

District of Invermere

Request for Proposal

Athalmer Neighbourhood Plan



Issue Date: September 12, 2019
Closing Date: October 18, 2019
Closing Time: 4:00 p.m.
(Local Time)
Closing Location:
Municipal Hall
PO Box 339
914 8th Avenue
Invermere, BC V0A 1K0
Attention: Chris Prosser, CAO
Telephone: 250-342-9281 ext. 1225
Fax: 250- 342-2934
Email: cao@invermere.net

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1.1 Summary of Requirements

The District of Invermere is seeking a firm or individual with a strong track record in community development and land use planning to lead Council and the Community through a detailed land use planning exercise for the Athalmer Neighbourhood.

1.2 Invitation

Individual consultants, businesses or companies with proven experience and expertise in the development of community economic development are invited to respond to this Request for Proposal.

The District of Invermere (D.O.I.) is seeking competitive proposals for a professional community planning consultant to undertake the preparation of an a neighbourhood plan for the Athalmer Area. This involves review of existing policy documents, infrastructure assessment and review, public consultation and alignment with the Imagine Invermere Sustainability Plan and Official Community Plan

1.3 Request for Proposal Terminology

The following terms will apply to this Request for Proposal and to any subsequent Contract awarded. Submission of a proposal in response to this Request for Proposals indicates acceptance of all the following terms:

“Administrator” means the District of Invermere who is responsible for managing and overseeing all aspects of the contract.

“District” means the District of Invermere.

“Contract” means the written agreement resulting from the Request for Proposals executed by the District of Invermere and the successful proponent.

“Contractor” means the successful proponent selected from this Request for Proposals.

“Must”, “Mandatory” or “Required” means a requirement that must be met in order for a proposal to receive consideration.

“Proponent” means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals.

1.4 Project Background

The District of Invermere is situated in the Upper Columbia Valley and nestled between the Purcell Mountains and the Rockies. Invermere is one of the fastest growing resort and recreational areas of British Columbia due to its hospitable climate, natural beauty, high quality of life and recreational opportunities and proximity to large a significant Alberta market place.

The District of Invermere is committed to maintaining our enviable lifestyle, the health of our lake system and exploring orderly and beneficial economic development opportunities within the community and region. Athalmer provides public access for the community to Lake Windermere and the Columbia River Wetlands.

In 2019, the District completed the purchase of the former Lake Windermere Resort Lands to enhance and protect public access to Lake Windermere. With the acquisition, land use and infrastructure planning can begin for those lands and the surrounding neighborhood. The Commercial area is currently within a development permit area controlling the form and character of all buildings. In addition, the District has been receiving inquiries from property owners regarding re-development opportunities within residential neighborhood.

INVERMERE'S COMMITMENT TO SUSTAINABILITY

This plan is guided to be guided by our Sustainability Plan, the community's values and the Natural Step (TNS) sustainability principles and includes a shared vision of what our community will look like in a sustainable future. Moreover, it outlines how our community can achieve this vision through integrated strategies, related actions, and community-wide involvement.

The TNS framework was developed by a community of international scientists as well as business and community leaders. It provides a guide for organizations to strategically progress towards environmental and social sustainability while supporting a healthy economy. The TNS framework provides a systems-level, science-based definition of a sustainable society (i.e. four core principles for a sustainable society) and a planning framework for decision-making.



To reduce and eventually eliminate our contribution to the progressive build-up of materials that are extracted from the Earth's Crust (e.g. heavy metals, fossil fuels).



To reduce and eventually eliminate our contribution to the progressive build-up of synthetic materials produced by society (e.g. dioxins, PCB, DDT etc.).



To reduce and eventually eliminate our contribution to the ongoing physical degradation of nature (e.g. over harvesting fish stocks and paving over critical wildlife habitat etc.).



To reduce and eventually eliminate our contribution to conditions that undermine people's ability to meet their basic needs (e.g. unsafe working conditions, not enough income/profit to live on, restricting freedom of expression, using resources inefficiently, hoarding resources etc.).

By extension, Invermere recognizes that its purchasing decisions provide significant opportunities to move toward this vision of long-range success and sustainability. To support the delivery of these

commitments, Invermere has integrated sustainable purchasing goals into its Municipal Purchasing Policy and Sustainable Purchasing Guide.

In our organization, sustainable purchasing is essentially about including social, environmental, financial and service performance factors in a systematic way. It involves thinking about the reasons for using the product or service, and assessing how these services could best be met. When products are needed, sustainable purchasing involves considering how products are made, what they are made of, where they come from, how they will be used, and how they will eventually be disposed of. It requires strategic decisions to move from products and practices that are currently unsustainable, to products and services that increasingly move us toward our sustainability commitments.

Invermere is looking for proposals that clearly understand these commitments, actively integrate our four sustainability objectives in project design and delivery – and measurably move our community further along the journey toward success and sustainability as articulated within our **Imagine Invermere** vision.

1.5 Closing Date and Location

To be considered, proposals must be received in a sealed envelope no later than 4:00pm MST (Local time), **October 18, 2019** (the “Closing Deadline”), at the following address:

Attention: Mr. Chris Prosser, Chief Administrative Officer
District of Invermere
PO Box 339
914 8th Avenue
Invermere, BC V0A 1K0

Proposals and their envelopes must be clearly marked with the name and address of the proponent and the name of the Project: **“Request for Proposals: Athalmer Neighbourhood Plan”**.

Your proposal package must include two hard copies, along with one digital copy, in pdf format on USB flash drive of your submission.

Proposals submitted by facsimile or email will not be accepted without prior approval of the District.

Proposals received after the closing deadline will not be accepted.

1.6 Enquiries

Copies of the Request for Proposals are available from the address listed above and by email sent to: cao@invermere.net. Questions regarding this Request for Proposals should be directed to Mr. Chris Prosser, Chief Administrative Officer, at 250-342-9281 ext. 1225, or by email to the above address.

1.7 Ownership of Proposals and Freedom of Information

All documents, including proposals submitted in response to this Request for Proposals become the property of the District of Invermere. They will be held in confidence by the District, subject to the provisions of the Freedom of Information and Protection of Privacy Act. Once a contract has been awarded, the name of the successful proponent will be available to the public upon request.

1.8 Proposal Content

The contractor's proposal must convey a clear understanding of the work to be undertaken as described in the Request for Proposals. The proposal must specifically address all requirements of this project. Clarity, style, organization, visual impact and scope are factors that should be considered in its preparation.

Proposals are to be submitted in the format described below:

1. Title Page
2. Table of Contents
3. Transmittal Letter
4. Project Schedule and Timeline
5. Experience (Examples of work)
6. Financial Proposal
7. Supporting Information (Appendices, etc.)

Title Page

Referencing the Request for Proposals title, the firms name, address, contact information and date of proposal.

Table of Contents

This will show the title of each subsection referenced to a numbered page and also list the title of any appendices and supplementary information.

Transmittal Letter

Include a signed letter briefly stating an understanding of the work, the commitment to perform the work within the time period, the benefits they bring to the project and why the firm believes itself to be the best qualified to perform the work.

Project Schedule and Timeline

This section shall present the contractors project schedule and timeline. This will include scheduling from the initial meeting, community consultation and development plan to submission of final documents to the District.

Experience

This section shall provide information on specific experience related to this project for the firm and project manager.

Financial Proposal

All proposals shall include a section that contains:

- Total Price
 - The total price to complete the Project
 - Proposal Price shall be broken down to detail:
 - Fees for professional services.
 - Disbursements (travel, reproduction, telephone, meetings, etc.)
 - It is the responsibility of the vendor to determine what taxes, levees or fees are applicable in British Columbia and to include them in the proposed prices.
- Billing Rate Summary:
 - A summary of the hourly billing rates. These rates shall be firm and fixed for the duration of the project.

Supporting Information

The contractor may include any information relevant to the evaluation of their proposal and expertise.

1.9 Project Scope and Objectives

The scope and objective of this project is the development of a neighborhood plan for the Athalmer Area (as defined on attached Schedule "C") that will be integrated into the Official Community Plan, and includes the following;

- Review and updating all background information, mapping and appearance of the planning document to integrate within the current Official Community Plan (OCP);
- Creation of an inclusive of a public engagement strategy including community based

- engagement sessions and open houses, surveys and direct stakeholder participation;
- Review and update the future land use plan within the OCP for the Athalmer area;
- Review and update the development permit area requirements and design guidelines for the Athalmer area including form and character, urban design, energy efficiency and emission reduction, interface fire and climate change mitigation;
- Develop a concept plan for the future re-development of the former Lake Windermere Resort Lands and Lake Windermere Waterfront that is formed based upon Council and community consultation.

Startup and Process

The process identified will provide community engagement opportunities to:

- Align the neighborhood plan with Imagine Invermere ICSP structure and directions.
- Creation of an advisory committee that will provide input through all phases of the project.
- Review and confirm the Descriptions of Success for the neighborhood plan as they relate to the strategy areas in the ICSP (Buildings and Sites, Land Use and Natural Areas, Transportation and Mobility, Water and Waste, as well as Economy).
- Review land use designations for consistency with the ICSP directions, including proposed revisions to land use designations.
- Review existing Development Permit Areas and need for additional DPAs based on the ICSP.
- Review existing infrastructure and determine any additional infrastructure needs.
- Develop policies consistent with Regional Economic Development initiatives in the OCP. Policies based on the goals identified in the ICSP and with additional community / Regional input on key strategies, short, medium and long-term actions and implementation plans..
- Incorporation of the updated Housing Needs Assessment, including the existing housing stock, household characteristics, and future demand in order to support OCP-level housing policies that provide affordable and adequate housing for all residents, including the seasonal workforce.
- Develop clear objectives and policies for land holders, developers, Council, and staff, for the evaluation of future development proposals in order to address the City's sustainability, growth management, and Smart Growth objectives (aligned with ICSP).

KEY IMAGINE INVERMERE DESCRIPTIONS OF SUCCESS

The proposed project outlined within this RFP supports our community's movement toward a number of **Imagine Invermere's** descriptions of successes¹. Through this RFP Invermere is looking for project teams that can effectively execute this project in a manner that helps move our community toward our **Imagine Invermere** vision.

AVAILABLE RESOURCES

Invermere will provide access to the following information sources as required:

- **Imagine Invermere Integrated Sustainability Plan – Appendix "A"**
- **Imagine Invermere Official Community Plan – Appendix "B"**

1.10 Scheduling

It is anticipated that this project will run from January 1, 2020 to June 1, 2021. All work schedules must incorporate the approximate start and end dates. Key milestones must be highlighted.

1.11 Criteria

The proposals will be evaluated and rated based on both the Mandatory and Desirable Criteria set out in this Request for Proposals document.

Mandatory Criteria

- Proposals must be in English, and the Proposal must be submitted by the appropriate date and time;
- The proposal must be signed by the person authorized to sign on behalf of the proponent;
- Proposals must contain responses to information requested, based on the criteria of this Request for Proposal document to demonstrate ability to carry out the terms of the contract, delivery of a quality product and/or service within an appropriate budget.
- Proposals must clearly list, in detail, what services will be provided with the associated costs for each component.
- Responses must contain a list of references of past projects and work of this nature,

¹ A Description of Success is our community's articulation of what a successful and sustainable Invermere would look like in the year 2030. They interpret the sustainability objectives as well as the community priorities within 9 strategy areas. For more information, visit imagineinvermere.ca

with contact names and telephone numbers.

Desirable Criteria

- A proposed content outline by component and sub-section for the final product.
- Examples from other communities that exhibit components that you feel could fit the scope and nature of the products the District is looking for, and explain the rationale for your position.
- Demonstration of willingness to be flexible in working with the District.

1.12 Other Obligations

- The selected consultant will be required to enter into an agreement with the District, for the completion of the project.
- The proposal submitted to the District in response to these terms of reference will form part of the agreement and will include, if necessary, any adjustments, additions or deletions as agreed to by the District and the consultant prior to signing the agreement.
- The District is prepared to assist the consultant by providing any information that can reasonably be made available.
- The consultant acknowledges that the offers contained in their proposal shall remain open for acceptance by the District for a period of one hundred and twenty days from the closing date for the receipt of proposals.
- The consultant may not proceed to the next stage without approval of the District and the District shall not pay invoices submitted by the consultant until the stage is completed to the satisfaction of the District.
- The District reserves the right to cancel the consulting contract at any time with appropriate compensation for authorized work completed up to the date of notice.

1.13 Evaluation

Invermere reserves the right to select the consultant best suited for this project and intends to evaluate Proposals as fairly as possible. Invermere reserves the right to make changes to the evaluation process prior to the Proposal submission date.

The successful firm will have the following skills:

- Experience in collaborative community development and gaining “buy-in” from diverse community groups and residents;
- Ability to make recommendations regarding implementation of the strategy;
- Creative and dynamic approach to the economic development process;
- Familiarity with the local government setting.

EVALUATION SCORING MATRIX

Invermere will select the Proposal that it deems, in its sole and absolute discretion, demonstrates the best combination of corporate experience, skilled and experienced personnel, project understanding, vision, proposed approach to achieving the project goals, as well as project budget. The following table details the proposed evaluation scoring approach:

Evaluation of proposals, using the scoring methodology set out above, will be undertaken by the District. A short list of the highest scored proponents will be developed. Proponents on the short list may be invited to make a presentation to the District. After the presentation(s), the District will re-evaluate the short-listed proposals using the criteria set out in this Request for Proposals, including reference checks. The final selection will be based on the District's determination of the best scoring and final approval by Council.

Criteria	% Evaluation
1. Project Understanding	
Creativity and Familiarity- Provide a brief description of the Upper Columbia Valley that clearly shows you are familiar with the community, the region and British Columbia and the characteristics the community has that would attract investors, residents and visitors. The delivery may take any format such as audio, written, video, etc.	20%
2. Proponent Qualifications	
Previous Experience in undertaking similar work - indicate the number of projects of similar professional services and type or the number of projects of similar scale. Examples and samples of creative public engagement processes and other reports of a similar nature that have been prepared by the team. Demonstration of willingness to be flexible in working with the District.	
Team Knowledge - Skills and abilities, education, professional qualifications, professional development. Include a description of your business/organization, partners/staff, history/experience and the main contact person who will be the signatory to a contract for this project.	20%
References – Provide three references from previous clients including specific contacts and phone numbers.	
3. Approach and Methodology	
A work plan including the proposed method to accomplish the tasks identified in the Request For Proposals. Provide a brief description of your approach to develop the vision for content, style, structure, motif etc. of the final products, based on the requirements provided in this Request for Proposals including explanation of any deletions or additions you would make. Please demonstrate creativity in the approach to engage the public.	25%
4. Sustainability & Innovation Attributes	
<ul style="list-style-type: none"> Substantially integrates Invermere’s sustainability objectives into the project design, methodology, implementation and long-term project legacy Demonstrates substantial awareness and understanding of leading examples and relevant precedents appropriate to this project Proposes innovative solutions to sustainability-oriented challenges Clearly moves our community toward its Imagine Invermere vision as measured by established Imagine Invermere metrics. 	25%
5. Cost	
Budget – Ability to stay within the allocated budget.	10%
total	100%

1.14 Project Cost and Financial Information

The consultant will invoice the District as stated in the financial section of the contractor's proposal.

Please note that the total budget for this project is set at range of \$100,000 to \$150,000, inclusive of all project fees, expenses, disbursements and taxes.

1.15 Discrepancies of Omissions

Proponents finding discrepancies or omissions in the Request for Proposals documents, or having any doubts to the meaning or intent of any part thereof, should immediately notify Mr. Chris Prosser in writing by e-mail (cao@invermere.net) who may send written instructions or explanations to all proponents on record with the District. No responsibility will be accepted for oral instructions. Addenda or correspondence issued during the Request for Proposals period shall be considered part of this document and become part of the final Contract documents.

1.16 Irrevocability of Proposals

Prior to the time and date of the Request for Proposals closing deadline, any proponent may withdraw or change their proposal without penalty or forfeiture, by giving notice in writing to: Mr. Chris Prosser – District of Invermere, PO Box 339, 914 8th Avenue, Invermere, BC V0A 1K0. Upon the closing deadline, all proposals become irrevocable and no words or comments may be added to, or removed from, the proposal unless requested by the District for purposes of clarification. By submission of a proposal, the Proponent agrees that should its proposal be deemed successful, the Proponent will enter into a Contract with the District.

1.17 Liability for Errors

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

1.18 Agreement with Terms

By submitting a proposal the Proponent agrees to all the terms and conditions of this Request for Proposal. Proponents who have obtained the Request for Proposal must not alter any portion of the document, with the exception of adding information requested. To do so will

invalidate the proposal.

1.19 Modification of Terms

The District reserves the right to modify the terms of the Request for Proposal at any time at its sole discretion.

1.20 Proponents Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the District, if any. Short-listed proponents may be asked to make a presentation to Council and the Steering Committee, which will be solely at the Proponents own expense. If the District elects to reject all proposals, the District will not be liable to any proponent for any claims, whether the costs or damages incurred by the Proponent in preparing the proposal, travel to present the proposal, or loss of anticipated profit in connection with any final Contract or any other matter whatsoever.

1.21 Acceptance and Rejections of Proposals

The District may not necessarily accept the lowest priced proposal or any proposal. At its sole discretion, the District reserves the right to reject any or all proposals received and to accept any proposal which it considers advantageous, whether or not it is the lowest priced proposal. The District is not under any obligation to award a contract, and reserves the right to terminate the Request for Proposal process at any time, and to withdraw from discussions with all or any of the Proponents who have responded. The District shall not be obligated in any manner to any Proponent whatsoever until a written agreement has been duly executed relating to an approved proposal. No Contract is formed as a consequence of this Invitation to Submit Proposals. The District reserves the right to accept the proposed offer in total or in part, to reject any or all offers, to waive any minor informalities, irregularities, or technicalities, and to accept the offer deemed most favourable to the District. Proposals must meet all the requirements herein to be eligible for consideration. Proposals that are unsigned, incomplete, conditional, illegible, unbalanced, obscure or that contain additions not called for, reservations, erasures, alteration, or irregularities of any kind may be rejected. The District reserves the right to obtain additional information from the Proponents to clarify the information in their submission. In the event that only one proposal is received, the District reserves the right to return the proposal unopened. Proposals received after the closing time will not be opened.

1.22 Submission Requirements

Proposals must include the following:

- Cover letter introducing the consultant, clearly identifying the contact person.
- Information, and reviewing the background and qualifications of the firm.
- An explanation of the methodology proposed to undertake the project.

- A work plan and budget for all deliverables.
- Two samples of similar work done for other clients and letters of reference.
- A listing of expectations (i.e. information, meeting scheduling, access to Council) or District staff for project completion.

Consultants submitting a proposal must sign the document for it to be accepted. The legal name and address of the proponent is to be used on the proposal documents.

1.23 Withdrawal

A proponent may request that their proposal be withdrawn prior to the submission deadline. A signed written request must be submitted to the Chief Administrative Officer via email, mail or fax. All requests for withdrawal will be placed on record and the proposal package will be returned, unopened, to the proponent.

1.24 Contract Negotiation

The District reserves the right to negotiate specific terms of the contract with the short-listed proponents prior to the final award of the contract. The District also reserves the right to negotiate specific terms of the contract with the contractor as the contract progresses.

1.25 Solicitation of Employees, Council, or Select Committee Members

Bidders and their Agents are hereby warned that any attempt to solicit individual members of the Council and/or Staff of the District or members of the Steering Committee in regard to the award of this contract may jeopardize the favourable consideration of their proposals.

1.26 Confidentiality and Security

This document or any portion thereof may not be used for any purpose other than submission of a Proposal. The successful Proponent shall agree not to divulge or release any information that has been given to it or acquired by it on a confidential basis during the course of carrying out its duties or performing its services. It is the District's policy to maintain confidentiality with respect to all confidential information related to the Requests for Proposals, but the District is subject to the Freedom of Information and Privacy Act.

1.27 Workers Compensation Act

For the purpose of the contract the successful proponent must provide to the District proof of coverage under the Worker's Compensation Act.

1.28 In Closing

Thank you for your interest in submitting a proposal. It is hoped that the information provided is of value and should anything be unclear, please contact Mr. Chris Prosser directly.

The Terms of Reference and the Request for Proposal are not intended to rule out innovation on the part of the contractor. If contractors believe a more desirable end result can be achieved by deviating from specific details, this should be outlined in the proposal. This will be reviewed with the contractors and finalized prior to starting the project.

Formal lines of communication and reporting schedules shall be established to maintain a sufficient level of information exchange for decision making.

Evaluation and final decision resulting from proposals received will be carried out by the District staff.

Appendix “A” – Imagine Invermere Sustainability Plan

Webpage Link:

<https://invermere.civicweb.net/filepro/document/32275/Imagine%20Invermere%20Integrated%20Community%20Sustainability%20Plan.pdf>



Appendix “B” – Imagine Invermere Official Community Plan

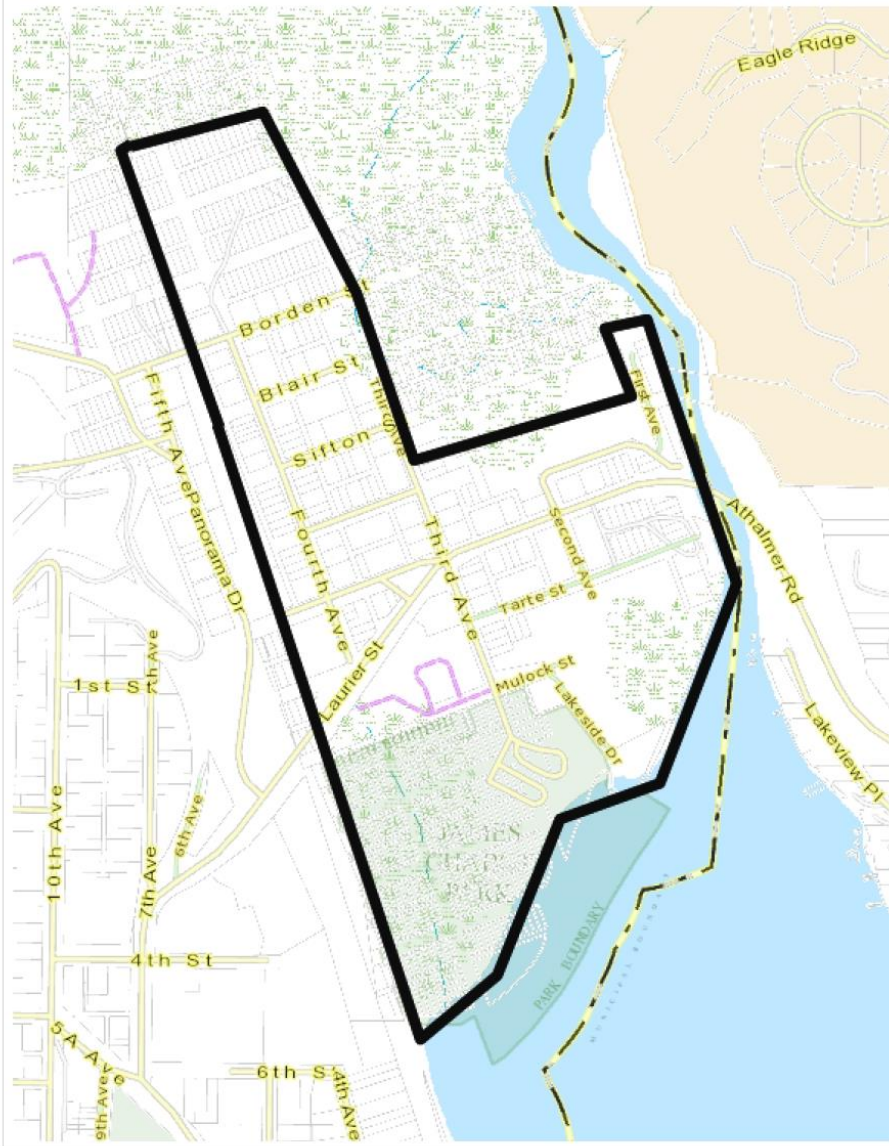
Webpage Link: <https://invermere.civicweb.net/filepro/document/23166/2015%20OCP%20update.pdf>

Appendix "C" – Project Area (Planimetric and Airphoto)

Athalmer Planning area

Legend

-  Lot Line
-  Right of Way
-  District Lot



Notes:

309 0 154 309 Meters
WGS_1984_Web_Mercator_Auxiliary_Sphere
RDEK GeoViewer - 9-12-2019 11:52 AM

Scale = 1: 12,337



THIS MAP IS NOT TO BE USED FOR NAVIGATION

This map is a user generated static output from an Internet mapping site and is for reference only. Data layers that appear on this map may or may not be accurate, current, or otherwise reliable.

Legend

- Lot Line
- - - Right of Way
- District Lot



Notes:

259 0 129 259 Meters

WGS_1984_Web_Mercator_Auxiliary_Sphere
RDEK GeoViewer - 9-12-2019 11:49 AM

Scale = 1: 10,347



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