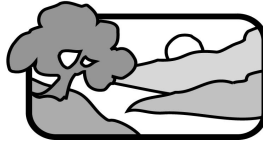


Request for Proposals No. RFP-2024.001

Complete Community Assessment



Islands Trust

Request for Proposals

Salt Spring Island Local Trust Area Complete Community Assessment

RFP #: RFP-2024.004

Issue Date: December 15, 2023

Closing Time: Proposals must be received before 2 pm Pacific Time on January 18, 2024

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 January 11, 2024**.

Chris Hutton

Regional Planning Manager

Email: chutton@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.

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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 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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1 SUMMARY OF THE REQUEST

The Salt Spring Island Local Trust Committee (SS LTC) is seeking consulting services of a qualified consultant or consulting team to provide comprehensive data collection, analysis, and geospatial studies of the local trust area (LTA) to help identify alternate development scenarios, policies, and implementation recommendations that foster long-term community sustainability and to manage and direct growth. The outcome of the assessment should provide policymakers with information to support decision-making that will optimize opportunities to support complete community development and to carry out the Object of the Islands Trust. To achieve the outcome, the analysis must focus on growth through the lenses of housing, daily needs, transportation, and infrastructure; see more detail on this concept in Section 3.2 below.

The results of this assessment will directly inform policy development for Salt Spring Island and provide residents, the public, professionals, and staff accurate information when considering housing and land use development options. Most importantly, the products must be rooted in evidence and support future evidence-based decision-making.

The SS LTC is seeking a qualified consulting team to lead a complete community assessment. The team must bring together expertise in:

- Geospatial data collection, synthesis, analysis, and mapping
- Equity-based engagement, facilitation and mediation of an array of interest holders, governance partners, First Nations partners, local organizations, and the public
- Relationship building and culturally inclusive engagement with First Nations partners
- Ability and qualification to read, interpret and engage on civil servicing plans, reports and strategies
- Land use planning, with expertise in housing, transportation, community development, growth management, policy development, environmental planning, hazard land analysis, climate risk and vulnerability analysis, urban design
- Strategic planning in complex multi-agency governance environments
- Economic analysis and demographic modelling

This assessment will include the following:

- Assemble and review existing related policies, plans, and data
- Analyse and engage with interest holders
- Identify gaps in data and/or evidence
- Provide policy recommendations
- Generate at least three viable, potential growth scenarios that enable the progression of a complete community while carrying out the Object of the Islands Trust.

The assessment outcome will inform the upcoming amendment to land use plans. The consultant will be working closely with and the Islands Trust staff, with input from the SS LTC.

As per the requirements of the grant, work must be completed by September 27, 2024, and correspond with the Scope of Services identified in this RFP. The **expected budget for this project is CAD \$120,000**. Further details related to the scope and requirements of this opportunity can be found within this RFP.

Milestones	Schedule
RFP closing date	January 18, 2024, at 2:00 p.m.
Award Contract	Late January, 2024
Kick off meetings(s)	Early February, 2024

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Final deliverables due	August 23, 2024
Contract ends	September 27, 2024

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;

“**Engagement plan**” means a plan that outlines how to engage interest holders in order to gather input, clarify information and foster understanding among those interested and affected by the scope of this project to better inform the decision-making process;

“**First Nations partners**” means acknowledged First Nations communities whose lands intersect with the SS LTA;

“**Governance partners**” means public bodies that play a role in regulating any aspect of service relevant to the scope of this RFP in the SS LTA

“**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;

“**Interest holders, all**” means First Nations partners, local organizations, governance partners, or individuals who are identified or who self-identify as having an interest or concern in the topics discussed in the objectives of this project.

“**Interest holders, public**” means any person or group affected by the scope of this project and its undertaking.

“**Local organization**” means a third sector organization whose purpose relates to this project or its undertaking.

“**Object**” refers to Object of the Islands Trust as articulated in section 3 of the *Islands Trust Act*.

“**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 His Majesty the King 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.

“**Third sector**” includes local organizations.

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

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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:
 - 1 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:
 - 2 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.

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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.

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- 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.

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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
- d) require security screenings for a Proponent who is 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
- 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

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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:

- 1 Trade, Investment and Labour Mobility Agreement;
- 2 New West Partnership Trade Agreement;
- 3 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.
- 4 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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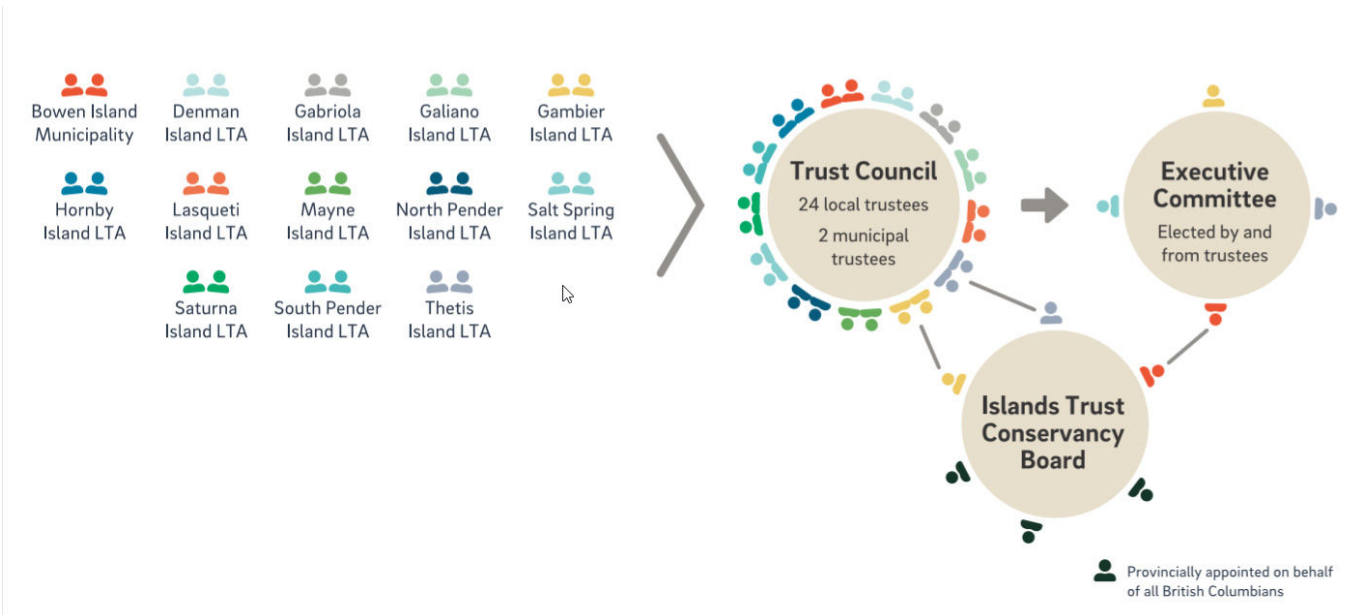
3 OVERVIEW

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 BOKÉCEN, K’ómoks, Lək ʷəŋən, Lyackson, MÁLEXEŁ, Qualicum, Quw’utsun Tribes, scəwáθən məsteyəxʷ, Scia’new, səliłwətaʔt, SEMYOME, híshálh, Sḵwḵwú7mesh, Snaw-naw-as, Snuneymuxw, Spune’luxutth, SḶÁUTW, Stz’uminus, ʔəʔəmen, toq qaymıxʷ, Ts’uubaa-asatx, Wei Wai Kum, We Wai Kai, WJOŁEŁP, WSIKEM, Xeláltxw, Xwémalhkwu/ʔop qaymıxʷ, and xʷməθkʷəy̓əm First Nations. These Nations had and still have village sites, cultural areas, and spiritual areas in the lands and waters comprising the Trust Area.

Every four years, Trust voters 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.

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.



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3.2 Salt Spring Island Local Trust Area

Salt Spring Island Local Trust Area (SS LTA) is the plan area for this project. The SS LTA is a rural community with a village hub and includes Salt Spring Island and more than 25 associated islands, such as Bright Island, Deadman Islands, and Piers Island. It also includes the surrounding waters up to the high-water marks encompassing Finlayson Arm, Cowichan Bay, and Sansum Narrows. The area has a population of about 11,795 people and covers a land area of 182.7 square kilometers. The SS LTA is home to a 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.

3.3 Background

The Object of the Islands Trust highlighted above provides a starting point for the undertaking of projects and decision frameworks at all levels of the Islands Trust. The SS LTC's responsibilities are for the purpose of carrying out the Object through section 24 of the *Islands Trust Act*:

- Sending its bylaws to the Executive Committee for approval prior to adoption
- Carrying out duties that the Islands Trust Council directs
- Enforcing bylaws adopted
- Regulating the development and use of land in its local trust area
- Entering into agreements with varying governance partners respecting the coordination of activities in the local trust area

Balancing the Object of the Trust and local needs and service expectations necessitates collaboration with other local governance entities and organizations that provide services, as well as a range of interest holders. With a narrower scope of responsibility, the SS LTA receives typical local government services from a patchwork of regional governance (Capital Regional District (CRD)), improvement districts, and provincial ministries. Like many small communities, local organizations in the third sector play a strong role in filling soft service gaps, including social support systems, safety advocacy, and environmental protection. A complete community assessment is best served by the incorporation of valid, vet-able third-party data and collaboration with its people.

3.3.1 HOUSING

The most recent housing needs assessment conducted by CRD indicated that the population of SS LTA grew by 10% between 2006 and 2016. Projections suggest that Salt Spring Island grew by approximately 499 residents between 2016 and 2020 and could grow by an additional 454 residents between 2020 and 2025. Several previous housing reports and studies have also identified an increasing need for more affordable housing and diverse housing options to address the growing housing crisis in SS LTA. Resolving constraints and fulfilling the demand for housing can serve as a strategic means to transition Salt Spring Island to a complete community.

The need for more housing in the appropriate price point and quantity to sustain a functioning local economy and liveability is well-established by a history of housing studies. What is less well understood is that these issues are exacerbated by nature of being an island. Without a comprehensive, synthesized assessment of the factors that inhibit meeting this need and collaborating with the actors who provide for those factors, SS LTC cannot coordinate on addressing the housing issue, except on an ad hoc basis.

3.3.2 LAND USE PLANNING IN THE SALT SPRING LTA

There has been no comprehensive update of the Official Community Plans (OCPs) or Land Use Bylaws (LUBs) in the SS LTA since 2008. An OCP-LUB project has been funded in response to policy, social, and

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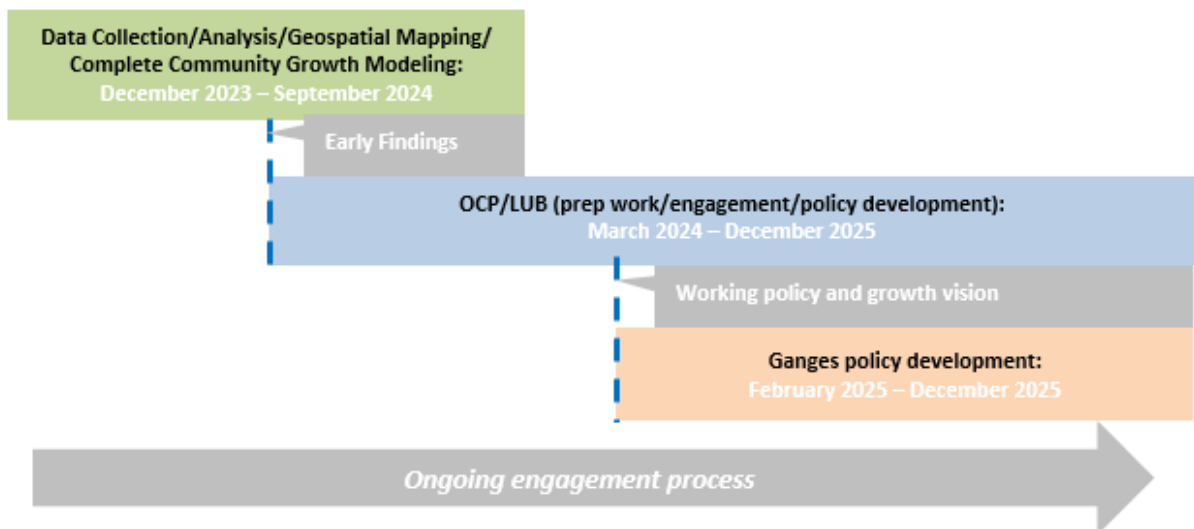
technological change and to address contemporary community challenges the current bylaws no longer serve. Community challenges include evolving directives on First Nations Reconciliation, lack of affordable housing and housing options, growth pressures, climate resiliency planning, infrastructure issues (such as the water moratorium), work force stability challenges, and transportation policy and outcomes. The OCP-LUB update is intended to provide a framework to guide the development of a complete community by diversifying housing options and advancing First Nations Reconciliation.

3.3.3 COMPLETE COMMUNITIES PROGRAM

As indicated in *Complete Communities - A guide to geospatial land use assessments for British Columbia's communities* (Guide), diversifying housing options, reducing infrastructure costs, reducing greenhouse gas (GHG) emissions, and increasing walkability are common goals for many local governments in British Columbia. The goal of the OCP-LUB Project aligns with these concepts. This complete community assessment will seek to meet the basic principles highlighted in the Guide in collaboration with interest holders.

The Complete Community Assessment for Salt Spring Island Local Trust Area is a dependency of the upcoming land use projects, as can be noted in the SS LTA Projects Road, which has been generally accepted by SS LTC.

PROJECTS ROADMAP



3.4 Objectives

The objectives of the Complete Community Assessment are to:

- 1 Conduct a comprehensive collection, synthesis, and analysis of local infrastructure, studies and other technical data to identify areas suitable for housing to support improvement to the SS LTA's evolution as a complete community. The assessment is intended to result in the creation of a local trust area complete community concept that will inform policy development and collaboration relating to housing, daily needs, transportation, and infrastructure. An assessment in the SS LTA that:
 - a. Diversifies housing options for the community workforce and various income and social groups through diversification, retrofit and accommodation of purpose-built affordable housing

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- b. Ensures equitable access to safe housing with suitable infrastructure and community services
 - c. Increases housing supply in appropriate locations as they relate to infrastructure servicing, transportation options, and walkability
 - d. Promotes climate change work on community infrastructure and governance systems by focusing on adaptation and resiliency, as well as reducing GHG emissions through design and construction standards relating to regulations and goals for buildings and infrastructure regulated support green transportation infrastructure and complete streets and third places.
 - e. Discourages or mitigates development in natural hazard, environmentally sensitive, conservation or reserve areas while incentivizing increased density in areas near existing infrastructure and amenities
 - f. Protects the natural environment and archaeological heritage
- 2 Undertake a Communications and Engagement Plan that reflects the principles and practices of the *Beyond Inclusion: Equity in Public Engagement* (link provided at end of document) whose implementation incorporates engagement into the Work Plan such that it:
- a. Outlines how important information will be communicated
 - b. Informs all interest holders about key concepts, processes, and project products
 - c. Gathers input from all interest holders in accordance with an interest holder analysis
 - d. Strengthens working relationships with First Nations, governance partners, and local organizations
 - e. Makes space and promotes cultural safety and expression and welcomes First Nations knowledge and perspectives

3.5 Scope of Services

The specific tasks identified below provide directions for achieving the objectives outlined in Section 3.3. above; the Islands Trust Project Team (ITPT) for Salt Spring Island is open to recommendations from the selected consultant to ensure delivery of a supportable, comprehensive deliverable. The Scope of Services for the contract includes tasks with associated activities described below:

Phase 1: Orientation and Confirmation

Task 1. Project Orientation

- Conduct kick off meetings with staff to confirm project management and communication protocols and establish recurring meetings and reporting schedule and communication methods with ITPT
- Review Islands Trust and Salt Spring-specific plans, policies, and funded projects, as well as same from governance partners relating the SS LTA
- Conduct early outreach and introduction to governance partners and First Nations and report on findings to ITPT

Task 2. Confirm the Engagement and Work Plans

- Review of community context and identified goals that support complete communities through early engagement from Phase 1 with governance and First Nations partners, as well as local organizations.
- In addition to the public, identify governance partners as well as interest groups and identify equity-seeking groups and accessibility needs
- Identify project barriers and risk management strategies
- Present the engagement plan and work plan to advisory planning commissions (APCs) for comment
- Present the engagement plan and work plan, with APC recommendations, to the SS LTC for comments
- Revise the engagement program and the proposed engagement plan and work plan based on comments

Phase 2: Data Analysis

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Task 3. Data collection and synthesis:

- Review plans, policies, and data of SS LTA, in coordination with Islands Trust staff and the Integrated Cadastral Information (ICI) Society, on existing conditions relating to land use, socio-economic, environmental assets, transportation network, and infrastructure servicing based on OCP land use designations, zoning, and housing data
- Collect data from governance and First Nations partners, and local organizations
- Review baseline land suitability analysis information

Task 4. Data Analysis:

- Synthesize data for compatibility and analysis
- Identify issues based on information gathered from the early engagement
- Provide a schematic overview/growth modelling, including servicing systems, servicing capacities, roads, highways, active transportation, archaeological sites and archaeological potential, wetlands, and stream assimilative capacity, based on available collected data

Task 5. Preliminary Report and Recommendations:

- Provide the following based on comprehensive information and data collection and input from engagement:
 - Identify strategic lands inside and outside of the current serviced area within the SS LTA and assess overall technical development potential
 - Identify policy direction related to centres, nodes, corridors, built areas, greenfields, and complete communities
 - Identify development, redevelopment, and intensification opportunities nodes where people can travel to most daily needs within short walking or cycling distances and connect to other services and amenities using transit or other transportation that aim to reduce GHG emissions from transportation

Phase 3: Refine Data Analysis through Engagement

Task 6. Growth Scenarios and Policy Recommendations

- Develop, a draft Complete Community Assessment in collaboration with governance partners and First Nations, demonstration growth scenarios with related mapping, imagery and broad policy implications for housing growth, infrastructure, intensification rates, and conversion of wildlands, and housing typology mix to highlight available options and identify community preference
- Engage with the public and local organizations to gather input on the scenarios
- Based on input received, create a single scenario that reflects a working community vision to inform policy development, accompanied by expanded policy and implementation recommendations
- Following receipt of public input on draft, present to APCs and revise if necessary
- Present a revised Complete Community Assessment to SS LTC for acceptance

Phase 4 – Project Closure:

Task 7. Project Finalization

- Project team acceptance of final report and data
- Finalize grant reporting
- Final invoicing, contract closure

Deliverables

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1. Monthly and as needed progress reports to staff, APCs, and SS LTC, at a minimum, on the four complete community components (housing, daily needs, transportation, and infrastructure)
2. Early and ongoing governance and First Nations partners engagement updates
3. Kick-off meeting
4. Development of confirmed supported work and engagement plans
5. Report on preliminary findings from data analysis
6. Draft Complete Community Assessment
7. Final community assessment report in print and web publishable formats including scenarios and recommendations to manage future development, a capital investments, design interventions and collaborations to support complete community development:
 - a. Policy recommendations and short- and long-term initiatives for implementation;
 - b. Infrastructure considerations
 - c. Identification of areas for additional study, planning, etc.
 - d. Conceptual plans, diagrams, and maps illustrating the main components of the scenarios
 - e. Any data tables in original format collected as part of the project
 - f. Supply all data related to the Scope of Services in both presentable and amendable formats such that there are protected publicly presentable versions and stable, amendable versions for future use:
 - Print documents: PDF and MS Word documents
 - Table data: PDF, MS Excel, or MS Access data base files;
 - Other data as indicated in Schedule B of this RFP

4 CONTRACT

4.1 Contract Terms and Conditions

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

4.2 Service Requirements

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

- Develop a detailed work plan in response to the four components of the services identified in section 3.4 Scope of Services;
- Implement the activities and provide the deliverables identified in the section 3.4 Scope of Services and the approved work plan.

4.3 Related Documents

Appendix A – Islands Trust Contract Template

The following list of material provides some guidance on preparing a proposal. All relevant data and information will be provided upon final execution of the contract:

- [Complete Communities - A guide to geospatial land use assessments for British Columbia's communities](#)
- [Beyond Inclusion: Equity in Public Engagement](#)
- [Islands Trust Policy Statement](#) [under review]
- [Salt Spring Island Local Trust Committee Official Community Plan Bylaw No. 434, 2008](#)
- [CRD Housing Needs Assessment Salt Spring Island, 2020](#)

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- [Housing Action Plan Initiatives](#)
- [Climate Action Report Card 2023](#)
- [Ganges project webpage](#)
- [Salt Spring Island Community Wildfire Resiliency Plan](#)
- [First Nations Engagement Principles](#)
- [Islands Trust Reconciliation Plan](#)

5 REQUIREMENTS

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:

As noted in the scope of services, the proponent team must provide professional capacity and contemporary knowledge of:

1. Geographic information systems in terms of data gathering collection, synthesis, analysis, presentation, and processing in accordance with Schedule B of this document;
2. Equity-based engagement, facilitation and mediation of an array of interest holders, governance partners, First Nations partners, local organizations, and the public
3. Relationship building and culturally inclusive engagement with First Nations partners
4. Ability and qualification to read, interpret and engage on civil servicing plans, reports and strategies
5. Civil engineering including review of servicing, capacity data and linear infrastructure service plans, related to development servicing, as well as transportation planning, active transportation and micro mobility planning, natural hazard reports.
6. Strategic planning in complex multi-agency governance environments
7. Knowledge and experience in engaging with First Nations, including relationship building. Demonstrated experience working with First Nations whose territory intersects with the SS LTA is an asset.
8. Ability to coordinate a complex team and communicate clearly with the public, media, elected officials, managers, and third sector organizations.
9. Economic analysis and demographic modelling

5.1.2 DEMONSTRATION OF RELEVANT EXPERIENCE:

To confirm adequate professional capacities outlined in Section 5.1.1, the Proponent submission must:

1. Provide a resumé of each team member, along with references as outlined in section 5.1.3
2. Provide a work breakdown structure showing hourly contributions by team member for each budgeted step of the work plan

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5.1.3 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 each team member. References from the Proponent's own organization or from named subcontractors are not acceptable. References must indicate what work was done and how they relate to this project.

The Islands Trust 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 Islands Trust reservation of rights under Section 2.22, if the Proponent is deemed unsuitable by the Islands Trust 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 including the information highlighted below:

- a) recurring meeting schedules,
- b) project management approaches
- c) change management policies
- d) budget and expenditures tracking and reporting
- e) identify progress reporting schedules

5.2.2 METHODOLOGY

The Proponent should provide a proposed methodology (such as communication tools, reporting mechanism, and any innovative strategies) to tackle the main components of the Scope of Services summarize below:

- a) Detailed engagement plans for all interest holders
- b) Data collection, synthesis, analysis, and spatial mapping
- c) Scenario mapping, associated policy recommendations, implications, and key messages.
- d) Assessment reports and any data gathering.

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Response Guidelines for Approach

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

5.2.3 WORK PLAN PROPOSAL

Proponents should provide a fee proposal in a spreadsheet, including a detailed explanation of the makeup of the total cost for this project including:

- a) Breakdown of project tasks, personnel responsible, number of hours, total number of staff hours by team member, hourly rates, and total proposal costs for each Phase
- b) Submit a schedule of hourly rates for each team member
- c) All-Inclusive Price should exclude applicable taxes, all applicable taxes may be listed separately.

Proposal should identify both anticipated total hours required, including staff support and charge out rate, and associated pricing for each of the tasks.

The Proposal should clearly articulate any identified exclusions to this Proposal

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 to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed 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 the mandatory criteria will be further assessed against the following weighted criteria.

Weighted Criteria	Weight
Capabilities (section 5.1)	50
Approach (section 5.2)	45
Sub-total	95
Price (section 5.3)	5
TOTAL	100

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

7.3 Price Evaluation

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Price will be evaluated using the following formula:

(Lowest price/your price)*points available

Appendix A – Islands Trust Contract Template

See separate document.

Appendix B – Standards for GIS Data collection

Global positioning system (GPS) specifications

1. General Application

1.01

The target horizontal accuracy is 1 metre. The lowest acceptable horizontal accuracy is 5 metres, at the 95% confidence level. This applies to final map data after averaging (for point features), approximating (for line features), and any editing.

1.02

All GPS receiver systems must be approved Islands Trust GIS staff. Only receiver models which have been tested and proven to be capable of meeting the above accuracy specification in field conditions will be approved.

1.03

At least one person, who is responsible for the quality of the data, must act as a supervisor and have completed GPS-specific training acceptable to Islands Trust GIS staff.

1.04

Field operators must be trained to the satisfaction of the supervisor, including GPS training and other training as required.

Field Parameters and Procedures

2.01

All positions fixes must use at least four satellites. No height constraints can be applied.

2.02

The minimum elevation angle to satellites is 15 degrees above the horizon.

2.03

The maximum Dilution of Precision (DoP) is:

HDOP 5 (preferred in most cases)

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PDOP 8

GDOP 10

VDOP 5 (only if elevations are required)

2.04

For standard static point features, occupation time must be at least 60 seconds AND there must be at least 30 individual position fixes for each feature.

2.05

The maximum distance for point offsets is 25 metres. Directions must be accurate to 2 degrees and distances accurate to 1 metre. If the slope is over 10 percent and over 10 metres long, slope measurements (accurate to 5 percent or 3 degrees) must be made.

2.06

For all line (and polygon) features, all significant deflections and meanders of the feature must be mapped.

2.07

For line (and polygon) features surveyed in dynamic mode, the majority of the individual position fixes must be no more than 2.5 metres apart. The maximum distance between successive position fixes is 10 metres.

2.08

The maximum distance for constant line offsets is 5 metres.

2.09

For line (and area) features surveyed in station-to-station mode, the maximum distance between stations is 10 metres.

2.10

Supplementary traverses (using compass and chain) must begin (Point of Commencement) and end (Point of Termination) on static GPS point features or on survey control monuments of 1 metre or better accuracy.

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2.11

Directions for supplementary traverses must be accurate to 2 degrees and distances accurate to 1 metre. If the slope is greater than 10 percent, slope measurements accurate to 5 percent or 2.5 degrees must be made. The maximum length of an individual traverse leg is 50 metres. There is no limit on the total length of a supplementary traverse.

Data Processing and Mapping

3.01

All position fixes must be differentially corrected in real-time or post-processed. If position corrections are used, the same set of satellites must be used at the reference station as at the field receiver.

3.02

Reference stations (real-time or post-processed) must be approved by Islands Trust GIS staff.

3.03

The maximum age of real-time corrections is 20 seconds from the time the observations are made at the reference station to the time the computed corrections are applied at the field receiver.

3.04

All directions from compass observations must be corrected for declination before offset or traverse computations. If applicable, correction for grid convergence must be made.

3.05

Supplemental traverses must close to better than 1 percent (1/100) of the total traverse distance plus 2.5 metres. Traverse misclosures over 2.5 metres total must be adjusted ("balanced") using the standard compass rule method.

3.06

If true NAD 27 coordinates are required, NAD 83 coordinates must be converted using the Canadian National Transformation, version 2 (NT v2).

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3.07

If elevations are required, they must be converted from ellipsoidal to orthometric using the CRD Geoid model HT 2.0.

3.08

If data in any other coordinate system (e.g., ground coordinates) are required, procedures acceptable to Islands Trust GIS staff and the owner of the mapping must be used.

3.09

Any discrepancies between the GPS survey and existing mapping used as base maps must be resolved to the satisfaction of Islands Trust GIS staff and the local agency(s) considered responsible for the mapping.

Deliverables and Archiving

4.01

The following digital files must be archived and delivered to Islands Trust GIS staff and other appropriate agency(s) in the following formats:

Deliverable	Digital Format
GPS data Uncorrected	GPS manufacturer's proprietary
Reference station data	downloaded format
Originally corrected GPS ☐ Including complete metadata report for all dynamic and static point features, including but not limited to Max HDOP, Max PDOP, and Horizontal Precision	ESRI Shapfile

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Requirement	Description
Experience with ESRI products	Contractors should have experience with ESRI products to work with geospatial data.
Experience with Field Maps Application,	Experience with the mobile data collection app called Field Maps is an asset, as it facilitates data collection in the field. Islands Trust will provide the access and licence to this application.
Geodatabase	Islands Trust should provide a geodatabase with feature classes that are to be used as the template for data collection. This includes the domains that must be used to populate the attribute tables, and the naming convention for collected data. This is the data model. Data that does not fit this model, will not be accepted.
Data Dictionary	A data dictionary with descriptions of symbology and attributes should be provided by Islands Trust to ensure standardized map products are produced. This data dictionary will also give instructions of how to populate the feature class's attributes, and how to display the data on maps.
Standardized process for collecting images	Contractors should use a standardized process for collecting images and attaching them to feature classes (waypoints) using relationship classes.
Separate folder for images	The contractor will submit a separate folder with all images in .jpeg format.
Spreadsheet table for images	The contractor will submit a spreadsheet table that follows a provided naming convention to connect images to the points collected.