



District of Squamish
Request for Proposals

**Zoning Bylaw Review
Consulting Services**

TERMS OF REFERENCE

District of Squamish Zoning Bylaw Review Consultation Services

A. INTRODUCTION

The District of Squamish is seeking proposals from selected consulting firms with proven experience in community consultation and workshop facilitation to develop and run a consultation program as part of the Zoning Bylaw Review.

District of Squamish Council has identified the review the current Zoning Bylaw (No. 1342, 1995) as a priority for 2010. To accomplish this, they have endorse an approach that will utilized the services of two consulting teams – one focused on developing and facilitating a consultation program and one focused on the technical components of the Bylaw.

The Consultation Services team will work closely with Planning Department staff and the Technical Services team to ensure that the results of the consultation program are accurately reflected in the scope and content of the technical component.

B. SCOPE OF WORK

1. Background

Squamish Council has identified that a review of Zoning Bylaw No. 1342, 1995 is a priority project for 2010. Funding has been included in the Planning Department budget for 2009 and 2010 to complete the review.

2. Description of Work - Consultation Services

The Zoning Bylaw Review is organized into the following four phases:

- Issue Identification
- Technical Review
- Bylaw Preparation
- Approval

The selected consulting team will be required to prepare a consultation program that consists of a series of workshops and input opportunities through the first two phases of the Zoning Bylaw Review, including summary reports for each. In addition, the proposal should include a suggested approach for obtaining feedback on the draft Zoning Bylaw following the completion of Phase 3. Consultation services will not be required through the formal bylaw approval process (Phase 4).

While the details and timeline for the Consultation Program will be finalized through discussions with the Planning Department, the following workshop descriptions are included as a starting point for developing the Program:

Phase 1 – Issue Identification Workshops

The consultant will organize and facilitate workshop with District Council, staff and representatives of the development industry to identify the strengths and weaknesses with various sections and discuss the components of the Zoning Bylaw where there are questions of interpretation, definitions and land use. Additional discussion items may also include parking requirements and standards, multi-unit residential, commercial and industrial zone regulations.

The preparation of an Issues Summary Report by the consultant and its presentation to Council will conclude Phase 1.

Phase 2 – Technical Review Workshops

Following the completion of an initial technical review of the Zoning Bylaw and preparation of a report to Council, the Consultation team will be required to organize and facilitate a series of workshops with municipal staff and representatives of the development industry to review the results of the technical review and identify any additional or outstanding items that have not yet been addressed from the Issue Identification phase.

The preparation of a Technical Review Workshop Summary Report by the consultant and its presentation to Council will conclude Phase 2.

Phase 3 – Bylaw Preparation

The proposal should include a suggested approach for obtaining feedback on the draft Zoning Bylaw.

3. Requirements

The successful consultant will complete the tasks below:

- Develop a consultation program for the Zoning Bylaw Review in co-operation with the Planning Department;
- Identify opportunities and methods for input into the Zoning Bylaw Review;
- Prepare summary reports following key stages of the Review;
- Present the outcomes and summary of consultation workshops to staff and Council; and
- Activities that support the overall Consultation Program as mutually agreed by the District and consulting team.

4. Deliverables

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

- Detailed Consultation Program outline, including workshop details, preliminary agendas and workshop materials;
- Preliminary Summary reports at the conclusion of each identified Phase of the Review;
- All materials suitable for presentations to Council or members of the general public; and

- Any supporting items as mutually agreed by the District and consulting team.

In addition, the consultant is responsible for providing 15 full colour printed copies of each of the Final Summary Reports and one digital copy at the end of each Phase of the Review.

All reports shall be prepared in MS Word 2000 format and any other format as mutually agreed. All graphs, base data or statistics shall be provided in MS Excel format.

5. Timelines

The District targets January 2010 as the start date for Phase 1 of the Zoning Bylaw Review. Proposals should identify milestones for each Phase or major task in the project, recognizing February 2010 as a month where no consultation events are to be scheduled.

Preliminary Summary Reports for each consultation Phase are required within two weeks (2) of the last event in each Phase. The deadline for the Final Summary Reports for each Phase will be determined through discussions with the District of Squamish Planning Department.

C. PROPOSAL REQUIREMENTS

The Proponents are asked to provide the following:

1. Project Implementation, Personnel and Related Experience

- a. Description of the team's expertise and qualifications;
- b. Which of the team's members will be responsible for specific tasks;
- c. Resume of team members, and their experience with similar projects including client reference;
- d. Subcontractors, if applicable;
- e. Proposed study approach;
- f. Proposed work program and schedule of key tasks;
- g. Total fee for service (including total hours and budget for each team member) – include taxes, travel expenses and other disbursements.

2. Estimate of Costs for Proposal

In a spreadsheet format, provide a detailed breakdown of estimated costs to carry out each of the tasks, identifying staff, estimated hours per task, and hourly charge out rates. The total contract price shall be inclusive of all applicable taxes and contingency.

It is intended that the proposal indicate the complete cost of completing the project. Be sure to include the following estimated expenses (disbursements) as part of your overall estimate of costs:

- Travel, accommodation and meal expenses
- Long distance telephone, facsimile, postage and other identifiable communication expenses, at cost
- Secretarial and copying expenses

- Vehicles
- Databases, air photos, maps, film and film reproduction, photocopying, video camera

In addition, administrative costs should be shown as a percentage of the estimated cost of the work.

3. Budget

The budget for the Zoning Bylaw Consultation Services contract is \$30 000. Proposals must include a description of budget expenses including a rationale for a proposed budget in excess of the total budget allocation.

D. EVALUATION AND AWARD

1. Contract Award

Depending on the proposals submitted in response to this RFP, a contract would normally be negotiated and executed with the leading proponent (the "front-runner") selected in accordance with the evaluation format contained in this RFP. The lowest price or any proposal will not necessarily be accepted.

The District reserves the right to:

- refuse award of the contract to a proponent the District judges to be fully or over committed on other projects;
- refuse award of the contract to a proponent where, in the District's sole opinion, the proposal does not represent fair value;
- refuse award of the contract to a proponent where, in District's sole opinion, the proposal price is considered too low to properly perform the contract; and
- in the case of a sole proposal being received, either:
 - a. cancel the RFP, return the proposal unopened to the proponent, and re-solicit proposals for better response with or without any change being made to the RFP; or
 - b. open the proposal without reference to the proponent, and, if such proposal does not merit contract award under the terms and conditions of this RFP, cancel the RFP and re-solicit proposals with or without any change being made to the RFP.

2. Clarification

Notwithstanding that a presentation/interview process has not been indicated in the Proposal Evaluation Form, at the District's sole discretion, one or more proponents may be asked to provide additional clarification respecting their proposals, or to address areas where the District clarifies its needs.

3. Suitability of the Front-runner

The front-runner may be interviewed and/or the District may conduct such independent reference checks or verifications as are deemed necessary by it, to clarify, test, or verify information contained in the proposal and to confirm the suitability of the front-runner. If the

front-runner is deemed unsuitable by the District, or if the proposal is found to contain errors, omissions or misrepresentations of a serious nature, the originally selected front-runner may be rejected and another proponent selected as the front-runner according to the evaluation format, or the District may choose to terminate the RFP process and not enter into a contract with any of the proponents.

The District may interview key persons to assess their scientific, technical or managerial abilities and to determine if they would be adequate for the proper performance of the proposed contract.

4. Negotiation with the Front-runner

Negotiations may be held with the front-runner including, but not limited to, matters such as:

- price, insofar as a change in price is directly associated with a change in the proposal
- as a result of negotiations;
- changes in technical content;
- contract details;
- contract payment details; and
- expectations of the parties applicable to the service requirements.

If a written contract cannot be negotiated within fourteen work days of notification to the front-runner, the District may terminate negotiations with that proponent and negotiate a contract agreement with another proponent selected as the front-runner according to the evaluation procedure, or may choose to terminate the RFP process and not enter into a contract with any of the proponents.

The District shall not be obligated in any manner to any proponent whatsoever until a written contract has been duly executed relating to an approved proposal. The District reserves the right to modify the RFP at any time during the negotiation phase without notification to other proponents.

E. DISTRICT OF SQUAMISH PROJECT MANAGER

The consultant will report directly to the Director of Planning. The primary staff liaison will be a District of Squamish Planner. The Planner will provide information to the consultants as required, and will be available for meetings, discussion and review of draft concepts. Proposals should clearly identify the number, purpose and timing of meetings.

F. PAYMENT FOR SERVICES

Payment to the consultant would consist of two parts:

1. a fee based on hours worked times an all inclusive hourly rate (rate quoted would include the cost of the computer and any other equipment required to perform the work), and

2. expenses (i.e., travel costs to assess certain parts of the study reach or to present results at a meeting).

The fees plus expenses must not exceed the price quoted without the prior written approval of the Director of Planning. The contract price will be the price quoted. Billings would be monthly or for longer time periods.

G. CONSULTANT SERVICES AGREEMENT

The successful proponent will enter into an agreement (attached) for provision by the consultant of services on this assignment.

H. CLOSURE DATE

The closing date and time for submission of the Request for Proposal is **December 18, 2009** at 4:00 p.m. Submissions should be sent to:

Jim Charlebois, Planner
Planning Department
District of Squamish
37957-2nd Avenue
Squamish, BC
V8B 0A3

Five complete copies of the proposal must be received at the location and before the time specified in the Notice. Proposals must be submitted in sealed envelopes clearly marked with the name and address of the proponent and the words, "Proposal for District of Squamish Community Energy Action Plan" on the envelope. All envelopes shall be sealed and marked "**Confidential**".

Proponents are solely responsible for timely delivery of their proposals to District of Squamish location specified.

I. ATTACHMENTS

'Annex A' – Consulting Services Proposal Evaluation Form

'Annex B' – Standard Form Consulting Services Agreement

Proposals will be evaluated and the consultant selected on the basis of:

- Quality of proposal and methodology, including any unique or innovative approaches to the project

- Demonstrated understanding of the scope of work and issues
- Previous experience of the project team members in completing similar projects
- Public consultation plan and previous experience
- References from other jurisdictions or clients
- Budget and timelines



PURCHASING POLICY ADDENDUM

Annex 'A'
CONSULTING SERVICES PROPOSAL EVALUATION FORM

INSTRUCTIONS:

Use separate form for each proposal being evaluated. For each factor mark your rating by circling the number in the appropriate column. If a factor is not applicable for this proposal call, circle 1.0 for the factor. If the factor is applicable but this consultant fails, assign 0 to the factor. (See reverse side of this form for interpretation of rating factors.)

Multiply the number in the "WEIGHT" column by the number you circled and write the result in the WEIGHTED TOTAL column. Add the WEIGHTED TOTAL column to get the rating for this consultant.

Transfer the totals to the Proposal Summary Sheet.

PROPOSAL NAME: _____

RATED BY: _____

CONSULTANT: _____

DATE: _____

FACTOR WEIGHT OUT OF 100	PLEASE CIRCLE APPROPRIATE COLUMN					WEIGHTED TOTAL
	Poor	Marginal	Fair	Good	Excellent	
Capability [25]						
Proj. Mgr. Experience [7]	0.3	0.5	0.7	0.9	1	
Company Experience [6]	0.3	0.5	0.7	0.9	1	
Team Quality [12]	0.3	0.5	0.7	0.9	1	
Methodology [12]						
Quality of Proposal [2]	0.3	0.5	0.7	0.9	1	
Work Plan (procedure) [10]	0.3	0.5	0.7	0.9	1	
Level of Effort (man hours) [10]	0.3	0.5	0.7	0.9	1	
Innovative Considerations [4]	0.3	0.5	0.7	0.9	1	
Acceptable Appendix [4]	0.3	0.5	0.7	0.9	1	
Liaison/Coordination [4]	0.3	0.5	0.7	0.9	1	
Realistic Inspection [6]	0.3	0.5	0.7	0.9	1	
Historical						
Performance [20]						
Fees & Personnel [6]	0.3	0.5	0.7	0.9	1	
Keeping to Appendix [4]	0.3	0.5	0.7	0.9	1	
Design Problems [6]	0.3	0.5	0.7	0.9	1	
Contract Administration [4]	0.3	0.5	0.7	0.9	1	
TOTALS 85						



PURCHASING POLICY ADDENDUM

Annex 'B'
CONSULTING SERVICES PROPOSAL EVALUATION FORM
SUMMARY

Point totals for each consultant are an average of the points given by all evaluators.

Proposal Name: _____ Date: _____

Factor	Weight out of 100	AVERAGED CONSULTANT POINT TOTALS					
		Cons. #1	Cons. #2	Cons. #3	Cons. #4	Cons. #5	Cons. #6
Capability	25						
Methodology	40						
Historical Performance	20						
Sub-Total	85						
Engineering Fees (Design phase only)		\$	\$	\$	\$	\$	\$
Cost Points *	15						
Total Points	100						

* Note: The lowest cost proposal receives 15 points. Other proposals are awarded points as follows: Points = 15 - [(Y/L-1) x SQRT(L)/10], where L = the lowest cost proposal, and Y = the proposal being rated.