



Islands Trust

Request for Proposals
Housing Action Plan
RFP #: RFP-2023.001

Issue Date: April 12, 2022

Closing Time: Proposals must be received before **2 pm** Pacific Time on **May 17, 2022**

Request for Proposals No. RFP-2023.001 - Housing Action Program

THE ISLANDS TRUST CONTACT PERSON: All enquiries from proponents that are related to this Request for Proposals (RFP), including any requests for information and clarification, are to be directed, **in writing**, to the following person who will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the option of Island Trust. Enquiries will be received from proponents until **2 pm on May 17, 2022**.

Louisa Garbo
Islands Trust Local Planning Services
Island Planner
Email: lgarbo@islandstrust.bc.ca

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.

Request for Proposals No. RFP-2023.001 - Housing Action Program

PROPONENT NAME (please print): _____

NAME OF AUTHORIZED REPRESENTATIVE (please print): _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

DATE (please print): _____

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1 SUMMARY OF THE REQUEST

The Salt Spring Island Local Trust Committee (SSI LTC) is seeking consulting services to deliver a public engagement program for the Housing Action Program. See the [project link](#) for all relevant information, including staff reports, project charter, and a public engagement framework. The main objective of the Housing Action Program (HAP) is to explore options that support the creation of diverse housing options without causing harm to the ecosystem or depleting the finite natural resources on Salt Spring Island. The SS LTC has appointed a Housing Action Program Task Force (an advisory planning commission) to provide guidance and feedback to the SS LTC on the HAP. An amendment to the Salt Spring Island Official Community Plan (OCP) will likely be required to implement the HAP's objectives, and the recommendations from the Task Force.

Islands Trust is a federation of special-purpose governments entrusted with a provincial mandate to preserve and protect over 450 islands and surrounding waters in the Salish Sea.

Islands Trust is now soliciting submissions from qualified firms to lead the Housing Action Program Public Engagement Activities, working closely together with Islands Trust staff. This work must be completed by August 30, 2022, consistent with the Scope of Services identified in this RFP. The expected range for this project is \$30,000 to \$35,000 CAN.

| Milestones | Schedule |
|--|----------------------------------|
| RFP closing date | May 17, 2022 at 2:00 p.m. |
| Award Contract | June 1, 2022 |
| Kick off meetings(s) | June 6, 2022 |
| Project development and implementation | June 10, 2022 to August 30, 2022 |
| Final deliverables due | August 30, 2022 |
| Contract ends | September 6, 2022 |

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

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 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 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 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 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 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](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.

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.

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- 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.

3 OVERVIEW

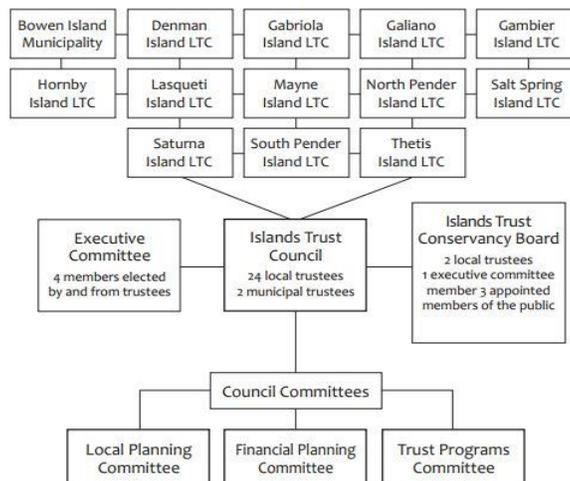
3.1 Islands Trust

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 BOKÉCEN, K’ómoks, Lək’wəḡən, Lyackson, MÁLEXEŁ, Qualicum, Quw’utsun Tribes, scəwáθən məsteyəxʷ, Scia’new, səlilwətaʔt, SEMYOME, shíshálh, Sḵwəxwú7mesh, Snaw-naw-as, Snuneymuxw, Spune’luxutth, SḶÁUTW, Stz’uminus, ʔaʔəmen, toq qaymuxʷ, Ts’uubaa-asatx, Wei Wai Kum, We Wai Kai, WJOLEŁP, WSIKEM, Xeláltxw, Xwémalhkwu/ʔop qaymuxʷ, and xʷməθkʷəyəm 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.

Islands Trust Legislative Structure
Local Trust Committees and Island Municipalities



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

3.2 Background

The Salt Spring Island Local Trust Committee (SSI LTC) is seeking consulting services to deliver a public engagement program for the Housing Action Program. See the [project link](#) for all relevant information, including staff reports, project charter, and a public engagement framework. The main objective of the Housing Action Program (HAP) is to explore options that support the creation of diverse housing options without causing harm to the ecosystem or depleting the finite natural resources on Salt Spring Island. The SS LTC has appointed a Housing Action Program Task Force (an advisory planning commission) to provide guidance and feedback to the SS LTC on the HAP. An amendment to the Salt Spring Island Official Community Plan (OCP) will likely be required to implement the HAP's objectives, and the recommendations from the Task Force. The interested Consulting Team should keep this in mind in designing the activities as the outcome and feedback intend to assist in amending the SSI OCP on relevant housing policies.

Efforts as of to date

Actions that are taken as of to date by staff since the adoption of the Housing Action Plan Project Charter:

- Early conversations with First Nations staff, the North Salt Spring Waterworks District, Capital Regional District (CRD), School District (SD64), Agricultural Land Commission (ALC), Salt Spring Fire Rescue (SSIFR), Salt Spring Island Arts Council, the Chamber of Commerce, the Ministry of Transportation and Infrastructure, harbour agencies, health service agencies, and various non-profit and community groups.
- A project page on the Islands Trust website serves as a clearinghouse of information.
- Recurring meetings with the Technical Working Group consisting of staff members from various agencies.
- Developed the Housing Action Program [Public Engagement Plan](#) in accordance with the [Public Engagement Framework](#).

Issues to consider

The Housing Action Program Task Force proposed a recent initiative to amend the Salt Spring Island Land Use Bylaw to allow secondary suites in all zones. This initiative was endorsed by the Salt Spring Island Local Trust Committee (SS LTC), and the SS LTC further expanded the recommendation to permit detached accessory dwelling units. This initiative has become divisive in the community, with housing advocates endorsing more housing while preservation-minded environmentalists argue for limits to growth. The main purpose of seeking a professional consulting team is to provide a neutral third party to solicit and facilitate community input while bridging the gap between the opposing views.

While impossible to fully resolve every potential objection to a housing solution or action, a good-faith effort to initiate a dialogue about community concerns is a critical step in this planning effort. The objectives in seeking consulting services are:

- Better identify public values, ideas, and recommendations on the housing issues;
- Better inform residents on the issues relating to the housing crisis;
- Increase the rates of community participation;
- Generate more community buy-in and support to the solutions while reducing the level of contentiousness;
- Increase opportunities for more meaningful civil discussions; and,
- Assist Local Trust Committee on the decision-making process.

3.3 Scope of Services

The **Scope of Services for the contract includes**, but is not limited to, the followings:

- designing public engagement activities;
- providing necessary technologies for interactive engagement process;
- designing brochures, materials, advertisements necessary to promote the engagement activities;
- materials and advertisements will be adaptable for use on Islands Trust website, social media (example: SS Exchange, Facebook, Instagram) and print media;
- submitting required progress reports and final deliverables;
- facilitating engagement activities;
- summarizing the public engagement activities;
- recommending key considerations to the Housing Action Program; and,
- reporting to staff, and the appointed and elected bodies.

The specific tasks identified below intend to provide directions on how to achieve the goals of the public engagement plan; the Local Planning Service (LPS) is open to recommendations from the selected Consulting Team to ensure an effective, efficient and meaningful process to engage with the diverse groups of islanders in the Salt Spring community.

| Selected Consulting Team | LPS Office |
|--|---|
| <ul style="list-style-type: none"> • Participate in an inaugural meeting with LPS Office to discuss Scope of Services • Establish recurring meetings schedule, communication methods with LPS Office | <ul style="list-style-type: none"> • Prepare for the inaugural meeting with the Consulting Team to fine-tune the Scope of Services • Identify appropriate recurring meetings and communication methods with the Consulting Team |
| <ul style="list-style-type: none"> • Review documents related to the Housing Action Program • Review OCP, Islands Trust Strategic Plan and relevant documents to appreciate the mandates of the Trust Council • Review interrelated projects in order to better prepare for the designing of the Public Engagement program activities | <ul style="list-style-type: none"> • Supply relevant documents and information • Explain the amendment to the OCP policies relevant to the housing crisis • Explain how other relevant projects relate to the Ganges Village planning, the water sustainability, the Coastal Douglas Fir Projects and other LTC housing related projects |
| <ul style="list-style-type: none"> • Prepare a draft public engagement activities plan. Discuss with staff and seek input on the engagement activities with HAPTF. | <ul style="list-style-type: none"> • Review draft engagement activities plan. • Administer HAPTF meeting (currently meet 1st Thursday of the month) |
| <ul style="list-style-type: none"> • Finalize the public engagement activities consistent with the Housing Action Program Public Engagement Plan • Proposal should include flexibility to respond to needs and changes in the process | <ul style="list-style-type: none"> • Provide stakeholders, agencies, and community groups contact information • Review and provide input on the proposed activities by the Consulting Team • Assist in the presentation of the final program to LTC for endorsement |
| <ul style="list-style-type: none"> • Facilitate (including set-up) on-site and web-based public engagement activities identified in the Consulting Team’s activities plan • When necessary, assist LPS office in other engagement events and activities | <ul style="list-style-type: none"> • Attend public engagement activities hosted and facilitated by the Consulting Team • Conduct public engagement events and activities that are not hosted or facilitated by the Consulting Team |

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| | |
|---|--|
| <ul style="list-style-type: none"> Produce a variety of reporting and data collection mechanisms obtained from the public engagement process, including visual reports and participants geographic information. | <ul style="list-style-type: none"> Review proposed information and offer revision comments |
| <ul style="list-style-type: none"> Public outreach to community groups and general public through face-to-face forums of both small groups and large groups as well as online, including social media Brainstorming and feedback sessions with Task Force/Advisory Planning Commission, and SSI LTC | <ul style="list-style-type: none"> Attend events and activities hosted and facilitated by the Consulting Team Attend brainstorming and feedback sessions |
| <ul style="list-style-type: none"> Respond to enquiries related to the public engagement process | <ul style="list-style-type: none"> Respond to enquires on technical and policy questions related to the Housing Action Program |
| <ul style="list-style-type: none"> Manage online engagement process | <ul style="list-style-type: none"> Approve web-based tools provided by the Consulting Team |
| <ul style="list-style-type: none"> Provide materials and strategic communications for the public engagement process | <ul style="list-style-type: none"> Review all materials produced prior to being published |
| <ul style="list-style-type: none"> Prepare all necessary background documents as part of the public engagement process | <ul style="list-style-type: none"> Provide necessary information and material, and review all documents and material generated by the Consulting Team |
| <ul style="list-style-type: none"> Provide summary report on each public engagement activity/event including feedbacks and input collected from the participants Provide recommendations on solutions explored by the participants | <ul style="list-style-type: none"> Review summary reports and provide comments |
| <ul style="list-style-type: none"> Revise reports based on LPS comments Present to appointed and elected officials Recurring meetings with LPS | <ul style="list-style-type: none"> Present reports or status of public engagement process to appointed and elected officials Recurring meetings with the Consulting Team |

Progress Reports and Deliverables

- a. A public engagement activities plan consistent with the Housing Action Program Public Engagement Plan and the objectives outlined in the Public Engagement Framework.
- b. Progress reports with due dates to be determined at the inaugural meeting (completion of all deliverables should be by August 30, 2022).
- c. Online public engagement, and other web-based tools as identified in the Public Engagement Program.
- d. Brochures, Ads, and/or posters of project and project-related activities and events.
- e. Reports on analysis and recommendations as identified in the Scope of Services.

4 CONTRACT

4.1 Contract Terms and Conditions

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

The Term of this contract will be from signing (June 2022) to September 6, 2022. The Term may be extended for one additional period of six (6) months, at the sole discretion of the Islands Trust.

4.2 Service Requirements

The **Contractor's responsibilities** will include the following:

- a. The development of engagement tools and activities to implement the Housing Action Program Public Engagement Plan;
- b. Collaborate with the Housing Action Program Task Force on engagement activities;
- c. Presentation of the final public engagement activities to SSI LTC;
- d. Meet with staff, the task force, and elected officials to review the draft plan, to discuss progress, and to present results;
- e. Prepare and facilitate all public engagement activities and events as identified in the activities plan proposed by the selected Consulting Team;
- f. Conduct the public engagement activities based on methodology, tools, software, or any interactive mediums available for the engagement process;
- g. Report to Islands Trust staff on outcomes and summary of public outreach efforts as identified in the Scope of Services;
- h. Provide technical support, design of the material, and various tools to support the engagement activities; and,
- i. Presentation of the progress and final outcome to the Salt Spring Island Local Trust Committee.

4.3 Related Documents

Appendix A – Islands Trust Contract Template

Key Reference Documents - the following is not an exhaustive list of material:

[Islands Trust Strategic Plan 2018-2022](#)

[Islands Trust Policy Statement](#)

[Housing Action Program Project Charter](#)

[Housing Action Program Public Engagement Framework](#)

[Housing Action Program Public Engagement Plan](#)

[Salt Spring Island Local Trust Committee Official Community Plan Bylaw No. 434, 2008 Schedule "A" Volume 1: Land Use and Servicing Objectives](#)

[First Nations Engagement Principles](#)

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:**

The Proponent must demonstrate the capacity, expertise, and knowledge to develop a public engagement strategy for a growing coastal community such as Salt Spring Island. In addition, the Proponent must have the capability to lead the engagement activities that are designed for a diverse population including youth, business communities, low-income families, single parents, and other segments of populations that typically don’t have the resources to participate in the engagement process. Consulting Team that possesses an IAP2 certification is encouraged but not required. Experience working with First Nations and dealing with housing issues will be preferable. Strong land use, community planning, and housing policy development background is preferred. Strong public engagement experience, a team that is resourceful, innovative and collaborative is essential.

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.

5.2 Approach

5.2.1 PROJECT MANAGEMENT AND TIMELINES

The proponent should have a proposed work plan for a three-month public engagement. The workplan must include information that addresses:

- a) Work planning
- b) Managing milestones and deliverables
- c) Detailed timelines

5.2.2 PUBLIC ENGAGEMENT AND COMMUNICATION

The proponent should have a proposed methodology for public engagement and communication including:

- a) Public engagement facilitation
- b) Online survey capabilities
- c) Stakeholder (audience) and community groups jurisdictional scan
- d) Designing public engagement processes
- e) Develop communications plans and materials
- f) Collecting qualitative and quantitative data/feedback from participants
- g) Reporting

Response Guidelines for Approach

Explain the proposed methodology in 5.2.1 and 5.2.2. 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

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 3.3 Scope of Service.

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.

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 |
|---|---------------|
| 1. Understanding of the scope of the work, the deliverables of the public engagement activities, and the timeframes required. | 15 |
| 2. Experience that demonstrates project management and meaningful facilitation of community engagement as they relate to government bureaucracy, housing policies, community and land use planning. | 20 |
| 3. Demonstrated qualifications of members on the team. | 20 |
| 4. Relevant examples of recent work performing services of similar size and complexity and references. | 15 |
| 5. Proposed Work Plan that includes Timelines. | 20 |
| 6. Price (all-inclusive fixed price). | 10 |
| TOTAL | 100 |

7.3 Price Evaluation

Price will be evaluated using the following formula:

$$(\text{Lowest price}/\text{your price}) * \text{points available}$$

Appendix A – Islands Trust Contract Template

See separate document.