



COWICHAN VALLEY REGIONAL DISTRICT

Request for Proposals

For

Recreation Planning

Request for Proposals No.: R17-02

Issued: May 1, 2017

Submission Deadline: **May 23, 2017 @ 2:00 p.m. local time**

COWICHAN VALLEY REGIONAL DISTRICT
175 INGRAM STREET
DUNCAN, BRITISH COLUMBIA
V9L 1N8
www.cvrld.bc.ca

INTRODUCTION

Invitation

This Request for Proposals (the “RFP”) issued by The Cowichan Valley Regional District (“the CVRD”) is an invitation to prospective proponents to submit proposals for the provision of Recreation Planning, as further described in the RFP Particulars (Appendix A) (the “Deliverables”).

Submission Instructions

Proposals must be sent by email to the RFP Contact at the email address set out below.

Anthony Jeffery Email: ajeffer@cvrd.bc.ca

The complete proposal must be received in the inbox of the RFP Contact's email address by the Submission Deadline. Proposals received after the Submission Deadline will not be considered.

It is the intention of the CVRD to enter into a contract with one (1) legal entity for each phase of the two phases outlined. The same legal entity may be awarded both phases.

RFP Timetable

Event	Date
Release of RFP	Monday, May 1, 2017
Deadline for Questions	One week prior to closing
Submission Deadline	Not Later Than 2:00 p.m. local time Tuesday, May 23, 2017

The RFP timetable is tentative only, and may be changed by the CVRD at any time prior to the Submission Deadline.

Evaluations of Proposals

The CVRD will conduct the evaluation of Proposals in the following two stages:

Stage I – Mandatory Requirements

The mandatory requirements for this RFP are each quotation **must include** a Submission Form (Appendix B) completed and signed by an authorized representative of the respondent. Subject to the Terms of Reference and Governing Law (Appendix C), those Proposals that do not satisfy the mandatory requirements as of the Submission Deadline will be disqualified and will not be evaluated further.

Stage II – Rated Criteria

Stage II will consist of a scoring of Proposals on the basis of the following rated criteria:

The following is an overview of the categories and weighting for the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Rated Criteria Category	Weighting (Points)	Minimum Threshold
D.1 Experience and Qualifications	40	32
D.2 References	20	15
D.3 Pricing	40	N/A
Total Points	100	

D.1 Experience and Qualifications – Total Points = 40 points

Each proponent should provide the following in its proposal:

- (a) a brief description of the proponent;
- (b) a description of the goods and services the proponent has previously delivered and/or is currently delivering, with an emphasis on experience relevant to the Deliverables;
- (c) the roles and responsibilities of the proponent and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise;
- (d) a description of how the proponent will provide the Deliverables, which should include a work plan and incorporate an organizational chart indicating how the proponent intends to structure its working relationship with the CVRD.

D.2 References – Total Points = 20 points

Each proponent is requested to provide three (3) references from clients who have obtained goods or services similar to those requested in this RFP from the proponent in the last five years.

D.3 Pricing – Total Points = 40 points

Pricing will be scored based on a relative pricing formula. Each proponent will receive a percentage of the total possible points allocated to price relative to the lowest bid price, based on the following formula:

$$\text{lowest price} \div \text{proponent's price} \times \text{total available points} = \text{proponent's score}$$

A Detailed Work Schedule detailing the proponent's approach to the activities described in the Scope of Work and estimate the number of hours that each team member allotted to each task and provide a subtotal of hours for each task. Your pricing matrix should include hourly rates and subtotals for all listed tasks to the information provided in the scope of work. It should also be broken into the two phases.

Proponents shall provide a total, all-inclusive, price to complete this engagement, including fees, disbursements and expenses.

Selection of Top-Ranked Respondent

Subject to the Terms of Reference and Governing Law (Appendix C), the top-ranked respondent as established under the evaluation will be selected to enter into a contract for the provision of the Deliverables. The respondent selected pursuant to this RFP process will be informed in writing. Respondents not selected will also be informed in writing. The selected respondent will be expected to enter into a contract within the timeframe specified in the selection notice. Failure to do so may, among other things, result in the disqualification of the respondent and the selection of another respondent or the cancellation of the RFP.

APPENDIX A – RFP PARTICULARS

Introduction

The Cowichan Valley Regional District (CVRD) is examining the region's recreation services through four identified phases:

1. Initial public engagement
2. Collection of user data
3. Exploration of regional recreation options
4. Creation of a recreation master plan

With this request for proposals, the Cowichan Valley Regional District is seeking consulting firm(s) to supply a proposal for the initial public engagement phase, or the collection of user data phase, or both. A separate request for proposals is anticipated for the exploration of regional recreation options, and the creation of a recreation master plan, at a future date.

The initial public engagement phase is intended to determine what the public feels is important regarding today's recreation services, and the services needed for the future. More specifically,

- Needs, wants and satisfaction level with recreation opportunities currently
- Needs and wants for recreation opportunities in the future
- How and where the public recreates, and the importance of proximity of recreation opportunities to the respondent's residence
- A comparison of needs and wants for indoor versus outdoor spaces

Tools to be used would include surveys, social media, display boards, open houses, and the regional district's newest online platform, PlaceSpeak.

The collection of user data phase is intended to obtain a statistically valid sample of usage of the nine major recreation facilities in the Cowichan region, to identify the number and percentages of patrons from the following jurisdictions:

- Electoral areas A, B, C, D, E, F, G, H, I
- Town of Lake Cowichan
- Town of Ladysmith
- City of Duncan
- Municipality of North Cowichan
- Outside the Cowichan region.

The nine major recreation facilities include:

- Shawnigan Lake Community Centre
- Kerry Park Recreation Centre
- Island Savings Centre
- Cowichan Performing Arts Centre
- Cowichan Aquatic Centre
- Cowichan Sportsplex
- Cowichan Lake Sports Arena
- Fuller Lake Arena
- Frank Jameson Community Centre

The proponent would work with a regional recreation committee, and regional district and municipal staff.

Scope of Work

Initial Public Engagement

A general outline of the expected scope of work of the successful Proponent includes the following:

1. To establish a consultative process with the general public, regarding:
 - Needs, wants and satisfaction level with recreation opportunities currently
 - Needs and wants for recreation opportunities in the future
 - How and where the public recreates, and the importance of proximity of recreation opportunities to the respondent's residence
 - A comparison of needs and wants for indoor versus outdoor spaces
2. Create and print a FAQs document, to inform the public on the project, and opportunities for input.
3. Use the online platform PlaceSpeak to consult the public, with input to be provided through a poll and other site tools. Consultant to setup, maintain, and analyze input.
4. Use the CVRD website to inform the public on the project, and opportunities for input. Consultant to setup content, and maintain.
5. Use social media to inform the public and receive input.
6. Draft a news release to inform the public on the project, and opportunities for input.
7. Advertise in local newspaper (3 ads total) to inform the public on the project, and opportunities for input.
8. Draft and produce display boards to inform the public on the project, and opportunities for input. To be used at recreation facilities, community events, and open houses.
9. Analyze input collected from recreation facility displays (nine facilities for two days each), thirteen community events (one in each CVRD electoral area or incorporated area), and four sub-regional open houses.
10. Produce and manage a random- sample survey (s) in sufficient size to ensure accepted statistical standards of reliability and validity for our population of approximately 82,000 residents. In consultation with the CVRD, the Proponent shall be responsible for the production of the survey instrument, including layout, structure and wording of the questionnaire in order to elicit public response to current and future community recreation needs. The Proponent shall consolidate the data and formulate reports both in raw data form and summary report.
11. Determine facility deficiencies based on the existing inventory, community aspirations and projected population growth.
12. To detail the supply of facilities and programs in relation to demand and the extent to which current facilities are being used.

Recreation Facility use Analysis

A general outline of the expected scope of work of the successful Proponent includes the following:

1. To undertake an independent analysis of the geographic residency of the users of specific public recreation facilities that are supported by CVRD taxpayers
2. The report is to include, in percentage terms, a statistically reliable breakdown of users of regionally significant facilities by areas of residency, with a level of confidence averaging + / - 5% nineteen times out of twenty
3. The regionally significant facilities include:
 - Shawnigan Lake Community Centre
 - Kerry Park Recreation Centre
 - Island Savings Centre
 - Cowichan Performing Arts Centre
 - Cowichan Aquatic Centre
 - Cowichan Sportsplex
 - Cowichan Lake Sports Arena
 - Fuller Lake Arena
 - Frank Jameson Community Centre
4. The areas of residency will include four incorporated municipalities and nine electoral areas all within the Cowichan Valley Regional District, as well as the percentage of users that come from outside the regional district.
5. The user data to be analyzed as a geographic member of the CVRD (or “other” designation). These geographic areas consist of:
 - Electoral Area A – Mill Bay / Malahat
 - Electoral Area B – Shawnigan Lake
 - Electoral Area C – Cobble Hill
 - Electoral Area D – Cowichan Bay
 - Electoral Area E – Cowichan Station / Sahtlam / Glenora
 - Electoral Area F – Cowichan Lake South / Skutz Falls
 - Electoral Area G – Saltair / Gulf Islands
 - Electoral Area H – North Oyster / Diamond
 - Electoral Area I – Youbou / Meade Creek
 - City of Duncan
 - Municipality of North Cowichan
 - Town of Ladysmith
 - Town of Lake Cowichan
6. Typically, a recreation facility has three modes of use, namely:

- Drop in uses, where a patron makes a decision on a use-by-use basis to use the facility, and often pays a user fee to use a facility during a public use session
- Program uses, where a user typically pre-commits through a registration process, to a series of uses, usually involving some form of instruction, and then attends for most or all of those programmed uses
- Rental uses, where a group or individual rents a space or a portion of a space and then controls the uses and users of that rented space for the period of the rental.

Based on the three modes of use, it is anticipated that that three types of data will be collected using different techniques. Program registration residency information and rental use residency information will be provided to the consultant by the recreation facilities. Drop in use residency information will be solely the responsibility of the consultant to obtain.

Work Plan

The Proponent will outline an approach to the undertaking of the project reflecting a clear understanding of the objectives. If the proponent considers that the Terms of Reference should be expanded or reduced, the work plan will be based on the Terms of Reference with a provision for changes. The proposal will include a comprehensive methodology detailing the tasks required. The level of detail included in the work plan will convey to the Regional District that the Proponent has reviewed the project's scope and complexity and has a thorough understanding of the expectation for the project.

Budgeting & Phasing

The Proponent will be responsible for all costs but not limited to travel, accommodation, postage, word processing, mapping, photocopying, and telephone. Travel for the project is expected to be included:

1. Once selected the Proponent will be required to travel to the CVRD for initiation meetings with the committee. At this time survey questions will be approved.
2. Survey/questionnaire distribution
3. Public meetings / workshops / open houses.
4. Once survey/questionnaire data and meeting/workshop/open house information have been gathered and compiled the Proponent will be required to travel to the CVRD for a preliminary presentation to the committee.
5. Presentation of the final report to the committee.

CVRD staff will assist in gathering background information and arranging for contacts and interviews if assistance is required.

A budget of \$30,000 has been allocated for the initial public engagement phase.

A budget of \$40,000 has been allocated for the recreation facility use analysis phase.

4.0 REFERENCE MATERIAL

- 1) The CVRD will make the following information available to the selected Proponent for review:
 - a) Cowichan Valley Regional District 2011 Recreation Facility Use Analysis

APPENDIX B – SUBMISSION FORM

Respondent Information

Please fill out the following form and name one person, to be the contact for this RFP response and for any clarifications or amendments that might be necessary.	
Full Legal Name of Respondent:	
Any other relevant name under which the respondent carries on business is:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Fax Number:	
Company Website (if any):	
RFP Contact Person and Title:	
RFP Contact Phone:	
RFP Contact Facsimile:	
RFP Contact E-mail:	

Acknowledgement of Terms of Reference and Governing Law

The respondent acknowledges that this RFP process will be governed by the specific Terms of Reference and Governing Law set out in this RFP and that, among other things, the Terms of Reference and Governing Law confirm that this procurement process does not constitute a formal legally binding bidding process and that there will be no legal relationship or obligations created until the CVRD accepts the respondent's offer in writing.

Ability to Provide Deliverables

The respondent has carefully examined this RFP and has a clear and comprehensive knowledge of the Deliverables required. The respondent represents and warrants its ability to provide the Deliverables in accordance with the pricing set out below.

Non-Binding Pricing

The proponent has submitted its pricing in accordance with the instructions in the RFP. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

Respondents should provide pricing (in Canadian dollars) for the Deliverables described hereunder:

Addenda

The proponent is deemed to have read and taken into account all addenda issued by the Region prior to the Deadline for Issuing Addenda. The proponent is requested to confirm that it has received all addenda by listing the addenda numbers, or if no addenda were issued by writing the word "None", on the following line: _____ . If this section is not completed, the proponent will be deemed to have received all posted addenda.

No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this RFP.

Conflict of Interest

For the purposes of this RFP, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFP process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of the CVRD in the preparation of its proposal that is not available to other proponents, (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process), or (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the open and competitive RFP process or render that process non-competitive or unfair; or
- (b) in relation to the performance of its contractual obligations under a contract for the Deliverables, the proponent's other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

For the purposes of section (a)(i) above, proponents should disclose the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (a) participated in the preparation of the proposal; **AND** (b) were employees of the CVRD within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, the respondent will be deemed to declare that: (1) there was no Conflict of Interest in preparing its quotation; and (2) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

- ☐ The respondent declares that there is an actual or potential Conflict of Interest relating to the preparation of its quotation, and/or the respondent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the respondent declares an actual or potential Conflict of Interest by marking the box above, the respondent must state on a separate sheet details of the actual or potential Conflict of Interest.

Signature of Witness:

Name of Witness:

Signature of Respondent Representative:

Name and Title:

Date of Signature:
I have authority to bind the Respondent.

APPENDIX C - TERMS OF REFERENCE AND GOVERNING LAW

In responding to this RFP, each respondent must submit a completed and signed Submission Form (Appendix B) that, among other things, acknowledges its acceptance of the following RFP Terms of Reference and Governing Law:

- (a) This RFP process is not intended to create a formal, legally binding bidding process and shall not give rise to the legal rights or duties applied to a formal Contract A binding bidding process or any other legal obligations arising out of any tendering process contract or collateral contract, and instead shall be governed by the common law applicable to direct commercial negotiations.
- (b) No legal obligation regarding the procurement of any good or service shall be created until the CVRD and the selected respondent have entered into a written contract for the Deliverables.
- (c) Neither party shall have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract or a decision of the respondent to withdraw its quotation.
- (d) The CVRD may cancel this RFP process at any time.
- (e) Procurements falling within the scope of Chapter 5 of the Agreement on Internal Trade and/or the New West Partnership Trade Agreement are subject to those trade agreements but that the rights and obligations of the parties will be governed by the specific terms of this RFP.
- (f) The respondent consents to the collection and use by the CVRD of the information as contemplated under this RFP for the uses contemplated under this RFP.
- (g) The respondent will bear its own costs associated with, or incurred in, the preparation and presentation of its quotation, including, if applicable, costs incurred for interviews or demonstrations.
- (h) Respondents may direct questions or seek additional information in writing by e-mail to the RFP Contact on or before the Deadline for Questions. The CVRD is under no obligation to provide additional information but may do so at its sole discretion. It is the responsibility of the respondent to seek clarification from the RFP Contact on any matter it considers to be unclear. The CVRD is not responsible for any misunderstanding on the part of the respondent concerning this RFP or its process.
- (i) This RFP may be amended only by addendum issued in accordance with this section. If the CVRD, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all respondents by addendum. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Respondents are responsible for obtaining all addenda issued by the CVRD. In the Quotation Form (Appendix B), respondents should confirm their receipt of all addenda by setting out the number of each addendum in the space provided.
- (j) When evaluating Proposals, the CVRD may request further information from the respondents or third parties in order to verify, clarify or supplement the information provided in the respondent's quotation, and the CVRD may revisit and re-evaluate the respondent's quotation or ranking on the basis of any such information.
- (k) The CVRD may consider the respondent's past performance on previous contracts or any other information considered relevant by the CVRD when determining the acceptability of a respondent.
- (l) The CVRD may disqualify a respondent for any conduct, situation or circumstance that constitutes a Conflict of Interest, as solely determined by the CVRD. "Conflict of Interest" shall have the meaning ascribed to it in the Quotation Form (Appendix B).

- (m) Respondents shall not engage in any illegal business practices, including such activities as bid-rigging, price-fixing, bribery, fraud or collusion. Respondents shall not engage in any unethical conduct, including lobbying or other inappropriate communications; offering gifts to elected officials, employees, officers or other representatives of the CVRD; deceitfulness; submitting Proposals containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process.
- (n) The CVRD may elect not to consider a respondent who engages in conduct prohibited by this RFP or whose quotation contains misrepresentations or any other inaccurate, misleading or incomplete information.
- (o) The CVRD may prohibit a respondent from participating in a procurement process based on poor past performance or inappropriate conduct in a prior procurement process, including but not limited to (i) illegal and unethical conduct; (ii) the submission of Proposals containing misrepresentations or any other inaccurate, misleading or incomplete information, (iii) the refusal of the respondent to honour submitted pricing or other commitments, or (iv) any conduct, situation or circumstance determined by the CVRD, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.
- (p) Respondents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be made in writing to the RFP Contact and must be made within sixty (60) days of such notification. The intent of the debriefing information session is to aid the respondent in presenting a better submission in response to subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process or its outcome.
- (q) The CVRD makes no guarantee of the value or volume of work to be assigned to the successful respondent. The contract with the selected respondent will not be an exclusive contract for the provision of the described Deliverables. The CVRD may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.
- (r) These terms (i) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision); (ii) are non-exhaustive and shall not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and (iii) are to be governed by and construed in accordance with the laws of the province of British Columbia and the federal laws of Canada applicable therein.