the assignment. | 5 points |
| Fixed Fee <ul style="list-style-type: none">• Cost related to service provided for complete project• Cost related to mapping component | 25 points |

10.0 SUBMISSION INSTRUCTIONS

3 copies of proposals in a paper format and 1 digital PDF copy are to be submitted to the District in a sealed envelope at the following address:

District of Lillooet
Box 610
615 Main St
Lillooet, BC V0K 1V0

Attention: Corporate Officer

Proposals will be time stamped at the reception desk upon receipt. Proposals received after the deadline will be returned unopened. Emailed proposals will not be accepted.

11.0 QUESTIONS DURING PROPOSAL CALL PERIOD

Direct all questions regarding RFP documents in writing during the proposal call period to:

Ian McIntosh,
Planning Consultant

Telephone: (250) 809-7513

Email: ian.mcintosh44@gmail.com

Proponents are advised that the Planning Consultant is the only District representative with whom they are permitted to communicate and discuss issues with regarding this RFP. Any contact, other than minor incidental contact, with any other District representative, including members of the Council and District officers or employees, regarding this RFP or the proponent's submission, will result in the proponent's submission being removed from consideration.

All communication from Proponents in respect to this RFP will cease at 12:00 noon on February 3, 2020.

Addenda

During the proposal period, Proponents may be advised by written addenda of required additions, deletions, or alterations to requirements of the RFP. Addenda will be distributed to Proponents by facsimile using the information provided to District when the RFP document was obtained from District's offices.

Only those instructions that are confirmed by addenda shall become an integral part of the RFP and shall be considered in arriving at the Fixed Fee. Proponents shall state the numbers of Addenda received during the proposal period including any bound into the RFP Documents in the space provided on the Proposal Compliance Form. If no Addenda have been received, signify none in the space provided with a zero.

12.0 FIXED FEE INFORMATION

All fee information requested in the Fixed Fee Proposal Form (Schedule B), including the fixed fee, individual prices, and schedule of hourly charge rates for additional Services, must be completed where shown, without exception.

Payments will be made monthly, based upon satisfactory completion of Work or portion thereof and submittal of acceptable deliverables, and in accordance with the Fixed Fee Proposal Form (Schedule B).

The Fixed Fee Proposal must include the cost of all disbursements necessary to complete the work. These disbursements include but are not limited to accommodation, travel, communication costs, meals, hospitality, printing, photocopying, and all related consulting overheads. Other disbursement costs in addition to the Proponent's Fixed Fee Proposal will not be permitted. The Proponent acknowledges that its Fixed Fee Proposal includes the cost to complete all work described herein including presentations and travel, and that some deviation from the work as described is normal and expected, and has been factored into the Fixed Fee Proposal.

Where the Consultant receives written instructions from the District to provide consulting services, which are in addition to the services described in the Scope of Work Section, the services shall be provided at the hourly rates quoted in the Fixed Fee Proposal form. Any claim for extra Work to the Assignment must be approved in writing by the District, and extra Work shall not commence without the District's approval.

Payment for disbursements related to additional work would be paid at cost based upon the District's acceptance of receipts that are provided by the Consultant.

13.0 TERMS AND CONDITIONS

Compliance with Laws of British Columbia The Proponent assumes responsibility to ensure that it is in compliance with all laws and regulations concerning its eligibility to submit a Proposal and perform work in British Columbia.

Clarification of Proposals The District reserves the right to seek clarification of the contents of any Proposal, or to require a Proponent to submit further documentation, and to seek the respective Proponent's acknowledgement of that interpretation. The District may waive requirements of the RFP at its discretion where it deems it appropriate to do so. The District may choose to meet with some or all of the Proponents to discuss aspects of their respective Proposals; however, the District is not obligated to seek clarification of any aspect of a Proposal. The supplementary documentation accepted by the District and written interpretations, which have been acknowledged by the affected Proponent, shall be considered as part of their Proposal.

Accuracy of Information in the RFP The District, its Consultants, and its advisors do not make any representation or warranty as to the accuracy or completeness of any information provided. Proponents shall make their own enquiries and investigations regarding any matter that may affect the accuracy or pricing of their Proposal.

Verification of Proponent's Information The District reserves the right to verify any information from third parties and receive additional information regarding the Proponent, its directors,

officers, shareholders/owners, and any other party associated with the Proposal as the District may require.

Confidentiality All documentation and information obtained from Proponents in connection with this RFP are the property of the District and must be treated as confidential and shall not be used for any other purpose other than responding to this RFP or fulfilling any subsequent Contract, if awarded. The Proposal and any accompanying documentation submitted by the Proponents shall become the property of the District and shall not be returned. The Proposal and any accompanying documentation shall be subject to the provisions of the

Freedom of Information and Protection of Privacy Act Proponents should identify any information in the Proposals for which confidentiality is to be maintained by the District. Confidentiality of such information will be maintained by the District, except where an order by the Information and Privacy Commission or a court requires the District to do otherwise.

District Rights in Respect to the RFP This RFP does not constitute an offer of any nature or kind whatsoever by the District to the Proponents. The District does not bind itself to accept any Proposal and may proceed as it, in its sole discretion, determines following receipt of the Proposals. The District reserves the right to accept any Proposal in whole or in part or to discuss with any Proponent, different or additional terms to those envisaged in this RFP or in such Proponent's Proposal.

The District has the right:

- To cancel the RFP at any time without liability whatsoever to any Proponent;
- To reject any or all of the Proposals;
- To accept any or all of the Proposals;
- If only one Proposal is received, elect to accept or reject it;
- Not to accept the lowest Fixed Fee Proposal; or
- To alter the schedule, RFP process, procedures, or objective of the Project or any other aspect of the RFP, as it may determine in its sole and absolute discretion.

It is the nature of this RFP process that this RFP and/or the Proposal in response to the RFP will not constitute a binding agreement, but will only form the basis for the finalization of the terms upon which the District and the chosen Consultant will enter into the Consulting Agreement, and does not mean that the Proposal is necessarily totally acceptable in the form submitted. After the selection of the Proposal, if any, the District has the right to negotiate with the Consultant and, as part of that process, to negotiate changes, amendments, or modifications to the Proposal without offering the other Proponents the right to amend their Proposal.

Proponents' Costs All costs and expenses incurred by a Proponent related to the preparation or presentation of its Proposal shall be borne by the Proponent. The District is not liable to pay such costs and expenses or to reimburse or to compensate a Proponent under any circumstances.

Delay The District shall not be responsible for any delays or cost to Proponents associated with any reviews or the approval process.

Additional Information Any written information received by the District from a Proponent pursuant to a request from the District as part of the RFP process, shall be considered as an integral part of the Proposal.

Approval to Publicize No media or news release, article, or other literature pertaining to this RFP and subsequent Contract shall be issued without the prior written approval of the District.

Ownership of Proposal Materials All materials submitted in response to any part of this RFP shall become the sole property of the District without payment or liability for payment. The District reserves the right to use and publish ideas, information, and concepts contained in the Proposals, except to the extent that they are covered by copyright, patent, or industrial design protection.

Changes to the RFP The District may modify, amend, or revise any provision of this RFP or issue any addenda at any time. Any modification, amendment, revision, or addendum will be issued in writing and will be provided to all Proponents. If it becomes necessary to revise any part of this RFP, or if the Proponents require additional data to interpret any of its provisions, the revisions or additional data will be provided to all Proponents. No verbal information or instruction shall be considered as binding until confirmed by written addendum. Revisions confirmed in writing will form part of the RFP.

Joint Venture Signatures If the Proponent is a joint venture or consortium, a representative of each participating entity must sign the Proposal.

Conflict of Interest Each Proponent must include in its Proposal confirmation of the following:

1. That the Proponent does not and will not have any Conflict of Interest (actual or potential) in submitting its Proposal or, if selected, with the contractual obligations of the Proponent as Consultant under the Agreement. Where applicable, a Proponent must declare in its Proposal any situation that may be a Conflict of Interest in submitting its Proposal or, if selected, with the contractual obligations of the Proponent as Consultant under the Agreement;

“Conflict of Interest”, for the purpose of this RFP and the Proposal Compliance form, means:

- a. an unfair advantage over other Proponents during the procurement process, thereby rendering the process non-competitive and unfair (e.g., Proponent has Confidential Information not available to other Proponents);
- b. activities, relationships, or contracts which render the Proponent unable or potentially unable to perform the duties and obligations required of the Proponent if awarded the Contract; or
- c. activities, relationships, or contacts which impair or potentially impair the Proponent’s judgment in performing the Proponent’s duties and obligations under the Contract.

2. That the Proponent neither has, nor has access to, any Confidential Information as defined below;

“Confidential Information” refers to confidential information of the Crown or of the District (other than confidential information which is disclosed to proponents in the normal course of the Request for Proposal) where the Confidential Information is relevant to the Services required by the Request for Proposals, their pricing or the Request for Proposal evaluation process.

Sub-Consultants The Proponent shall disclose in the Proposal the names of all Sub-Consultants that it intends to use in performing Services.

Changes to Proponent’s Team The District reserves the right to approve changes in the management and/or ownership structure of a Proponent’s team after receipt of its Proposal.

Notification to Unsuccessful Proponents Unsuccessful Proponents will be notified in writing after the award of the Contract.

Commencement of Work The successful Proponent will be notified in writing, whereupon the Proponent will be required to sign an agreement for the services described herein and will begin Work within 5 days, or within a time agreed upon with the District.

Proof of Insurance The successful Proponent shall, as a condition of award, submit proof of insurance in the form of valid certificates of insurance to the District, on or before the commencement of work. The certificates of insurance shall confirm the coverage set out in the Agreement.

END OF INSTRUCTION TO PROPONENTS

SCHEDULE A
PROPOSAL COMPLIANCE FORM
Page 1 of 5

To provide consulting services to **Draft a New Official Community Plan for the District of Lillooet** according to the requirements of the Request for Proposals.

1 A. PROPONENT INFORMATION

Name of Proponent

Project Contact

Street Address of Proponent's head office
or registered office

Telephone

City

Postal Code

Facsimile Number

Name and Title of all persons who control the above corporation.

Name

Title

Where additional names of persons who control the corporation are to be provided, the Proponent shall include the information on an attached sheet.

SCHEDULE A
PROPOSAL COMPLIANCE FORM
Page 2 of 5

1 B. JOINT VENTURE OR PARTNERSHIP INFORMATION

Where the Proponent named above is a joint venture or partnership, provide the following information for both partners either corporate or individual. If there are more than two partners to the joint venture or partnership, provide the same information separately for additional partners.

Name of Partner

Name of Partner

For Corporate Partners:
Street Address of Partner's head office
or registered office.

For Corporate Partners:
Street Address of Partner's head office
or registered office.

For Individual Partners:

City Postal Code

City Postal Code

Telephone Facsimile

Telephone Facsimile

Where additional names of partners in joint venture who control the corporation are to be provided, the Proponent shall include the information on an attached sheet.

I/We hereby submit our proposal of services for Zoning Bylaw Review and Update as described in the Request For Proposal, and a quote of hourly rates for additional services.

I/We understand the lowest of any proposal will not necessarily be accepted.

I/We have carefully examined all Request For Proposal documents and have a clear knowledge of the assignment, and that by submitting this Proposal Compliance Form, I/we agree to all terms and conditions of the Request for Proposal dated, **December 16, 2019**.

SCHEDULE A
PROPOSAL COMPLIANCE FORM
Page 3 of 5

I/We agree, for the upset limit fee stated separately on the Fixed Fee Proposal form and contained in the separately sealed envelope, to supply all labour, materials, and services for the execution and completion of the assignment in accordance with the Request For Proposal.

I/We agree to provide additional consulting services when requested in writing by the District for the duration of the assignment, to be performed by the same firms/individuals proposed and accepted for the assignment at the hourly rates stated in Schedule B – Fixed Fee Proposal.

I/We agree at the District's request to redistribute the timing of the delivery of the services to suit the progress of the assignment and the project with no increase in the fee.

I/We submit the requested information outlining the team organization and deployment of resources, experience of the firm and references, qualifications of the prime contact, and team qualifications.

I/We recognize that the information and references submitted may be investigated and that pertinent information may be obtained, and hereby consent to such investigation.

Conflict of Interest

"Confidential Information" and "Conflict of Interest", for the purpose of this form, are defined in this RFP, Terms and Conditions.

Check the appropriate box below:

- I/We hereby confirm that there is not nor was there any actual or perceived Conflict of Interest or any other type of unfair advantage in our submitting the Proposal or performing or observing the contractual obligations of the Consultant in the Agreement.

[or]

- The following is a list of situations, each of which may be a Conflict of Interest or an instance of unfair advantage in our company submitting the Proposal or the contractual obligations of the Consultant under the Agreement.

**SCHEDULE A
PROPOSAL COMPLIANCE FORM**

Page 4 of 5

In submitting the Proposal:

Check the appropriate box below:

- Our company **has no knowledge** of or the ability to avail ourselves of Confidential Information of the Crown or of the District (other than confidential information which may have been disclosed by the District to the Proponents in the normal course of the Request for Proposal) and the confidential information was relevant to the work, its pricing, or the Request for Proposal evaluation process.

[or]

- Our company has knowledge of or the ability to avail ourselves of confidential information of the Crown or of the District (other than confidential information which may have been disclosed by the District to the Proponents in the normal course of the Request for Proposal) and the confidential information was relevant to the Work, its pricing, or the Request for Proposal evaluation process.

The following individuals, as employees, advisors, or in any other capacity participated in the preparation of our Proposal.

| | |
|--|--|
| Name of Individual | |
| Job Classification (of last position with the District) | |
| Late Date of Employment with the District | |
| Name of Last Supervisor with the District | |
| Brief Description of Individual's Job Functions (at last position with the District) | |
| Brief Description of Nature of Individual's Participation in Preparation of Proposal | |

(Repeat above for each identified individual)

I/We agree that, upon request, I/we shall provide the District with a Conflict of Interest Declaration from each individual identified above in the form prescribed by the District.

**SCHEDULE A
PROPOSAL COMPLIANCE FORM**

Page 5 of 5

I/We agree to sign a legal agreement within seven (7) calendar days of acceptance of this Proposal and to commence the Work immediately after the agreement is signed and to carry it to a satisfactory conclusion, within the time allowed in this Proposal.

I/We understand that the fixed fee submitted in Schedule B – Fixed Fee Proposal, and contained in the separate sealed envelope is based upon acceptance of the Proposal within sixty (60) days of the closing date established by the District for the receipt of Proposals.

I/We understand that any omission or failure to answer questions included herein may result in my/our being disqualified from further consideration in this Request For Proposal.

I/We have received and allowed for addenda numbered ___ to ___ in preparing this Proposal Compliance Form.

DATE

NAME OF PROPONENT

SIGNATURE OF COMPANY OFFICIALS
Provide a signature for each official in joint venture

SIGNATURE OF COMPANY OFFICIALS
Provide a signature for each official in joint venture

SIGNATURE OF COMPANY OFFICIALS
Provide a signature for each official in joint venture

NOTE: This Proposal Compliance Form must not contain any information relating to the proposal fee.

SCHEDULE B
FIXED FEE PROPOSAL FORM
Page 1 of 3

To provide design and construction management services to **Draft a New Official Community Plan for the District of Lillooet** according to the requirements of the Request for Proposals.

1.0 FIXED FEE PROPOSAL

I/We hereby offer to provide to the District of Lillooet all services, labour, and materials required to complete the assignment described in the Request For Proposal dated December 16, 2019, **including the cost of all related disbursements as described in the RFP**, for the Fixed Fee of:

\$ _____ **Canadian Dollars**

Name of Proponent: _____

**SCHEDULE B
FIXED FEE PROPOSAL FORM**

Page 2 of 3

2.0 ADDITIONAL FIXED FEE INFORMATION

I/We agree to provide additional consulting services from the individuals named in my/our Proposal, upon receiving instructions in writing from the District for the hourly rates stated below until completion of the assignment. The hourly rates for additional consulting services for work related to the Assignment includes British Columbia retail Sales tax where applicable, but does not include the Goods and Services tax. Related and verified disbursements will be paid at cost.

| Discipline | | Hourly Charge Rate |
|------------------------------------|----------|---------------------------|
| Prime Consultant (Senior) | \$ _____ | per hour |
| Prime Consultant (Intermediate) | \$ _____ | per hour |
| [Insert Consultant] | \$ _____ | per hour |
| [Insert Consultant] | \$ _____ | per hour |
| [Insert Consultant] | \$ _____ | per hour |

Name of Proponent: _____

**SCHEDULE B
FIXED FEE PROPOSAL FORM**

Page 3 of 3

NAME OF PROPONENT

SIGNATURE OF COMPANY OFFICIALS
Provide a signature for each official in joint venture

SIGNATURE OF COMPANY OFFICIALS
I have the authority to bind the Proponent

DATE

SCHEDULE D PROPOSED COMPARABLE PROJECT

- a) Identify one selected project from Schedule C which best exemplifies the requirements and objectives to:

Draft a New Official Community Plan for the District of Lillooet

Example Project Name: _____

Location: _____ Value: _____

- b) Provide a description with reasons why your selected project best exemplifies the requirements and objectives to: **Draft a New Official Community Plan for the District of Lillooet.**

Schedule E

SUBMISSION RETURN LABEL

**To: District of Lillooet
Attention: Ian McIntosh
Draft a New Official Community Plan for the District of Lillooet**

Proponent's name and address