



LADYSMITH

Development Services

Request for Proposals

No. 2020-DS-01

**Town of Ladysmith OCP Review: Planning
Services**

For further information
please contact:

Jake Belobaba
**Director of Development
Services**
250.616.3755
jbelobaba@ladysmith.ca

RFP Issue Date: **November 18, 2020**
RFP Closing Date: **January 15, 2021 at 2:00 pm PST**
RFP Opening Date: **January 15, 2021 at 2:15 pm PST**



LADYSMITH

1. Introduction

The Town of Ladysmith is seeking a qualified planning firm to lead a review of the Town’s Official Community Plan (OCP). Specifically, the successful proponent will design and execute a successful public engagement, analysis and OCP drafting process (referred to hereafter as the “Proposed Services”) by building on previously completed plans and studies. A folder of these materials is available at <https://www.ladysmith.ca/city-hall/bid-opportunities>. The successful proponent must be available to start the OCP process by February 3, 2021. The project timeline must not exceed 21 months from the project start date to adoption of the OCP. The Town’s total budget for the Proposed Services is \$200, 000.

2. Project Deliverables and Requirements

The table below provides a breakdown of in-scope and out-of-scope tasks for the Proposed Services. The consultant will be responsible for all aspects of process design and execution, communications, stakeholder mapping, content and bylaw drafting. The Town will retain responsibility for legal review and project oversight.

	In Scope (Consultant)	Out of Scope (Town or third party)
Process delivery	<ul style="list-style-type: none"> • Process design. • Regular modifications and updates to the Project Charter. • Engagement strategy. • Analysis and background research. • Progress updates summary reports and similar deliverables. • Engagement deliverables (e.g. maps, storyboards, interactive displays etc.). • Stakeholder mapping. • Facilitation of engagement events. • Facilitation of intergovernmental meetings and workshops as required. 	<ul style="list-style-type: none"> • Steering committee design and selection
Communications	<ul style="list-style-type: none"> • Communication deliverables, including newspaper advertising, social media posts and other outreach methods. • Drafting intergovernmental referrals. • Presentations to Council/Steering Committee as required. 	<ul style="list-style-type: none"> • Communications deliverables will be reviewed and executed by the Town’s Communications Specialist. • Newspaper advertising. • Posting on Town webpages and social media. • Delivery of statutory notifications and consultation (i.e. s. 475-477 of the <i>Local Government Act</i>).
OCP Content & Adoption	<ul style="list-style-type: none"> • Drafts and revisions of OCP bylaw and schedules. • GIS files for all OCP maps (ArcGIS pro map package and file geodatabase). • Word and PDF versions of all OCP drafts. 	<ul style="list-style-type: none"> • Staff reports to Council. • Legal advice and reviews.
Housekeeping & Incidentals	<ul style="list-style-type: none"> • Stationery and portable equipment for engagement events (e.g. easels, 	<ul style="list-style-type: none"> • COVID-19 safety items (masks, hand sanitizer, etc.). • Venue booking.

	display panels, markers trace paper etc.). <ul style="list-style-type: none">• Travel, meals and staff incidentals.• Vehicle transportation within Ladysmith e.g. car rental.	
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3. Response Content

All respondents should include the following information in their proposal:

- A list of team members with a description of their qualifications (max 200 words/team member). The project team must include at least one Certified Member of the Planning Institute of BC, and a GIS specialist. Each proposal must list hourly rates for each team member.
- Detailed project budget broken down by project phase. At minimum, the budget must include: staff time, total number of hours per team member, travel and meals, incidentals, disbursements and administration fees. Proponents should also highlight services not included in their proposal that are available on an on-call, added-cost basis (e.g. specialists, or special services) and the cost for such services.
- Proposed process. Each proponent must outline an adaptable, phased, engagement and OCP development process. The process must specify deliverables, engagement strategies, and a timeframe for each phase.
- Updated Project Charter. Proponents must provide an updated Project Charter based on their proposed process and engagement strategy. A word version of the current Project Charter is available in the folder of background materials at <https://www.ladysmith.ca/city-hall/bid-opportunities>.
- Comparable Experience. Proposals should describe comparable planning projects completed by the proponent. At least one example must be an OCP process led by the proponent for a municipality in BC that resulted in an adopted OCP. The proponent must provide a detailed breakdown of the role the proponent played in the project (i.e. what tasks the proponent led/undertook and what tasks the client or a third party completed).
- Portfolio. Proponents must provide a portfolio highlighting their breadth, innovation and subspecialties in developing media and engagement techniques (e.g. print, web, 3D, maps, data analytics, digital dashboards, illustrations, workshop techniques etc.).
- A summary of technological proficiencies and capabilities.
- A COVID-19 mitigation and adaptation strategy that demonstrates how the process minimizes risks to stakeholders and a successful process due to COVID-19.
- A minimum of three references.

Submissions shall not exceed 25 pages, including all appendices, tables, figures, cover pages table of contents and attachments. The proposal may contain links to web content, such as online employee or company profiles, digital portfolios or examples of comparable planning projects.

4. Inquiries, Notification and Status

All inquiries related to this “Request for Proposal” must be submitted by email, to Jake Belobaba, Director of Development Services at jbelobaba@ladysmith.ca with the subject line: ‘Inquiry RFP 2020 DS-01’.

Only the successful proponent will be notified of the Town’s decision to award this RFP. The Town will not respond to inquiries related as to the status of the RFP before the contract is awarded. The status (i.e. open, closed, awarded) of this RFP will be posted on the Town’s webpage. After the RFP is awarded, proponents may request a debrief of their application by email as described above.

5. RFP Addenda and FAQ’s

It is the responsibility of the proponents to check periodically for any addenda that may be issued by the Town of Ladysmith. Addenda will be posted on the Town of Ladysmith website (www.ladysmith.ca/city-hall/bid-opportunities) and on BC Bid. Similarly, FAQ’s will be posted on the Town’s webpage and proponents should check this webpage frequently for information.

6. Proposal Submission

Proponents must submit their proposals by email no later than 2:00pm on January 15, 2021 to the attention of:

Donna Smith, Manager of Corporate Services
Town of Ladysmith
410 Esplanade, P.O. Box 220
Ladysmith, BC V9G 1A2
Email: bid@ladysmith.ca

Proposals must be submitted by email. The Town cannot receive emails in excess of 25 megabytes in size and therefore all proposals must be less than 25 megabytes. The Town is not responsible for the timely receipt or adequacy of any electronic transmissions, and late receipt of Proposals via email will be cause for rejection of a Proposal.

All submissions must be clearly marked “Request for Proposals No. 2020-DS-01”.

The successful bidder will be required to obtain and provide proof of the following:

- A current business license for operating in the Town of Ladysmith.
- A Clearance Letter from WorkSafe BC that confirms they are registered and in good financial standing with WorkSafe BC.
- Minimum \$2 million liability insurance with the Town of Ladysmith named as additional insured.
- Federal, provincial and municipal permits when and where applicable.

Submissions in response to this RFP will be opened at the Town of Ladysmith City Hall on Friday, **January 15, 2021 at 2:15pm. This is not a public opening.**

8. Proposal Evaluation

Town staff, Council and the OCP Steering Committee, will review proposals. During the evaluation process, any or all of the proponents may be contacted with questions about their proposal. Some proponents may be required to provide a presentation to the Town. The Council will decide on the successful proponent by resolution, pursuant to the Town’s Purchasing Policy.

The Town will evaluate proposals based upon but not limited to, the criteria noted below. Proposals that do not meet criteria listed as ‘mandatory’ will not be considered.

Criteria	Description	Weight
Budget and Hourly Rates		
Budget structure and content	Budgets must be broken down by phase and include: staff time, travel and meals, incidentals, total number of hours per team member, disbursements and administration fees.	Mandatory
Value	The budget should maximize value for the Town with the majority of costs allocated to engagement, analysis and content development. Preference will be given to proposals that: <ul style="list-style-type: none"> • Minimize incidental costs. • Include hourly rates consistent with industry rates. • Demonstrate efficiency and maximize value. • Provide sufficient detail and demonstrate understanding of all foreseeable expenses and costs. • Eliminate redundancies and unnecessary costs and utilize services that are cost effective. • Allocate work efficiently amongst team members to maximize value e.g. senior/junior team members, specialists, technicians etc. 	20%
On-call, added-cost services	Services that should be included in the proponent’s core proposal should not be offered as on-call, added-cost services. However, proponents highlight value-added services that are available. Such services should have costs consistent with industry rates and provide good value to the Town in the event these services are needed—i.e. as opposed to seeking a third party provider.	5%
Process Design and Schedule		
Consistency with IAP2 principles	The proposal must provide an engagement model and demonstrate how the engagement model is consistent with the IAP2 framework	Mandatory
Completion date	The proposed schedule must show an OCP adoption date no later than 21 months from the start of project.	
Schedule	The project schedule from start to adoption of the OCP should be between 18-21 months. The schedule must also be realistic and allocate time for legislated requirements (e.g. public hearings and intergovernmental referrals) as well as feedback processes with Council, the steering committee and stakeholders.	6%
Innovation and adaptability	The process design should demonstrate responsiveness to stakeholder feedback and be modifiable in response to evolving stakeholder expectations. The process should be innovative and relevant to the Town of Ladysmith.	6%
Concision and ease of understanding	The Project Charter will form the basis of the process design. The process design must be simple, concise and unified (i.e. a single document for stakeholders, the steering committee, Council, consultants and staff). The process should demonstrate a clear path	6%

	to consensus and eliminate redundancies, excessive reporting, and similar practices that reduce stakeholder motivation.	
COVID-19	Engagement methods must factor in COVID-19 safety precautions. Digital/online methods are expected but shall not be the sole method of public engagement.	Mandatory
Principles of Best Value		
	<p>The Town of Ladysmith Purchasing Policy entails the following Principles of “Best Value”:</p> <ul style="list-style-type: none"> • Procure the goods and services requirements of all departments in an efficient, timely and cost effective manner while maintaining the necessary controls; • Engage in an open bidding process wherever practical; • Ensure maximum value is obtained during the acquisition of goods and services. Where applicable, the total cost of the goods and services purchased should be taken into account. Total cost may include but not be limited to acquisition cost, disposal cost, residual value, training cost, maintenance cost, product performance and environmental impact; • Take into account wherever practical the commitment to protection of the environment, and energy conservation; • Ensure the acquisition of goods and services meets the requirements of applicable legislation and trade agreements, including the New West Partnership Trade Agreement, and the Agreement on Internal Trade; and • Ensure that maximum value is realized when disposing of surplus goods, materials and equipment. • Up to five (5) percent of the evaluation score will be allocated based on the proposal's contribution to the following community benefits: <ul style="list-style-type: none"> • <i>Economy</i> <ul style="list-style-type: none"> ○ Demonstrate job creation within the local area, which is defined as the Cowichan Valley Regional District and the Regional District of Nanaimo. ○ Contribute to a stronger local economy (buy local). ○ Increase training and apprenticeship opportunities. ○ Provide work experience and employment opportunities for youth aged 15 to 24. ○ Ensure that a Living Wage for the local area is paid. • <i>Public Spaces</i> <ul style="list-style-type: none"> ○ Enhance community recreation, arts and/or culture infrastructure. ○ Improve and enhance public spaces. ○ Improve access to public spaces for people living with disabilities. • <i>Environment</i> 	5%

	<ul style="list-style-type: none"> ○ Demonstrate that work undertaken exceeds requirements for environmental standards. 	
Project Team		
Required team Members	The team must have at least one Registered Professional Planner (RPP) listed on the Planning Institute of BC’s register of members and at least one GIS specialist with demonstrated proficiency, training and experience in GIS and mapping.	Mandatory
Team composition	Preference will be given to multidisciplinary project teams and firms with additional capacity/specialization that can be called on as needed (i.e. specialists that can be brought in if certain policy areas are explored).	17%
Comparable Project Experience		
Previous OCPs	Proponents must provide at least one example of an OCP process led by the proponent for a municipality in BC. The example must be an adopted OCP.	Mandatory
Comparable project experience: general	The proponent must provide examples of comparable planning projects. Proposals highlighting examples of: projects in BC, a strong First Nation focus or participation level, innovation and excellence in planning, and relevance to Ladysmith will be given preference. Examples should be limited to projects led by the proponent as opposed to a specialized or contributing role led by another firm or the client. Comparable experience should demonstrate the firm’s ability to accomplish the full breadth of OCP development (e.g. big picture aspects like visioning, engagement and “big ideas” but also the pragmatic aspects such as logistics, mapping, bylaw drafting and legislation compliance).	20%
Portfolio		
Innovation across medium and processes	The planning process requires meaningful and creative ways to engage (and maintain engagement) with stakeholders. The portfolio provides an opportunity for proponents to demonstrate their breadth, innovation and subspecialties in this area. Proponents should demonstrate unique skills using a variety of methods and media formats (e.g. print, web, 3D, maps, data analytics, architectural illustrations, storyboards etc.). Examples may include innovative digital or in-person engagement techniques, graphics or art, a digital dashboard, etc. Examples can be “high tech” or “low tech” and need not be limited to planning projects. Preference will be given to proposals that show innovation, creativity and responsiveness to challenges.	10%
Technological Capabilities and Proficiencies		
Minimum Capabilities	The successful proponent must have the following capabilities (i.e. appropriate hardware/software and proficiencies): <ul style="list-style-type: none"> • A secure, FOIPPA-compliant web-based file sharing service. • GIS services compatible with ArcGIS Pro¹. • AutoCAD². • Graphic design (e.g. Adobe Create Suite). • Advanced PDF editing (e.g. Acrobat DC or Adobe Creative Suite). 	Mandatory

¹ The Town is transitioning to an ArcGIS Pro (desktop configuration) platform for maintaining OCP and Zoning geographic data and is transitioning some engineering datasets to ArcGIS formats. However, the Town does not have dedicated GIS staff.

² Engineering generally relies on AutoCAD. Some data may be provided to the consultant in AutoCAD format.

	<ul style="list-style-type: none"> A digital meeting platform with audio, video, screen sharing, and participant interaction functions (e.g. Zoom, GoToMeeting etc.). 	
Preferred capabilities	The Town recognizes that, while not a substitute for traditional planning tools and in-person collaboration, the planning process continues to benefit from the use of digital tools and technology’s ability to bridge gaps during the COVID-19 pandemic. Proposals that demonstrate the proponent’s ability to provide relevant and appropriate value-added technology services such as data analytics, online engagement and modelling tools will be given preference.	5%
Total Score		100%

The Town reserves the right to accept or reject any or all proposals either completely or in part at any time, or waive formalities in, or accept a proposal completely or in part which is deemed most favorable in the interest of the Town. The Town will be under no obligation to proceed further with any submitted proposal and, should it decide to abandon the same, it may, at any time, invite further proposals for the supply of the described services or enter into any discussions or negotiations with any party for the provision of the services. No alterations, amendments or additional information will be accepted after the closing date and time unless invited by the Town.

The lowest or any submission in response to this RFP will not necessarily be accepted. The bids will be considered on their merits and it is not the intention of the Municipality to buy on price alone.

7. Ownership of Proposals

All Proposals and subsequent information materials shall become the property of the Town of Ladysmith after the closing date and time and will not be returned.

The Proposals will be held in confidence by the Town subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. This Request for Proposals and all associated documentation is the property of the Town of Ladysmith and shall not be copied or distributed without the prior written approval of the Town.