



Islands Trust

Request for Proposals No. RFP-2024.008

Salt Spring Official Community Plan & Land Use Bylaw Amendment Project

Issued: *January 24, 2025*

Closing Date and Time:

Proposals must be received before 2:00PM Pacific Time
on: *February 20, 2025*

Contact:

Questions are to be directed (at least 24 hrs before the closing time) to:

procecon@gov.bc.ca

Request for Proposals No. RFP-2024.008 - Salt Spring Official Community Plan & Land Use Bylaw Amendment Project



Request for Proposals

Ministry: ISLANDS TRUST | RFP Number: [RFP-2024.008](#)
Issue date: [January 24, 2025](#)

Closing Time: Proposals must be received **before 2:00 PM Pacific Time** on: [February 20, 2025](#)

DELIVERY OF PROPOSALS: Proposals must be in English and must be submitted using one of the submission methods below, and must either (1) include a copy of this page that is signed by an authorized representative of the Proponent or (2) otherwise identify the RFP, identify the Proponent and include the signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound, or (3) be submitted by using the e-bidding key on BC Bid (if applicable), in accordance with the requirements set out in Section 2.2:

BC Bid Electronic Submission: Proponents may submit an electronic proposal using BC Bid. Proposals must be submitted in accordance with the BC Bid requirements and e-bidding key requirements (found at www.bcbid.ca). Only pre-authorized electronic bidders registered on the BC Bid system can submit an electronic proposal using the BC Bid system. Use of an e-bidding key is effective as signature.

Email Submission: Proponents may submit an electronic proposal by email. Proposals submitted by email must be submitted to procecon@gov.bc.ca in accordance with the instructions at Section 2.3 of this RFP.

Regardless of submission method, proposals must be received before Closing Time to be considered.

A proposal is deemed to incorporate the Confirmation of Proponent’s Intent to Be Bound below, without alteration.

CONFIRMATION OF PROPONENT’S INTENT TO BE BOUND:

The enclosed proposal is submitted in response to the referenced Request for Proposals, including any Addenda. By submitting a proposal, the Proponent agrees to all of the terms and conditions of the RFP including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposals;
- b) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the proposal; and
- c) The Proponent agrees to be bound by the statements and representations made in its proposal.

PROPONENT NAME (please print): _____

NAME OF AUTHORIZED REPRESENTATIVE (please print): _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

DATE (please print): _____

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A Proponents' meeting **will not** be held.

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1 SUMMARY OF THE REQUEST

The Salt Spring Island Local Trust Committee (SSI LTC) is seeking consulting services to lead the amendment of the Salt Spring Island Local Trust Committee Official Community Plan Bylaw No.434, 2008 (OCP) and Salt Spring Island Local Trust Committee Land Use Bylaw No. 355, 1999 (LUB), otherwise known as the “OCP-LUB Project”. The work will include refinement of the provided Scope of Services, development of project management systems, and the design and execution of a bylaw review program that incorporates significant public and interest holder engagement and delivers revised bylaw documents and reports. The premise of the OCP-LUB Project is centred on addressing Salt Spring Island’s housing availability and affordability crisis, with consideration of First Nations engagement, ecosystem integrity and connectivity, and climate change. The purpose of the RFP is to invite qualified consultants to provide leadership in the development of these products in a sustained policy development program.

Islands Trust is now soliciting submissions from qualified firms to lead the Salt Spring OCP-LUB Project, working closely together with Islands Trust staff. This work must be completed by March 31, 2026, consistent with the Scope of Services identified in this RFP. The expected budget for this contract is \$174,000. This contract award is based on budget approval.

Milestones	Schedule
RFP closing date	February 20, 2025 at 2:00 p.m.
Award Contract	March 21, 2025
Estimated Kick off meeting	April 1, 2025
Final deliverables due	February 30, 2026
Contract ends	March 31, 2026

Further details related to the scope and requirements of this opportunity can be found within this RFP.

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2 RFP PROCESS RULES

2.1 Definitions

Throughout this Request for Proposals, the following definitions apply:

“Addenda” means all additional information regarding this RFP including amendments to the RFP;

“BC Bid” means the BC Bid website located at www.bcbid.ca;

“Closing Location” includes the location or email address for submissions indicated on the cover page of this RFP, or BC Bid, as applicable;

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by the Province and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with the Province;

“Government Contact” means the individual named as the contact person for the Province in the RFP;

“Government Electronic Mail System” or **“GEMS”** means the electronic mail system of the Province;

“Ministry” means the Islands Trust.

“must”, or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;

“Proponent” means a person or entity (excluding its parent, subsidiaries or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP;

“proposal” means a written response to the RFP that is submitted by a Proponent;

“Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes the Ministry and Islands Trust;

“Request for Proposals” or **“RFP”** means the solicitation described in this document, including any attached or referenced

appendices, schedules or exhibits and as may be modified in writing from time to time by the Province by Addenda;

“should”, “may” or **“weighted”** means a requirement having a significant degree of importance to the objectives of the Request for Proposals; and

“Tax Verification Letter” means a letter issued by the Province’s Ministry of Finance to verify that a Proponent meets its applicable B.C. corporate income tax filing obligations and provincial sales tax (PST) filing and payment obligations, which may be required to be produced by a Proponent as a condition of Contract finalization, as described in Section 2.29.

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent’s proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound. For proposals submitted via BC Bid attachment of the e-bidding key to an electronic proposal constitutes the signature of an authorized representative of the Proponent and is acceptable without additional signature.

2.3 Submission of Proposals

a) Proposals must be submitted before Closing Time to the Closing Location using one of the submission methods set out on the cover page of this RFP. Proposals must not be sent by fax, except in the circumstances set out below. The Proponent is solely responsible for ensuring that, regardless of submission method selected, the

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Province receives a complete Proposal, including all attachments or enclosures, before the Closing Time.

b) For electronic submissions (BC Bid or email), the following applies:

(i) The Proponent is solely responsible for ensuring that the complete electronic Proposal, including all attachments, is received before Closing Time;

(ii) The maximum size of each attachment must be 20 MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent's internet service provider);

(iii) Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum size, the Proponent may make multiple submissions (BC Bid upload or multiple emails for the same opportunity) to reduce attachment file size to be within the maximum applicable size; Proponents should identify the order and number of emails making up the email proposal submission (e.g. "email 1 of 3, email 2 of 3...");

(iv) For email proposal submissions sent through multiple emails the Province reserves the right to seek clarification or reject the proposal if the Province is unable to determine what documents constitute the complete proposal;

(v) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. The Province may reject proposals that are

compressed, cannot be opened or that contain viruses or malware or corrupted attachments.

c) Only pre-authorized e-bidders registered on BC Bid can submit electronic bids on BC Bid. BC Bid is a subscription service (\$150 per year) and the registration process may take two business days to complete. If using this submission method, Proponents should refer to the BC Bid website or contact BC Bid Helpdesk at 250-387-7301 for more information. An electronic proposal submitted on BC Bid must be submitted using the e-bidding key of an authorized representative of the Proponent. Using the e-bidding key of a subcontractor is not acceptable.

d) For email proposal submissions, including any notices of amendment or withdrawal referred to in Section 2.9, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.

e) The Province strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before Closing Time.

f) The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the Proponent's computer and the Government Electronic Mail System or BC Bid.

g) While the Province may allow for email proposal submissions, the Proponent acknowledges that email transmissions are inherently unreliable. The Proponent is solely responsible for ensuring that its complete email proposal submission and all attachments have been received before Closing Time. If the Government Electronic Mail System rejects an email proposal submission for any reason, and the Proponent does not resubmit its proposal by the same or other permitted submission method before Closing Time, the Proponent will not be permitted to resubmit its proposal after Closing Time. The Proponent is strongly advised to contact the Government

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Contact immediately to arrange for an alternative submission method if:

- (i) the Proponent's email proposal submission is rejected by the Government Electronic Mail System; or
- (ii) the Proponent does not receive an automated response email from the Province confirming receipt of the email and all attachments within a half hour of the time the email proposal submission was sent by the Proponent.

An alternate submission method may be made available, at the Province's discretion, commencing one half hour before the Closing Time, and it is the Proponent's sole responsibility for ensuring that a complete proposal (and all attachments) submitted using an approved alternate submission method is received by the Province before the Closing Time. The Province makes no guarantee that an alternative submission method will be available or that the method available will ensure that a Proponent's proposal is received before Closing Time.

2.4 Additional Information

All Addenda will be posted on BC Bid. It is the sole responsibility of the Proponent to check for Addenda on BC Bid. Proponents are strongly encouraged to subscribe to BC Bid's email notification service to receive notices of Addenda.

2.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated. In case of a dispute, the proposal receipt time as recorded by the Province at the Closing Location will prevail whether accurate or not.

2.6 Proposal Validity

Proposals will be open for acceptance for at least 90 days after the Closing Time.

2.7 Firm Pricing

Prices will be firm for the entire Contract period unless the RFP specifically states otherwise.

2.8 Completeness of Proposal

By submitting a proposal, the Proponent warrants that, if the RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.9 Changes to Proposals

By submitting a clear and detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time. Unless the RFP otherwise provides, Proponents should use a consistent submission method for submitting proposals and any amendments or withdrawals. Upon Closing Time, all proposals become irrevocable. The Proponent will not change any part of its proposal after the Closing Time unless requested by the Province for purposes of clarification.

2.10 Conflict of Interest/No Lobbying

- a) A Proponent may be disqualified if the Proponent's current or past corporate or other interests, or those of a proposed subcontractor, may, in the Province's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any

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circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

- b) A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor or representative of the Province, including members of the evaluation committee and any elected officials of the Province, or with the media, may result in disqualification of the Proponent.

2.11 Subcontractors

- a) Unless the RFP states otherwise, the Province will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. The Province will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed sub-contractors, if applicable.
- b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.
- c) A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, may, in the Province's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor or representative of the Province involved in preparation of the RFP, participating on the evaluation

committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

- d) Where applicable, the names of approved subcontractors listed in the proposal will be included in the Contract. No additional subcontractors will be added nor other changes made to this list in the Contract without the written consent of the Province.

2.12 Evaluation

- a) Proposals will be assessed in accordance with the evaluation criteria. The Province will be under no obligation to receive further information, whether written or oral, from any Proponent. The Province is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.
- c) The Province may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.

2.13 Contract

- a) By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the Province on substantially the same terms and conditions set out in Appendix A and such other terms and conditions to be finalized to the satisfaction of the Province, if applicable.
- b) Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or

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services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.14 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to the Province within thirty days of notification of the successful Proponent, the Province may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

2.15 Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Proponents may request a debriefing meeting with the Province.

2.16 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with the Province, if any. The Province will not be liable to any Proponent for any claims, whether for costs, expenses, damages or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.17 Limitation of Damages

By submitting a proposal, the Proponent agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

2.18 Liability for Errors

While the Province has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.19 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP does not commit the Province in any way to award a Contract.

2.20 No Implied Approvals

Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

2.21 Legal Entities

The Province reserves the right in its sole discretion to:

- a) disqualify a proposal if the Province is not satisfied that the Proponent is clearly identified;
- b) prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to the Province that the Proponent has the power and capacity to enter into the Contract;
- c) not to enter into a Contract with a Proponent if the Proponent cannot satisfy the Province that it is the same legal entity that submitted the Proponent's proposal; and
- d) require security screenings for a Proponent who is a natural person, subcontractors and key personnel before entering into a Contract and

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decline to enter into a Contract with a Proponent or to approve a subcontractor or key personnel that fail to pass the security screenings to the Province's satisfaction.

2.22 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, the Province reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering into a Contract with a Proponent;
- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to waive any non-material irregularity, defect or deficiency in a proposal;
- d) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and consider such clarifications in evaluating the proposal;
- e) to reject any proposal due to unsatisfactory references or unsatisfactory past performance under contracts with the Province, or any material error, omission or misrepresentation in the proposal;
- f) at any time, to reject any or all proposals; and
- g) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

2.23 Ownership of Proposals

All proposals and other records submitted to the Province in relation to the RFP become the property of the Province and, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and the RFP, will be

held in confidence. For more information on the application of the Act, go to http://www.cio.gov.bc.ca/cio/priv_leg/index.page.

2.24 Copyright

This document is subject to copyright and may be used, reproduced, modified and distributed to the extent necessary for the Proponent to prepare and submit a proposal.

2.25 Confidentiality Agreement

The Proponent acknowledges that prior to the Closing Time it may be required to enter into a confidentiality agreement with the Province in order to obtain access to confidential materials relevant to preparing a proposal.

2.26 Alternative Solutions

If more than one approach to deliver the services described in the RFP are offered, Proponents should submit the alternative approach in a separate proposal.

2.27 Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If the RFP requires Proponents to provide the Province with personal information of employees who have been included as resources in response to the RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents should specify that the personal information may be forwarded to the Province for the purposes of responding to the RFP and used by the Province for the purposes set out in the RFP. The Province may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the Province.

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2.28 Trade Agreements

This RFP is covered by the following trade agreements:

- a) Trade, Investment and Labour Mobility Agreement;
- b) New West Partnership Trade Agreement;
- c) Canadian Free Trade Agreement;

For more information, Proponents may contact the Government Contact.

2.29 Tax Verification Letter

- a) As a condition of Contract finalization as described in Section 2.14, the successful Proponent (or any successor to that Proponent) will be required to provide the Ministry with a valid Tax Verification Letter, unless an exception applies as described below. If a Proponent is not able to produce the required Tax Verification Letter during Contract finalization, then the Province will be entitled to terminate discussions with that Proponent and proceed as described in Section 2.14.
- b) A Tax Verification Letter will not be required if:
 - (i) the Contract is valued at *less than* CAN\$100,000, including all fees, expenses and all options to extend or renew the Contract; or
 - (ii) the Contract is in relation to a government transfer as described in Chapter 21 of the Province's Core Policy and Procedures Manual.
- c) If a Tax Verification Letter is required, the Contract will contain, in addition to all other applicable schedules, a schedule that describes the Tax Verification Letter requirements of the Contract.

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3 OVERVIEW

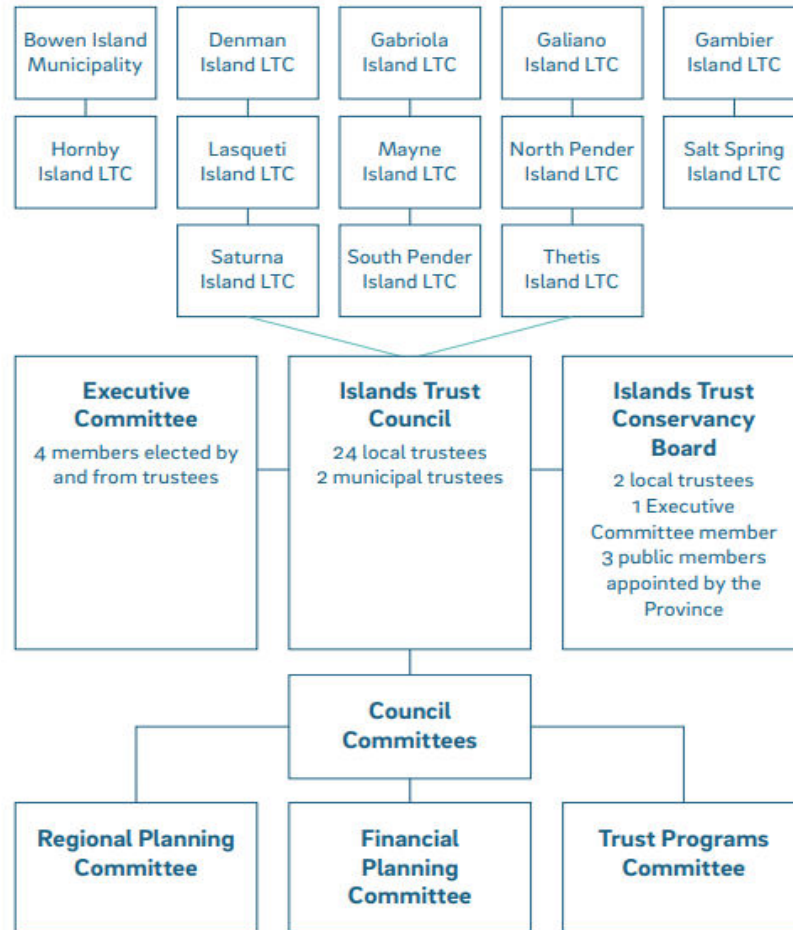
3.1 Islands Trust

The Islands Trust Area covers 5,200 square kilometres and includes 13 major islands and over 450 smaller islands. The region is home to 26,000 residents, 10,000 non-resident property owners and is the homeland of over 28,000 Coast Salish Peoples. Islands Trust Council is committed to reconciliation and acknowledges that the Trust Area is located within the treaty lands and territories of the BOKÉĆEN, K'ómoks, Lək'wəjən, Lyackson, MÁLEXEŁ, Qualicum, Quw'utsun Tribes, scəwáθən məsteyəx^w, Scia'new, səłilwətaʔt, SEMYOME, shísháłh, Skwxwú7mesh, Snaw-naw-as, Snuneymuxw, Spune'luxutth, SʔÁUTW, Stz'uminus, łaʔəmen, toq qaymıx^w, Ts'uubaa-asatx, Wei Wai Kum, We Wai Kai, WJOLÉLP, WSIKEM, Xeláltxw, Xwémalhkwu/ʔop qaymıx^w, and x^wməθk^wəy'em First Nations. These Nations had and still have village sites, cultural areas, and spiritual areas in the lands and waters comprising the Trust Area.

The mandate of Islands Trust is “to preserve and protect the Trust Area and its unique amenities and environment for the benefit of the residents of the Trust Area and of British Columbia, in cooperation with municipalities, regional districts, improvement districts, other persons and organizations, and the government of British Columbia” (Islands Trust Act). The Trust Area features spectacular beauty, extensive archaeological and culturally important sites, and some of the worlds most endangered and biodiverse ecosystems.

Across the Trust Area, there are thirteen local trust areas and Bowen Island Municipality. Every four years, island residents elect two trustees to represent them on their local trust committee / Bowen Island Municipal Council and the regional Islands Trust Council. Local trust committees and Bowen Island Municipality make decisions about local land use planning and regulation. As a regional body, Trust Council acts on matters that affect the entire Islands Trust Area, including setting the annual budget; creating and monitoring a Trust-wide Strategic Plan; implementing and amending the Islands Trust Policy Statement; advocating on issues important to the entire region; and engaging with First Nations and other governments, agencies, and organizations to preserve and protect the Trust Area for future generations. Official community plans and land use bylaws in the Trust Area have a strong emphasis on preserving and protecting the unique amenities and environment of the region.

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For more information on Islands Trust, please visit: <https://islandstrust.bc.ca/about-us/>

3.2 Salt Spring Island

Salt Spring Island is home to rich biodiversity and a variety of ecosystems. In and around the area, there are 48 species at risk. The area is critical habitat for Dun Skipper butterflies, Gray’s Desert-parsley and two species at risk: the Little Brown Bat and Sharp-tailed snake.

With a population of nearly 12,000 people, and substantial volumes of seasonal residents and visitors, Salt Spring Island is the largest, most populated, and most visited of BC’s Gulf Islands. It has a rural character, with natural areas, agriculture, an artisan community, and an emphasis on health, wellness, and sustainability that appeals to residents and visitors alike. The island has three public elementary schools and a large high school that draws students from around the Gulf Islands. It has a hospital with a 24-hour emergency department, and an RCMP station staffed with on-Island officers. The median age of Salt Spring Island residents is 56.4 years, more than a decade older than the provincial average of 42.8.

The Capital Regional District provides a range of services on the island, as do a handful of improvement districts. The largest of these improvement districts, the North Salt Spring Waterworks District, who provides potable water to more than 2,100 residential and commercial lots from two surface water sources.

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The Salt Spring Island Local Trust Committee (LTC) develops and adopts community plans and land use bylaws for the Salt Spring Island Local Trust Area (LTA). The LTA covers lands and waters beyond the island, and includes more than 25 associated islands including Bright Island, Deadman Islands, and Piers Island.

A complete list of associated islands can be found on [this webpage](#).

3.3 Project Background

Like almost all communities in British Columbia, Salt Spring Island continues to struggle with a housing crisis. The high cost and limited availability of real estate and the traditional form that modern residential development has taken on the island means that there are few housing options for working families entering the market, small units for independent seniors, or homes to rent. Addressing this issue on Salt Spring Island brings additional challenges, as solutions must be considered in the context of the Islands Trust Object - often referred to as the Islands Trust Mandate - to preserve and protect the natural environment and the area's unique amenities.

Islands Trust Council has funded the OCP-LUB Project to address these issues. The LTC has subsequently established a number of tools to guide the project:

- A [Project Terms of Reference](#), which outlines the project goal, objectives, processes, timelines, tasks, roles, and context that shall be considered throughout the project's execution.
- An OCP-LUB Advisory Planning Committee [Terms of Reference](#) that has been endorsed that sets out purpose, membership criteria, and other expectations. Member recruitment will be initiated in the near-term. As an APC, this group will be charged with providing unified advice to LTC for its consideration.
- The Salt Spring Island Project Team includes Islands Trust staff committed to supporting the completion of this project. This team includes the project manager – an Island Planner (senior planner); the area's Regional Planning Manager, and the Islands Trust's Communications Specialist. This team is supported by a range of internal staff.

3.4 Objectives

The goal of this project is to **increase housing options and housing equity** on the island in ways that integrate:

- The interests of First Nations with treaty and territorial interests in the Salt Spring Island Local Trust Area;
- Ecosystem integrity and connectivity; and
- Climate change resiliency.

Land use policies that emerge from this project will be directed towards advancing these objectives. Several recent reports from Islands Trust and other local agencies and organizations help to inform the context of the OCP-LUB update. A backgrounder summarizing these documents is included as APPENDIX B.

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3.5 Scope of Services

Technical tasks for the consultant will include:

1. Develop and manage a detailed project work plan
2. Review, assess, and implement housing-related policy directions proposed in recent reports, policies, and plans
3. Conduct a Plan Audit and Policy Gap Analysis
4. Plan, promote and ensure execution of all community engagement activities and analyze and present engagement results
5. Develop targeted updates to the OCP's community vision and relevant objectives as they relate to residential land uses
6. Develop new policy options and drafting of next policy directions for residential land uses
7. Develop corresponding LUB amendments to implement the updated OCP policies
8. Prepare a closing report containing insights of additional policy/regulatory measures which were highlighted through analysis/engagement but found to be out of the scope of this current project.

The following is an outline of the expected works to be completed.

FISCAL 2024/25 (to March 31, 2025)

Phase One– Project Initiation

A. Identify Community and Interest-Holder Consultation Approach

1. Identify key community interest-holders and partners for early engagement.
2. Collaborate on the development of a community and interest-holder engagement plan that integrates feedback from First Nations.
3. Undertake initial outreach to introduce the project to partners and explain the engagement process.

B. Initial Planning and Coordination

1. Set up regular coordination meetings with staff to refine the work plan and discuss upcoming project deliverables.
2. Develop a detailed work plan, ensuring alignment with the project timeline and deliverables as outlined in the OCP-LUB Project Terms of Reference.

Phase One Deliverables

1. A detailed Work Plan, with key deliverables, and a timeline with clearly defined and trackable milestones
2. A comprehensive Community Engagement and Communications Plan.

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- The Engagement Plan will be developed in accordance with the International Association for Public Participation (IAP2) engagement framework, and designed to incorporate its Diversity, Equity, and Inclusion principle described in [Beyond Inclusion: Equity in Public Engagement](#).
- 3. Work Plan and Community Engagement and Communications Plan to be presented to for comment at OCP APC and SS LTC prior to their execution.

Phase Two – Targeted Community Visioning

A. Plan and Reports Review: Issues Identification

1. Conduct a technical review of the current OCP and supporting documents
2. Meet with staff, the OCP-LUB APC, and LTC to identify related issues that need to be addressed in the Technical Review
3. Report results of Technical Review and issues identified
4. Prepare community engagement and interest-holder consultation materials to confirm findings with the public
5. Interim Deliverables:
 - a) Report summarizing results of review of relevant plans and policies
 - b) Summary of Key Issues identified
 - c) Presentation of findings from Technical Review and Key Issues to OCP Advisory Committee
 - d) Prepare “Backgrounder” information packages on each of the Key Issues and topics identified, with options, in preparation for engagement activities

B. Community and Interest-Holder Consultation

1. Facilitate community visioning workshops aimed at gathering input on housing, residential land use, and the community’s vision for growth.
2. Encourage the participation of key partners, including community groups, local residents, and First Nations, in these discussions.
3. Present the findings of the Technical Review and Policy Gap Analysis to frame the conversation around housing equity, climate resilience, and reconciliation.

C. Policy Gap Analysis and Initial Drafting

1. Prepare an early draft of revised Vision, General Goals, and Residential Land Use Objectives, based on feedback from the community consultations and the Policy Gap Analysis.
2. Identify areas where the current LUB could be brought into greater alignment with the OCP housing policy, including immediate, short term, and long term recommendations.

Phase Two Deliverables

1. First draft of the following revised OCP elements:
 - a. Revised Vision
 - b. Revised General Goals and Objectives
 - c. Revised Residential Land Use Objectives

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2. Present revised Vision, Goals and Objectives to OCP-LUB APRC and LTC
3. Summary reports of public engagement results and of works completed in Phase 2
4. Completion of a Policy Gap analysis to inform required updates to the OCP while outlining opportunities for immediate/short term LUB alignment.

Phase Three – OCP Development

A. Community and Interest Holder Consultation

1. Lead public engagement to present, discuss, and confirm results of engagement activities undertaken in Phase 2
2. Review draft revised Vision, Goals and Objectives:
 - a. Work in collaboration with staff to present proposed amendments to the public
3. Present to and engage the community on directions for growth management.

Interim Deliverables

1. Summary of results from public engagement on growth management
2. Community Growth Management Plan.

B. OCP Policy and Action Development

1. Review Land Use Designations and prepare revisions to policies, descriptions and designation of lands
2. Draft Policies, Strategies and Actions using knowledge gained from previous tasks
3. Draft new Interface Resilience development permit area
4. Review existing Development Permit Areas and their guidelines against revised vision, goals and objectives, and in consideration of project goals
 - a. Draft amendments to existing DPAs or draft new ones
5. Recommend amendments to OCP Maps based on new information gained through technical review, community consultation, and development trends
6. Develop indicators with staff that reflect the plan’s objectives, and recommend a realistic monitoring over the next 10 years

Phase Three Deliverables

1. Submit refined draft OCP that includes:
 - a. Draft Vision, and General Goals and Objectives
 - b. Draft Residential Land Use Goals and Objectives
 - c. Draft Policies, Strategies, and Actions
 - d. Draft Land Use Designations
 - e. Draft Interface Resilience (wildfire hazard) development permit area
 - f. Draft additional development permit area amendments of new development permit areas
 - g. Draft Indicators as developed through consultation with staff
2. Present draft bylaw amendments to OCP Advisory Committee
3. Conduct community engagement to gather input on the draft

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Phase Four – Draft OCP Review & LUB Initiation

A. Community and Interest Holder Consultation

1. Present the final draft of OCP amendments to the community, stakeholders, and First Nations for feedback.
2. Host public sessions to review and confirm findings from Phase 2 and Phase 3 consultations, focusing on how OCP amendments reflect community goals for housing, land use, and growth.
3. Begin community consultation on LUB considerations, gathering feedback on key regulatory themes like zoning, density, and land use designations that will inform LUB drafting.

B. LUB Drafting and Revisions to OCP

1. Initiate detailed drafting of LUB regulations, focusing on aligning zoning, residential density, and development permit areas with the updated OCP policies.
2. Refine OCP amendments based on feedback from community and stakeholder consultations, ensuring they align with the principles that will guide LUB development.
3. Finally align Growth Management Strategies, Land Use Designations, and Development Permit Areas in both the OCP and LUB drafting process.

C. Final Presentation and Adoption Process

1. Prepare OCP for final presentation to key stakeholders:
 - a. Presentation of Final Draft OCP and maps to the OCP Advisory Committee for final review and endorsement.
 - b. Final Presentation to Staff for administrative review and final adjustments.
 - c. Final Presentation to SS LTC for approval and adoption, ensuring all legal and procedural requirements are met.

Phase Four Deliverables

1. Final draft OCP amendments, including updated Vision, General Goals, and Residential Land Use Objectives.
2. Initial draft LUB regulations, including zoning and land use regulations, designed to align with the OCP policies.
3. Presentation of final draft OCP to the OCP Advisory Committee for endorsement and submission to SS LTC.
4. Initial LUB draft ready for further community engagement and feedback in Phase 5.

Phase Five – OCP Adoption & Draft LUB Review

A. Community and Interest-Holder Consultation

1. Gather input on the draft LUB regulations from community groups, stakeholders, and First Nations.

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2. Align the draft LUB amendment , as necessary to reflect any changes following the OCP public hearing and gather input on the revised draft LUB.

B. Final Revisions to OCP and LUB Drafting

1. Finalize the OCP for submission and adoption by SS LTC, incorporating any final revisions based on feedback.
2. Refine the LUB regulations based on community consultations and stakeholder input, ensuring that all regulatory frameworks align with the adopted OCP.
3. Prepare final LUB maps, development permit areas, and zoning regulations.
4. Provide engagement summaries.

Phase Five Deliverables

1. Final OCP submitted for adoption by SS LTC and referral to Executive Committee and Ministry for final approval.
2. Draft LUB regulations refined and ready for LUB adoption.
3. Final OCP and LUB maps submitted for review and approval.

Phase Six – LUB Adoption

A. Community and Interest-Holder Consultation

1. Assist staff with public hearings on the final LUB regulations, ensuring that all community feedback is gathered and incorporated into the final draft.
2. Continue stakeholder engagement to ensure that the final LUB is fully aligned with the adopted OCP and meets community needs.

B. Final Revisions and Submission for LUB Adoption

1. Finalize LUB regulations and submit them for SS LTC approval and formal adoption.
2. Ensure all legal and procedural requirements are met for LUB adoption, including final revisions based on public feedback and First Nations consultations.

Phase Six Deliverables

1. Final LUB Amendment for adoption.
2. Final public hearing summary and community engagement report.
3. Lessons Learned Report, including recommendations for future planning and alignment between OCP and LUB processes outlining policy actions that, while good practice, were not incorporated into any part of the plan due to some locally-occurring factor (i.e. cost, public sentiment).

Final Project Deliverables

At the completion of the OCP-LUB Update, SS LTC expects to receive the following deliverables:

1. Recommended amendments to the final draft Bylaws
2. A lessons learned/closing report at the end of the project, identifying future policy/regulatory amendments contemplated but not addressed within the scope of this project

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3. Polished drafts of the OCP and LUB bylaws, that are:
 - i. written in plain language
 - ii. legislatively correct
 - iii. aesthetically pleasing
4. A detailed Community Engagement Summary report
5. An Action Plan for the OCP and LUB, including recommended amendments that lists priorities for action along with the timeframe for implementation (immediate/short/medium/long term), and monitoring and evaluation metrics
6. Delivery of all documents and materials collected throughout the project, to be retained as part of the public record
7. Attendance as needed on-line or in-person at engagement opportunities, agency meetings, and LTC meetings

Islands Trust is committed to reconciliation and is working to implement the Truth and Reconciliation Commission's (TRC) Calls to Action. Contractors should be aware that approaches and materials that they provide must adhere to the TRC Calls to Action, specifically Call to Action #47 which states: *"We call upon federal, provincial, territorial, and municipal governments to repudiate concepts used to justify European sovereignty over Indigenous peoples and lands, such as the Doctrine of Discovery and terra nullius, and to reform those laws, government policies, and litigation strategies that continue to rely on such concepts"*. Contractors must work closely with Islands Trust staff to ensure that processes and materials align with the [TRC Calls to Action](#) and the [Islands Trust Reconciliation Declaration](#), follow guidelines for cultural safety, and acknowledge and recognize the treaty and territorial areas of First Nations and Indigenous communities in which they are working.

Note: Any deliverables not identified in this RFP that the Consultants will also provide to the Islands Trust should be listed in their Consultants application. Progress reports with due dates to be determined at inaugural meetings.

4 CONTRACT

4.1 Contract Terms and Conditions

Proponents should review carefully the terms and conditions set out in Appendix A, including the Schedules.

The term of the contract is expected to be from February, 2025 to March 31, 2026. At the sole discretion of Islands Trust, this term may be extended for a period of an additional six months, subject to funding availability and satisfactory Contractor performance.

4.2 Service Requirements

The Contractor's responsibilities will include the following:

1. Develop a project management schedule, including timelines and updates in a plain language, understandable format
2. Support the strengthening of relationships with area First Nations through their early and ongoing engagement in a project process that reflects shared values

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3. Ensure broad opportunities for community input through a robust public engagement process that reflects the diversity of the community
4. Ensure the Salt Spring Island policy products are consistent with the Islands Trust Policy Statement
5. Build on the strengths of the existing OCP by retaining those elements that continue to reflect the Island's aspirations
6. Where appropriate, analyze and incorporate the evidence and recommendations of other governments, agencies, and non-governmental organizations and consider enacting policy and regulatory changes accordingly
7. Report to Islands Trust staff on outcomes and summary of public outreach efforts and recommendation as identified in the Scope of Services
8. Provide for and execute an equity-based community engagement and communications plan informed by [Beyond Inclusion: Equity in Public Engagement](#)
9. Prepare recommendations to develop targeted OCP and LUB amendments that balance planning and technical expertise with local values and community knowledge
10. Prepare recommendations to develop OCP and LUB amendments that are clear and provide consistent guidance and direction for LTC, staff, and the community at large
11. Articulate an updated community vision, and residential land use goals and objectives that capture the unique context of Salt Spring Island
12. Assess residential land use needs based on current data and projections; including linkages to the Complete Communities Assessment, housing needs assessment, Housing Action Planning Taskforce Recommendations, community climate action and GHG profile, growth projections, and available lands
13. Review and update policies to define and manage the Ganges Village Area boundary and Fulford Village Area boundary and any future expansion
14. Consider options to implement amendments to the regulatory framework of the LUB in line with new OCP policy.
15. Develop a Interface Resilience development permit area in consultation with Salt Spring Island Fire Rescue and other relevant agencies, guided by the findings of the Salt Spring Island Community Interface Resilience Plan
16. Develop additional development permit areas, or amend existing, to address project goals

4.3 Related Documents

Appendix A – Islands Trust Contract Template

Appendix B – Core Studies & Reports

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5 REQUIREMENTS

In order for a proposal to be considered, a Proponent must clearly demonstrate that they meet the mandatory requirements set out in Section 7.1 (Mandatory Criteria) of the RFP.

This section includes “Response Guidelines” which are intended to assist Proponents in the development of their proposals in respect of the weighted criteria set out in Section 7.2 of the RFP. The Response Guidelines are not intended to be comprehensive. Proponents should use their own judgement in determining what information to provide to demonstrate that the Proponent meets or exceeds the Province’s expectations.

Please address each of the following items in your proposal in the order presented. Proponents may find it helpful to use the individual Response Guidelines as headings for proposal responses.

5.1 Capabilities

5.1.1 RELEVANT EXPERIENCE

To support targeted updates to the Salt Spring Island Official Community Plan (OCP) and Land Use Bylaw (LUB) the Salt Spring Island Local Trust Committee is seeking proposals from qualified consultants with recent (within the past 5 years) experience/skills in a Local Government Setting in:

1. project management
2. planning policy development, with focus on execution of OCP and land use bylaw development
 - a. Specific experience working with B.C. Housing policy/regulation is considered an asset.
2. equity-based community engagement
3. presentation and community faciliation

Proponent must include a summary of the background and area of expertise each consultant project team member, including any subcontractors or sub consultants to be used.

Proponents shall provide a resume of the consultant project lead and list all other consultant project team members that would be directly involved in the project, indicating experience, qualifications, credentials, home office and notable achievement in each area of the work. Proponents shall provide a project organization chart and a table clearly indicating what role the responsibility each team member shall play, the anticipated hours and, and the total role and product hours. The district must be kept apprised of and approved any changes or substitution of key personnel for this project.

Organizational experience:

The proponent and any subcontractors of the proponent included in its proposal should have a minimum of three or more years’ experience within the past five years in delivering services of a similar scope and complexity. Similar scope and complexity are defined as:

- Policy Gap analysis between Official Community Plans and Land Use/Zoning Bylaws

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- Official Community Bylaw drafting
- Land Use Bylaw drafting

Key Personnel:

- Provide curriculum vitae of key project team members, reasons why they were selected for this project, and how they will add value to the project
- Identify any staff with degrees and certifications

Examples:

- Provide two to four examples of programs the proponent has completed within the past five years (as of the closing date of the RFP) that have been on a similar scale, including an overview of the controls that were embedded into the processes

5.1.2 REFERENCES

Proponents should provide a minimum of three references (i.e. names and contact information) of individuals who can verify the quality of work provided specific to the relevant experience of the Proponent and of any subcontractors named in the proposal. References from the Proponent's own organization or from named subcontractors are not acceptable.

The Province may in its sole discretion, but is under no obligation to, check Proponent and subcontractor references without first notifying the Proponent or its subcontractors. The Province reserves the right to seek additional references independent of those supplied by the Proponent, including internal references in relation to the Proponent's and any subcontractor's performance under any past or current contracts with the Province or other verifications as are deemed necessary by it to verify the information contained in the proposal and to confirm the suitability of the Proponent.

Further to the Province's reservation of rights under Section 2.22, if the Proponent is deemed unsuitable by the Province in its sole discretion due to unsatisfactory references, or if the proposal is found to contain material errors, omissions or misrepresentations, the Proponent's proposal may be rejected.

Response Guidelines for Capabilities

1. Name a contact person for the Proponent, and include this person's address, phone and fax numbers, and email address. This information will not be evaluated, but will be used to contact the Proponent as required.
2. Provide evidence to support the requirements identified in section 5.1.1 above.
3. Provide a minimum of three references specific to the experience cited, each of which includes a contact name, phone number and email address.
4. Provide resumes of each of the key resources being proposed. The resumes should clearly indicate how the key resources meet the requirements identified in this RFP.

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5.2 Approach

5.2.1 PROJECT MANAGEMENT AND TIMELINES

The Proponent is permitted to revise the order or timing of phases and tasks in the Scope of Services found in Section **Error! Reference source not found.**, if it is understood that all elements must be addressed. Proposals must detail information that addresses:

- Work planning
 - Proponent shall indicate when work would commence in approximately how long it would take to complete the assignment. Propose start dates, progress meeting dates, milestones, other key events, and major product deliverable shall be clearly identified on the product schedule. The schedule shall identify the critical path, delineate what resources will be required, and when they will be required. The proposed schedule must align with the RP deliverable target dates
- Detailed timelines
 - Proponents are to confirm their understanding of the scope of work and clearly defined and describe how their proposed approach would meet those requirements the work plan should include a scheduling of activities and resources necessary to meet the product objectives including provision for quality assurance and control plan that ensures senior technical review of relevant product activities
- Work breakdown structure
 - As a supplement, a schedule of rates for all key personnel, technical staff, and support personnel must be included along with a phase-by-phase description of the work done by each team member and the number of hours allocated to each team member.
- Quality control and change management
 - Articulate a commitment to quality control to ensure that all products are reviewed with adequate time prior to presentation to public, elected officials, or other external groups, and reflect this in the detailed timeline.
 - Provide a change management plan to ensure that any changes to a project's scope, schedule, budget, resources or interest holder groups under the purview of this contract are initiated, assessed, implemented and closed.
- Quality Assurance and Control
 - Strategic decisions will be based on the collected data and analysis results provided by the consultant. Proponent shall provide a description of an internal quality assurance control program designed to minimize potential sources of error that could affect analysis and negatively impact decision making processes on which recommendations to the Local Trust Committee made.

5.2.2 PUBLIC ENGAGEMENT AND COMMUNICATION

The Proponent must provide a proposed methodology for public engagement and communication centering on the development of a communications and engagement plan that reflects the [Spring Island OCP-LUB Update Project's Community Engagement and Communications Strategy](#).

5.2.3 POLICY DEVELOPMENT

Proposals should include an approach and methodology for executing:

1. Policy Gap analysis
2. Official Community Bylaw drafting

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3. Land Use Bylaw drafting

Response Guidelines for Approach

Explain the proposed methodology in 5.2.1 5.2.2. and 5.2.3. including timelines, risks, issues, and assumptions.

5.3 Price

Prices quoted will be deemed to be:

- a) in Canadian dollars;
- b) inclusive of duty, FOB destination, and delivery charges where applicable; and
- c) exclusive of any applicable taxes.

Response Guidelines for Price

1. Provide a firm, fixed, all-inclusive price for all services proposed. Islands Trust will not pay for any costs or expenses not included in the price, unless otherwise expressly provided. Provide cost details in alignment with the stages found in 3.5 Scope of Service.

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6 PROPOSAL FORMAT

Proponents should ensure that they fully respond to all requirements in the RFP in order to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- a) Signed cover page (see section 7.1 Mandatory Criteria).
- b) Table of contents including page numbers.
- c) A short (two – three page) summary of the key features of the proposal and project team and how they work with clients.
- d) The body of the proposal, including pricing, i.e. the “Proponent Response”.
- e) Appendices, appropriately tabbed and referenced.
- f) Identification of Proponent (legal name)
- g) Identification of Proponent contact (if different from the authorized representative) and contact information.

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7 EVALUATION

Evaluation of proposals will be by a committee formed by Islands Trust and may include employees and contractors of the Province and other appropriate participants.

The Islands Trust’s intent is to enter into a Contract with the Proponent who has met all mandatory criteria and minimum scores (if any) and who has the highest overall ranking.

Proposals will be assessed in accordance with the entire requirement of the RFP, including mandatory and weighted criteria.

7.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria
The proposal must be received at the Closing Location before the Closing Time.
The proposal must be in English.
The proposal must be submitted using one of the submission methods set out on the cover page of the RFP and in accordance with Section 2.3.
The proposal must either (1) include a copy of the cover page that is signed by an authorized representative of the Proponent or (2) otherwise identify the RFP, identify the Proponent and include the signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound, or (3) be submitted by using the e-bidding key on BC Bid (if applicable) in accordance with the requirements set out in Section 2.2.

7.2 Weighted Criteria

Proposals meeting all of the mandatory criteria will be further assessed against the following weighted criteria.

Weighted Criteria	Weight	Minimum score
Capabilities and Experience (Section 5.1)	60	40
Approach (section 5.2)	25	16
Price (section 5. 3)	15	0
TOTAL	100	56

Proponents that do not meet a minimum score within a weighted criterion will not be evaluated further.

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7.3 Price Evaluation

Price will be evaluated using the following formula:

(Lowest price/your price)*points available

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Use Bylaw Amendment Project**

Appendix A – Islands Trust Contract Template

See separate document.

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Appendix B – Core Studies and Reports

See separate document.