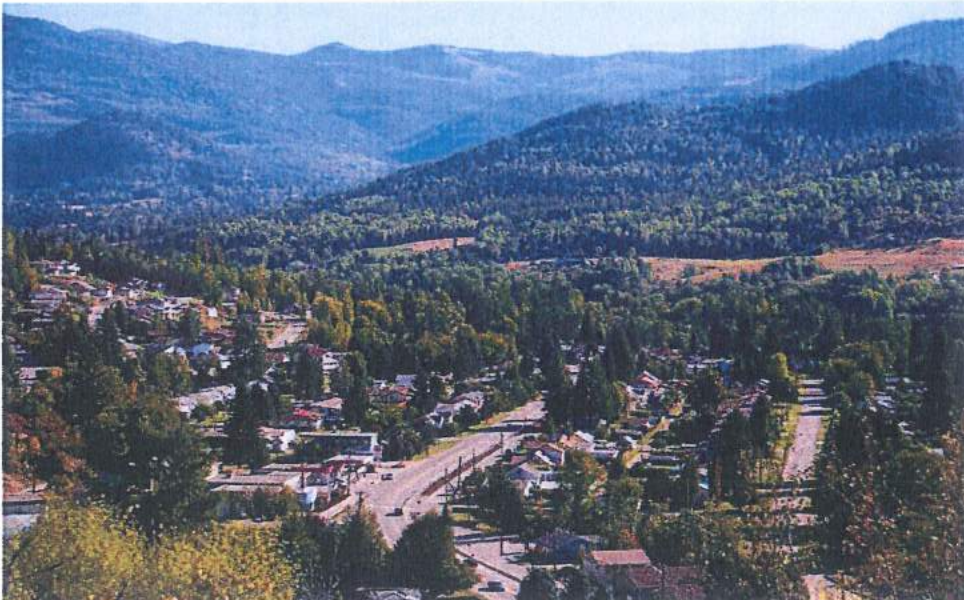




# Request for Proposals Official Community Plan Bylaw

RFP #: 2019-001



**Proposals to be submitted by Mail, Courier or Hand Delivered**

Three (3) printed copy and one (1) electronic copy on CD or USB stick in envelope clearly marked with the name and address of the Consultant and "Request for Proposals – Official Community Plan Review" must be delivered by mail, hand or courier to: Larry Plotnikoff, Chief Administrative Officer

Village of  
Montrose

Mailing  
address:

PO Box 510, Montrose BC  
VOGIPO Street Address:  
565 - 11th Avenue,  
Montrose BC,  
[cao@montrose.ca](mailto:cao@montrose.ca)

**Closing Date and Time:**

Proposals must be received no later than 4.00 pm PST Monday, September 9, 2019

Proposals can be submitted in confidence and will not be opened in public. It is the responsibility of the Consultant to check for Addenda which may be posted to the Village of Montrose website: <http://montrose.ca/>.

A Consultants' meeting will not be held.

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## Background

The Village of Montrose is seeking competitive proposals for professional planning consultant to undertake the preparation of a new Village of Montrose Official Community Plan (OCP) Bylaw.

The Village of Montrose has a population of approximately 1,000 residents and is located approximately 5 km. east of the City of Trail in the West Kootenay region of BC. Historically Montrose has served as a bedroom community for the Lower Columbia region, and has very little commercial businesses and no industrial base. The Lower Columbia Region consists of five municipalities and two rural areas within a twenty kilometer radius. The region is the West Kootenay's centre for health care and heavy industry. The region is popular for fishing, skiing, hiking, golfing and many other outdoor activities.

The Village's Official Community Plan (Bylaw # 669 - OCP) was last updated in 2008. In the last eleven years since the adoption of the OCP, some local and regional changes have occurred, and the world has become a much different place.

On the broader scale, we have seen the impacts of climate change, global economics, interest rate fluctuations, non-traditional business models, changing demographics and population migration, which in turn have had real local impacts in the areas of: natural disasters, wildfire and flooding, industry closure, available housing choices, housing affordability, business investment decisions and tourism. The Village of Montrose is not immune to these broader influences.

On the provincial level, legislation has changed to allow local governments more options to respond to changing conditions, and mandatory requirements have been added to meet provincial objectives.

The OCP is one of the principal means available to local governments to engage their community in the creation and implementation of a future community vision, strong and resilient in the face of changing times and changing conditions. A healthy community is one that demonstrates economic, environmental, and social sustainability, and in planning for its future, the Village of Montrose needs to consider all these factors and how they interact to affect Council's decision making.

The development of a new Official Community Plan should be a community building process, an opportunity for the community to come together in the early part of Council's term to help Council examine current realities, refine the vision for the community, and participate in establishing policies that will help the community achieve its goals.

Accordingly, we request proposals from consultants with proven inter-disciplinary experience in master planning, urban design, transportation planning, community and stakeholder consultation, land use regulation and bylaw preparation to assist the Village of Montrose in generating a new vision-driven Official Community Plan that will provide direction to the community and a guide for Council in its future decision making.



## B. Project Scope

### General

The primary objective of this project is to complete a comprehensive and up to date Official Community Plan that enables vision-based development in Montrose.

The successful Consultant will be expected to achieve the following:

- A public and stakeholder strategy that will encourage meaningful public input and the development of a vision for the Village's future; and
- A complete and up to date Official Community Plan that complies with all legislative requirements, sets clear and understandable objectives and policies to guide property owners, developers, Council and staff, and is aligned with other Village strategies and plans.

## C. Description of Work

The following project phases and tasks are anticipated:

### Project Initiation

- Introduce the consultant team to staff and Council and establish key staff level contacts, and procedures;
- Develop, with staff, a detailed work plan for the overall project with key deliverables and milestones identified;
- Develop a practical community and stakeholder consultation strategy to maximize the quality of local input;

**Deliverable: Detailed work plan including community and stakeholder consultation process.**

### Technical Review and Issues Identification

- Update realistic population projections, existing land uses and densities, housing characteristics;
- Identify future land use needs, alternative growth strategy scenarios; and
- Consult with staff, Council, business and community groups to identify known issues, priorities, challenges and opportunities.

**Deliverable: Summary report that identifies community challenges and opportunities, major issues, alternative scenarios or options.**

### Community Exploration and Visioning

- Conduct focus groups, public meetings or other methods of engagement to explore major issues;
- Collect and analyse focus group and community input.

**Deliverable: Report on technical review, focus group/public consultation, issue identification and prioritization. Presentation of findings to staff and Council.**



#### Preparation and Presentation of Draft OCP Bylaw

- Prepare draft OCP Goals, Objectives, Policies based on input from staff, Council, community and stakeholder consultation;
- Prepare draft OCP graphics and mapping.
- Council may wish to specify additional opportunities for gaining public comment in addition to the statutory Public Hearing. These may include one or more Open Houses or community displays prior to and leading up to the Public Hearing. The Consultant would be expected to present to the Public Hearing.

**Deliverable: Draft OCP and schedules. Presentation to Council for first and second readings and Public Hearing.**

#### Approval

- Revise OCP Bylaw as necessary in consultation with staff;

**Deliverable: Final revisions to OCP Bylaw**

#### **D. Information available to the Consultant**

The Village will make available all current maps, plans, reports and bylaws via the Village's website.

#### **E. Budget**

The total budget for this project is not to exceed **\$42,000, including all eligible taxes, expenses, disbursements and contingencies**. Terms and timelines for payment will be negotiated in the contract for services and be based on the receipt of written invoices from the Consultant for services completed.

#### **F. Proposal Response Guidelines**

To ensure a proposal is considered for evaluation it should include all the information requested and be presented in the order described below:

##### Cover Letter

A cover letter dated and signed by a person authorized to negotiate and make commitments with respect to the proposal on behalf of the bidding Consultant or firm. Provide a statement indicating your company's understanding of the project and the deliverables required.

##### Proposed Project Plan

A proposed project plan, with timelines, following the general description of work outlined in Section C of this Request for Proposals, and providing additional details as appropriate.

##### Innovation

Provide details of any innovative ideas, suggestions, improvements, recommendations or opportunities for improvement that would enhance the project, processes or required outcomes outlined in this RFP.



### Project Team

Identify the lead consultant and provide a breakdown of qualifications and roles for each member of the team including:

- Name
- Role
- Responsibility
- Location
- Estimated time to be dedicated to the project (%)
- Resume(s) (in Appendix) showing;
  - o Education
  - o Professional certifications
  - o Length and types of relevant experience

### References

Please supply three client references for your company or lead consultant and sub-consultants, if applicable, including the name and address of the reference and the name, title and contact number of the contact person. Describe the services provided and how they are similar to this project. Include a short case study of the project for each of these references.

### Costs and Charges

Provide an all-inclusive fixed cost quotation in Canadian funds for the project. Identify the expected costs and cost breakdown, including meetings, graphics and mapping, professional fees, travel, sub-contracted services, contingencies and applicable taxes.

### **G. Review Schedule**

Last Day for Written Questions: Wednesday, September 4, 2019

Closing Date: Monday, September 9, 2019

Proposal Award: Monday, September 16, 2019

These dates are subject to change based on Village scheduling.

### **H. Inquiries**

Inquiries, requests for interpretation and questions regarding this RFP are to be directed to Larry Plotnikoff in writing at [cao@montrose.ca](mailto:cao@montrose.ca)

Q & A will be posted by email. Verbal questions may be asked at any time during regular business hours, but verbal responses are not binding on either party.



## I. RFP Evaluation Process

Evaluation Criteria	Max. Points	Rank	Comments
Price	15		
Proposed Project Plan <ul style="list-style-type: none"> <li>• Work Plan or Methodology;</li> <li>• Time Schedule for Completion of each component of the work;</li> <li>• Appropriate level of effort to ensure practical and cost-effective recommendations;</li> </ul>	30		
Innovation <ul style="list-style-type: none"> <li>• Innovative procedures, engagement methods and/or documentation output presented in the Proposal;</li> </ul>	10		
Project Resources <ul style="list-style-type: none"> <li>• Consultant's experience in similar work;</li> <li>• Quality of Consultant's interdisciplinary team members;</li> <li>• Past ability to meet schedules with required deliverables and positive outcomes;</li> <li>• Past experience with public consultation and engagement;</li> <li>• Knowledge of the area</li> </ul>	40		
Other <ul style="list-style-type: none"> <li>• Completeness and thoroughness of Proposal submitted</li> </ul>	5		
Total	100		



## **J. Mandatory Criteria**

In addition to the criteria listed in Section G and above, the following criteria are mandatory:

- Detailed project description including the approach and timeline
- The proposal must be received at the closing location before the specified time in the required format
- The proposal must be in English and must be sent by mail, courier or hand delivered. Proposals must not be sent by email
- Three (3) hard copies of the proposal and One (1) electronic version (pdf) on CD or USB must be submitted
- A cover letter must accompany the proposal
- The proposal must include a price breakdown and an outline of the qualifications, experience and knowledge as specified
- The proposal must confirm the ability of the Consultant to undertake the work
- The proposal must include proof of current professional liability coverage
- The proposal must include a statement that the Consultant is an independent contractor and operates as a valid business registered in the Province of BC
- The successful consultant will be required to hold a Village business licence

## **K. Selection of Successful Consultant**

A selection committee will evaluate proposals based on the Consultant's qualifications, knowledge, related experience, overall strength of proposal and proposed remuneration.

Consultants and their sub-consultants may be required to participate in an interview prior to award of contract. The Village of Montrose reserves the right to reject any or all proposals and to accept the proposal deemed most advantageous to the interests of the Village of Montrose.

## **L. Contract Negotiation**

The Village of Montrose will negotiate a contractual agreement with the preferred Consultant. If the Village of Montrose is unable to negotiate an acceptable contractual arrangement with the preferred Consultant, then the second preferred Consultant may be selected, and a contractual agreement negotiated and entered into. The Village of Montrose at any time, and without liability, may withdraw from negotiations with any potential Consultant.

## **M. Terms and Conditions of this Request for Proposals**

The following Village of Montrose standard terms and conditions are applicable as noted:

1. Sealed proposals, identified on the outside of the envelope with the words "Request for Proposals - Official Community Plan Review" will be received at the Village of Montrose Office, located at 565 11th Avenue, Montrose, BC, or by mail at PO Box 510, Montrose BC V0G 1P0.
2. Proposals must be received at the above location no later than 4.00 pm local time, September 9, 2019. Absolutely no submissions will be accepted after this time and date.





3. The Village of Montrose will not be responsible for any costs incurred by a Consultant in preparing and submitting proposals and/or attending interviews. The Village of Montrose accepts no liability of any kind to a prior to the signing of a contract.
4. Submission of a proposal shall not obligate, nor should it be construed as obligating the Village of Montrose to accept any such proposal or to proceed further with the project. The Village of Montrose may, in its discretion, elect not to proceed with the project, and may elect not to accept any or all proposals for any reason or may accept or reject, in whole or in part, any or all proposals.
5. At all times, the Consultant has the responsibility to notify the Village of Montrose, in writing, of any ambiguity, divergence, error, omission, oversight or contradiction contained within the proposal as it is discovered.
6. Written addenda posted on the Village's official website will be the only means of varying, clarifying or otherwise changing any of the information contained in this RFP. Addenda will state any changes to the RFP, closing date and time.
7. Proposals submitted shall be final and may not be altered by subsequent offerings, discussions, or commitments unless the Consultant is requested to do so by the Village of Montrose.
8. The Village of Montrose is subject to the British Columbia Freedom of Information and Protection of Privacy Act, and as such, any reports or documents produced on behalf of the Village are subject to review under the Act.
9. The Consultant must identify any information in its proposal that it considers to be confidential or proprietary.
10. There will not be a public opening. All proposals and accompanying documentation received under this competition will become the property of the Village of Montrose and will not be returned.
11. Prices quoted are to be held firm for a minimum of 90 days following the RFP closing date and shall remain in effect through the duration of an agreement.
12. The Consultant's proposal shall form part of the contractual agreement by attachment and will be incorporated by reference. Claims made in the proposal shall constitute actual warranties. Any provision in the proposal may be included in the contractual agreement as direct provision thereof.



13. The Consultant agrees to obtain and maintain all professional certifications and licenses necessary to lawfully provide the services required under this request for proposals.

14. For additional information or clarification contact:

Larry Plotnikoff, Chief Administrative Officer

Village of Montrose, BC

250-367-7234

[cao@montrose.ca](mailto:cao@montrose.ca)