



COLUMBIA SHUSWAP REGIONAL DISTRICT

REQUEST FOR PROPOSALS

SHUSWAP ECONOMIC DEVELOPMENT STRATEGY

The Columbia Shuswap Regional District is issuing this Request for Proposals (RFP) to invite qualified consultants to develop an economic development strategy for the Shuswap Economic Development department. The Shuswap Economic Development Strategy geographic area will include the communities of Sicamous, CSRD Electoral Area C (South Shuswap), CSRD Electoral Area D (Deep Creek/Salmon Valley/Falkland), CSRD Electoral Area E (Malakwa/Swansea Point), and CSRD Electoral Area F (North Shuswap). This project has been identified as one of the top priorities in the 2017 work plan for Shuswap Economic Development. Shuswap Economic Development has successfully worked to develop the Shuswap Tourism Development Plan and the Shuswap Agriculture Strategy and it is now time to develop an overall regional economic development strategy that will be able to identify other opportunities for the Shuswap region. This strategy will guide the Shuswap Economic Development department initiatives over the next three to five years.

Proposals clearly marked **“Proposal – Shuswap Economic Development Strategy”** will be accepted until **4 PM** local time on **Friday, April 7, 2017** at the office of the Columbia Shuswap Regional District, 555 Harbourfront Drive NE, P.O. Box 978, Salmon Arm, BC, V1E 4P1, or by electronic submission via email in PDF format to: rcyr@csrd.bc.ca.

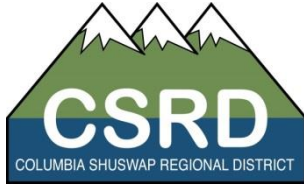
Proposal documents and further information are available online at the Columbia Shuswap Regional District website at <http://www.csrd.bc.ca/news-notice/opportunities/tenders>, and at the office of the Columbia Shuswap Regional District at the above address during regular office hours.

The Columbia Shuswap Regional District reserves the right to accept or reject any or all Proposals and to waive any informality in the Proposals received, in each case without giving any notice. The Columbia Shuswap Regional District reserves the right to accept the Proposal which it deems most advantageous.

Faxed or emailed submissions will be accepted.

The lowest of any Proposal not necessarily accepted.

For more information, please contact:
Robyn Cyr, Economic Development Officer
T: 250.833.5928 or TF: 1.888.248.2773
E: rcyr@csrd.bc.ca



COLUMBIA SHUSWAP REGIONAL DISTRICT

REQUEST FOR PROPOSALS

Development of an Economic Development Strategy for Shuswap Economic Development

March 22, 2017

Columbia Shuswap Regional District
555 Harbourfront Drive NE
Box 978 SALMON ARM BC V1E 4P1
T: 250.832.8194 TF: 1.888.248.2773 F: 250.832.1083
www.csr.bc.ca



General Scope of Services

The Columbia Shuswap Regional District (Regional District) is issuing this Request for Proposals (RFP) to invite qualified consulting firms with at least three years' experience as a consultant to develop the Shuswap Economic Development Strategy. The consultant must have experience in developing economic development strategies for local government or economic development organizations, preferably in rural communities.

The Shuswap Economic Development Strategy geographic area will include the communities of Sicamous, CSRD Electoral Area C (South Shuswap), CSRD Electoral Area D (Deep Creek/Salmon Valley/Falkland), CSRD Electoral Area E (Malakwa/Swansea Point), and CSRD Electoral Area F (North Shuswap). This project has been identified as one of the top priorities in the 2017 work plan for Shuswap Economic Development. Shuswap Economic Development has successfully worked to develop the Shuswap Tourism Development Plan and the Shuswap Agriculture Strategy and it is now time to develop an overall regional economic development strategy that will be able to identify other opportunities for the Shuswap region. This strategy will guide the Shuswap Economic Development department initiatives over the next three to five years.

1. INTRODUCTION

1.1 Form of Contract

The successful Proponent will enter into a form of contract for the delivery of the services based on the Proponent's proposal, the terms within this RFP and negotiations with the Preferred Proponent and the Regional District.

1.2 Definitions

In this RFP the following definitions shall apply:

“Closing Time” has the meaning set out in Section 2.1;

“Contract” means a formal written contract between the Regional District and a Preferred Proponent to undertake the Services;

“Office” means the office of the Columbia Shuswap Regional District located at 555 Harbourfront Drive NE, Box 978, Salmon Arm, BC V1E 4P1;

“Preferred Proponent(s)” means the Proponent(s) selected by the Regional District to enter into negotiations for a Contract;

“Proponent” means an entity that submits a Proposal;

“Proposal” means a proposal submitted in response to this RFP;

“RFP” means this Request for Proposal.



2. INSTRUCTIONS TO PROPONENTS

2.1 Closing Time and Address for Proposal Delivery

Proposals must be received:

(a) at the office of:

Columbia Shuswap Regional District
Attention: Robyn Cyr,
Economic Development Officer
555 Harbourfront Drive NE,
PO Box 978
Salmon Arm, BC V1E 4P1

(b) or electronic submission via email in PDF format to:

rcyr@csrd.bc.ca

(c) on or before the following date and time (the “Closing Time”):

Time: 4 PM local time
Date: Friday, April 7, 2017

It is the Proponent’s sole responsibility to ensure its Proposal is received at the address set out above by the Closing Time.

Proposals will be opened in private by the Regional District after the Closing Time.

2.2 Number of Copies

Proposals submitted by mail should include the original plus two hard copies (three in total).

2.3 Late Proposals

Proposals received after the Closing Time will not be accepted or considered and will be returned upon the Proponent’s request and at the Proponent’s expense.

2.4 Amendments to Proposals

Proposals may be revised by written amendment, delivered to the location set out above, or submitted electronically via email in PDF format, at any time before the Closing Time but not after.

2.5 Inquiries

All inquiries related to this RFP should be directed by email to the person named in this document (the “**Regional District Representative**”):

Robyn Cyr
Economic Development Officer,
Columbia Shuswap Regional District
Email: rcyr@csrd.bc.ca

Information obtained from any person or source other than the Regional District Representative may not be relied upon.

Inquiries should be made no later than three days before Closing Time. The Regional District reserves the right not to respond to inquiries made within three days of the Closing Time. Inquiries and responses will be recorded and may be distributed to all Proponents at the discretion of the Regional District.

Proponents finding discrepancies or omissions in the RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the Regional District Representative. If the Regional District determines that an amendment is required to this RFP, the Regional District Representative will issue an addendum in accordance with Section 2.6. **No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.**

2.6 Addenda

If the Regional District determines that an amendment is required to this RFP, the Regional District will post a written addendum on the Regional District’s website at www.csrd.bc.ca that will form part of this RFP. No amendment of any kind to this RFP is effective unless it is posted in a formal written addendum on the Regional District’s website. Upon submitting a Proposal, Proponents will be deemed to have received notice of all addenda that are posted on the Regional District’s website.

2.7 Examination of Documents

Proponents will be deemed to have carefully examined the RFP, including all attached Schedules and all relevant documents, prior to preparing and submitting a Proposal with respect to any and all facts which may influence a Proposal.

2.8 Project Time Frame

The budget for this project is \$50,000.00. This budget includes all aspects relating to the establishment of the economic development strategy which includes research, committee meetings, community consultation, and reporting to the CSRD Economic Development Advisory Committee regularly on the progress of the economic development strategy. All work completed has to be within this budgeted amount.

The target completion of the strategy is **November 30, 2017**.

The Regional District will require five copies of the draft final report and five copies of the final report.

3. PROPOSAL SUBMISSION FORM AND CONTENTS

3.1 Package

Proposals must be submitted in the Proposal Format as outlined in Schedule 'B', Proposal Submission Format. Hard copy submissions should be submitted in a sealed package, marked on the outside with the Proponent's name and title of the project.

3.2 Form of Proposal

The Regional District reserves the right to waive informalities in proposals, reject any or all proposals or accept the proposal deemed most favorable in the interests of the Regional District. Furthermore, the Regional District reserves the right to negotiate with any proponent at its discretion. The Proponents will be competent and capable of performing the work. The Proponent may be required to provide evidence of previous experience and financial responsibility before a contract is awarded.

3.3 Signature

The proposal should be signed by a person authorized to sign on behalf of the Proponent and include the following:

- (a)** If the Proponent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Proposal should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Proposal on behalf of the corporation is submitted;
- (b)** If the Proponent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venture should sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the Regional District that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venture is a corporation then such corporation should sign as indicated in subsection (a) above; or
- (c)** If the Proponent is an individual, including a sole proprietorship, the name of the individual should be included.

4. EVALUATION AND SELECTION

4.1 Evaluation

The Regional District will evaluate the Proposals by applying the evaluation criteria as described in Section 4.2 to identify the Proponent that the Regional District determines is the most advantageous to the Regional District.

The criteria will be applied without priority or weighting established in advance of the evaluation, and in particular, the Proponent whose Proposal has the lowest price will not necessarily be selected as the Preferred Proponent. The Regional District will apply the criteria evenly and fairly to all Proposals.

4.2 Evaluation Criteria

The Regional District will compare and evaluate all Proposals to determine the Proponent's strength and ability to provide the Services in order to determine the Proposal which is most advantageous to the Regional District, using the following criteria:

(a) Experience

The Proponent will have at least three years' experience as a consultant in the business of developing economic development strategies specifically for rural communities, and experience working with local governments, committees, community stakeholders, and residents.

(b) Reputation and Resources

Proponents will provide complete information on experience of key personnel to be involved in the project and references from work on similar projects. The Proponent must include a minimum of three references complete with contact information in the proposal for projects similar to the project described herein. Proponents will submit evidence of previous successful performance in comparable work. A brief description of the projects completed with each reference should be provided.

(c) Work Plan, Methodology and Schedule

The Regional District will consider the Proponent's proposed work plan, methodology and schedule as indicated in the Proposal. Proponents are encouraged to identify innovations that would maximize the efficiency and economics of the proposed work.

(d) Financial

The Regional District will consider the Proponent's pricing to deliver the objectives as indicated in the Proposal.

4.3 Additional Information

The Regional District may, at its discretion, request clarifications or additional information from a Proponent with respect to any Proposal, and the Regional District may make such requests to only selected Proponents. The Regional District may consider such clarifications or additional information in evaluating a Proposal.

4.4 Waiver of Deficiencies

If a Proposal does not satisfy every Regional District request or requirement as described in this RFP, the Regional District may, in its sole discretion, waive such deficiency and consider such Proposal in the evaluation of Proposals.

4.5 Selection of Proponent

The Regional District will select the Proponent which it determines is the most advantageous to the Regional District based on the Evaluation Criteria set out in Section 4.2 above. The Regional District is not bound to accept the lowest priced Proposal. The Regional District reserves the right to accept or reject any Proposal in whole or in part.



4.6 Good Faith Negotiations

By submission of its Proposal, the Proponent agrees that if at any time in the 60 days from the Closing Time it is selected by the Regional District to enter into negotiations for a Contract, the Proponent will, in good faith, participate in negotiations with the Regional District and use reasonable commercial efforts to reach agreement and finalize a Contract with the Regional District based on the Proponent's Proposal.

4.7 Negotiation of Contract and Award

If the Regional District selects a Preferred Proponent or Preferred Proponents, then it may:

- (a) Enter into a Contract with the Preferred Proponent(s); or
- (b) Enter into discussions with the Preferred Proponent(s) to clarify any outstanding issues and attempt to finalize the terms of the Contract(s), including financial terms. If discussions are successful, the Regional District and the Preferred Proponent(s) will finalize the Contract(s); or
- (c) If at any time the Regional District reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached within a reasonable time, give the Preferred Proponent(s) written notice to terminate discussions, in which event the Regional District may then either open discussions with another Proponent or terminate this RFP and retain or obtain the services in some other manner.

5. GENERAL CONDITIONS

5.1 No Regional District Obligation

This RFP is not a tender and does not commit the Regional District in any way to select a Preferred Proponent, or to proceed to negotiations for a Contract, or to award any Contract, and the Regional District reserves the right in its sole discretion to at any time reject all Proposals, and to terminate this RFP process.

5.2 Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing, and submitting Proposals, and for any meetings, negotiations or discussions with the Regional District relating to or arising from this RFP. The Regional District and its representatives, agents, consultants and advisors will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP.

5.3 No Contract

By Submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFP, prior to the signing of a formal written Contract.



5.4 Conflict of Interest

A Proponent shall disclose in its Proposal any actual or potential conflicts of interest and existing business relationships it may have with the Regional District, its elected or appointed officials or employees. The Regional District may rely on such disclosure.

5.5 Confidentiality

All submissions become the property of the Regional District and will not be returned to the Proponent. All submissions will be held in confidence by the Regional District unless otherwise required by law. Proponents should be aware the Regional District is a “public body” defined by and subject to the Freedom of Information and Protection of Privacy Act of British Columbia.

5.6 Insurance

The successful Proponent will, in the event of award, be required to provide to the Regional District, within ten (10) days of award:

- (a) Proof of public liability insurance for injury, property damage or death arising from the Proponent’s operations under the agreement in an amount not less than **THREE MILLION (\$3,000,000) DOLLARS** naming the Columbia Shuswap Regional District as additional named insured;
- (b) Proof of professional liability insurance in an amount of not less than **FIVE HUNDRED THOUSAND (\$500,000) DOLLARS**; and
- (c) Proof of registration with WorkSafeBC.

SCHEDULE 'A'

SHUSWAP ECONOMIC DEVELOPMENT – ECONOMIC DEVELOPMENT STRATEGY

TERMS OF REFERENCE

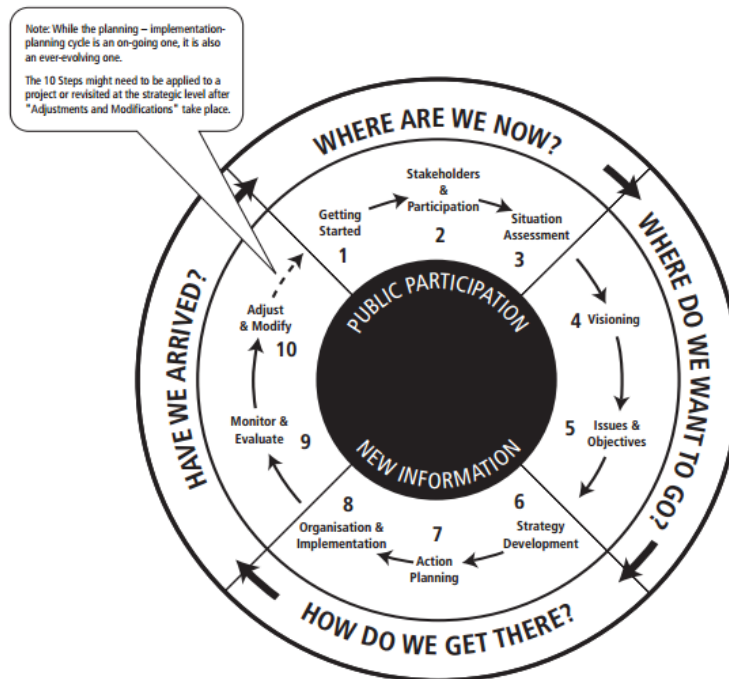
BACKGROUND AND INTRODUCTION

Strategic planning for community economic development activities creates opportunities for engagement and collaboration, and helps to build consensus among board members, stakeholders, and the community as a whole – creating shared goals and a common vision for the future.

Strategic planning provides structure for action: a way to establish priorities, make wise choices and allocate scarce resources (e.g., time, money, skills) to achieve agreed-upon objectives. Your strategic planning should address four basic questions:

1. Where are we now?
2. Where do we want to go?
3. How are we going to get there?
4. How do we know when we have arrived?

Answering each of these questions involve a number of steps that takes you through the strategic planning process. This process is illustrated below:



OBJECTIVES

The Shuswap Economic Development department of the CSR is interested in understanding the process, or framework, for undertaking the preparation of an Economic Development Strategy to guide economic development activities and programs over the next 3-5 years.

The intent of the resulting strategy document will create both general objectives and strategies, as well as a set of clear actionable projects or initiatives that will be implemented by the Shuswap Economic Development department.

OUTLINE OF REQUIRED STEPS:

1. Review of existing work done to date, for example:
 - a. Shuswap Agriculture Strategy
 - b. Business Retention and Expansion Program research
 - c. Shuswap Tourism Development Plan
 - d. Related documents, reports, studies prepared by other organizations, agencies within the CSR
2. Facilitated discussion/session with Committee to determine:
 - a. What constitutes economic development
 - b. The strategic planning process
 - c. Economic Development programs
 - d. What would best measure progress towards economic development
3. Review and assessment of current conditions in region and sub-regions (demographic and economic data) – development of sub-region profiles
4. Review and determine current economic sector strengths
5. Review and determine growth potential of current sectors
6. Review regulatory barriers
7. Community/Public consultation and engagement process (encompassing all communities and rural areas)
 - a. on-line survey(s)
 - b. community focus groups
 - c. one-on-one stakeholder interviews
 - d. youth engagement
8. Determine emphasis on business retention and expansion
9. Determine emphasis on business attraction
10. Develop initial objectives, strategy, and tactics with priority and geo-regions. Include performance measures and outcomes
11. Refine draft document in conjunction with Committee
12. Define and include first year implementation plan (matrix) into final document including:
 - a. activity
 - b. organization/role/responsibility
 - c. timeline
 - d. potential partners
 - e. budget



13. Release for public review (optional)
14. Refine final document and prepare for Committee approval
15. Presentation to Committee and other key stakeholders

Strategic Planning Timeframes and Budget

The importance of the strategic planning process should not be underestimated. The final document is meant to guide the community with their economic development activities over the next three to five years. It is recommended that a strategic planning process take place over six months.

SCHEDULE 'B'

PROPOSAL SUBMISSION FORMAT

All Proposals must follow the format outline below, and all of the requested information must be provided to the Regional District.

Cover Letter and Executive Summary

- (a) The cover letter will reference the RFP title and should clearly state the Proponent's understanding of the services to be provided. The letter should include the name(s) of the person(s) who will be authorized to make representations for the Proponent, their title(s) and contact number(s) and email address. The cover letter should be signed by an authorized signatory in a position to legally bind the Proponent to statements made in response to this RFP.
- (b) The executive summary should provide a synopsis of the overall approach and key points in the Proposal.

Table of Contents

The Table of Contents should reference the applicable section, subsection and page numbers. Pages should be consecutively numbered.

Experience, Reputation and Resources

Provide sufficient information, as outlined in the requirements section of the Terms of Reference, which demonstrates the Proponent's experience, reputation, capacity and availability of resources, including the ability to meet requirements of this RFP.

Also include how you will:

Provide sufficient information about the Proponent that includes but is not limited to:

- Contact information including name, title, address, email and contact numbers;
- Location of head office and subsidiary offices (if applicable);
- Number of employees (if applicable);
- Project Team Leader;
- Detailed information of the Proponent's years of relevant experience in providing the services required by this RFP; and
- Detailed information of the Project Team Leader's years of relevant experience in providing the services required by this RFP.

REQUIREMENTS TO BE INCLUDED IN THE PROPOSAL

Strategic Consulting

- Explain your understanding and views on Community Economic Development.
- Describe the role of an economic development organization in local government.
- How do you maximize the impact of an economic development organization in a community?
- What is your strategy development process?

Consulting Services

- Describe how you lead strategy development to gain consensus among diverse stakeholder needs and any relevant experience in economic development.
- Describe your team's experience with educating and training economic development staff and their stakeholders.

Experience

- Demonstrate your team's experience in working with economic development organizations.
- Explain your understanding of the political and stakeholder environment in the economic development environment.

Administrative

- Provide 3 client references.
- Describe any relevant relationships with partners that might be relevant to our organization.
- Provide your rate card. Describe how you approach scoping and delivery of ongoing services to ensure cost effectiveness.

Proponents may use this section to provide any additional comments about their experience and capacity which may be informative and beneficial to the Regional District.

Work Plan, Methodology and Schedule

Proponents must provide a timetable, milestones, meetings and detailed work plan for the project, including timelines for completion of specific tasks (by individual), time requirements and identification of specific deliverables. A methodology outline should describe the key elements of the approach that would be used by the Proponent.

Fees

Proponents must provide a schedule of hourly rates for all personnel who might be used on the project and a table summarizing the total estimated cost of the project with the hourly rates and the total hours anticipated. A schedule and a total fee to complete the project including expenses and disbursements is also required. If optional tasks are proposed, a separate cost for those tasks should be noted.