
REGIONAL DISTRICT OF CENTRAL KOOTENAY

REQUEST FOR PROPOSALS NO. 08-02

*Consulting Services for
Smart Planning for Communities Initiative – Community Assessment*

Proposals will be received at:

*Regional District of Central Kootenay
Box 590, 202 Lakeside Drive
Nelson, BC V1L 5R4*





*Consulting Services for
Smart Planning for Communities Initiative – Community Assessment*

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1. Invitation and Instructions

The Regional District of Central Kootenay (RDCK) invites proposals from experienced and qualified consultants to develop a Community Assessment for the RDCK. The Community Assessment is intended to review the RDCK's readiness to engage the broader Smart Planning for Communities Initiative.

Complete copies of your proposal must be submitted in a sealed package labeled "RFP 08-03 (4720-38) – Regional District of Central Kootenay Community Assessment" to Monty Horton, Planner, no later than 2:00 p.m. local time, **January 19, 2009**. The proponent's name and return mailing address must be clearly marked on the outside of the proposal submission package. Late proposals will not be accepted and will be returned unopened, to the proponent. **Facsimile proposals and electronically submitted proposals are acceptable.**

Project Administrator:

Monty Horton, Planner
Regional District of Central Kootenay
Box 590, 202 Lakeside Drive
Nelson, BC V1L 5R4

mhorton@rdck.bc.ca
Phone: (250) 352-8159
Fax: (250) 352-9300

It is each Proponent's responsibility to ensure that it seeks clarification on any matter relating to this RFP. Requests for clarification must be made in writing by email or fax to the RDCK Planner.

The Regional District reserves the right to waive informalities in proposals, negotiate any proposal and reject any or all proposals. The Regional District will not be responsible for costs incurred by the proponent in submitting a proposal.

Proposal prices must be firm for a period of 60 days after the closing date of **January 19, 2009**. The Regional District shall not be obligated in any manner to any proponent until a written agreement has been duly executed by both parties.

If the RDCK determines that an amendment is required to this RFP, the RDCK will post a written addendum on the RDCK website, www.rdck.bc.ca, that will form part of this RFP and shall be acknowledged in the proposal submission. Upon submitting a proposal, Proponents will be deemed to have received notice of addenda.

2. Introduction and Background

Regional District of Central Kootenay

The Regional District of Central Kootenay covers an area of some 22,130 square kilometers and has a population of approximately 55,883 people. Approximately 46% of the population



resides within the regional district's nine member municipalities and the other 54% within the eleven rural electoral areas.

The Regional Board of Directors is comprised of two types of representatives – electoral area directors and municipal directors. Electoral area directors are elected to a three-year term to serve specific electoral areas. Municipal directors are first elected to a municipal council for a three-year term and are then appointed by their council to the Regional Board.

The RDCK Board of Directors include eleven (11) electoral area directors representing rural residents and nine (9) municipal directors representing the residents of the municipalities included within the Regional District. Each municipality or electoral area participates in a variety of regional or local services.

Smart Planning for Communities Initiative

Smart Planning is a process for envisioning and planning for the long-term well being of communities. Smart Planning builds on existing planning tools in B.C. It provides a framework that helps communities plan for their own needs while ensuring that the needs of future generations can be met. Smart Planning emphasizes:

- long-term thinking;
- broadening the scope of planning to encompass the social, economic, environmental and cultural aspects of a community;
- integration of planning and decision-making processes at various levels, e.g. air quality planning with local land use planning with regional transportation planning with energy planning etc.;
- collaboration between sectors;
- enhanced public engagement and education;
- implementation of plans; and
- setting targets, and monitoring and evaluating progress.

The Smart Planning Initiative builds local governments and First Nations' capacity to engage in innovative planning processes that incorporate sustainability principles and use integrated decision-making throughout.

More information on the Smart Planning for Communities Initiative at this link:
http://www.cd.gov.bc.ca/lgd/intergov_relations/smart_planning.htm

3. Project Description

The community assessment is a pre-planning phase that is intended to gauge the RDCK's readiness to engage in the Smart Planning for Communities Initiative. The community assessment is the first step towards more comprehensive sustainability planning, and is designed to help communities take stock of:

- Priority areas in the community;



- The plans and capacity currently in place to address these priority areas; and,
- Next steps for moving forward with sustainability planning.

The project will entail a high level review of all current documents and policies of the Regional District of Central Kootenay related to land use, infrastructure, economic, social and cultural initiatives. There will also be stakeholder meetings with community leaders involved in social, cultural, economic, development and educational activities. Purpose of these meetings is to discuss current strengths and weaknesses of existing plans and to identify opportunities to further explore sustainability initiatives. Lastly, a written summary of public input and a draft report for Board to review the community assessment.

The Regional District of Central Kootenay is seeking a proposal from individuals with experience in strategic planning, group facilitation, and organizing and implementing a number of community information sessions in a rural environment.

4. Scope of Services

Study Area

The study area includes the entire RDCK, excluding the municipalities of Castlegar, Nelson, Salmo, Creston, Kaslo, New Denver, Slocan, Silverton, and Nakusp.

Methodology

The project will be completed within a four month period, beginning in January 2009:

1. January 2009: Gather preliminary context information from key sources. RDCK staff can initiate this process at the initial consultant meeting and provide contacts.
2. Early February 2009: One public open house/workshop aimed at gathering and discussing sustainability issues, based on the Community Assessment template (Attachment 1). The consultant may wish to follow-up on these meetings with key stakeholders and agencies in each area.
3. February through April 2009: Verify findings, and compile and prepare information for inclusion in the Community Assessment document. This Community Assessment will be used by the RDCK to determine a summary of next steps and project priorities in the context of the broader Smart Planning initiative.

One open house/workshop is expected for this assignment. This public session will include a summary of findings to date, highlight current sustainability issues, and focus discussion on sustainability initiatives, based on the Community Assessment template.

While the RDCK will be responsible for advertising and securing the venue for the open house, and assisting in facilitation, the consultant will be responsible for preparing the open house materials (boards, sign-in sheets, etc.) and summarize and tabulate the comments made during the open house. The consultant will also consider post open house comments received, and



respond to any questions raised. The consultant may also be asked to present the Community Assessment to the RDCK Board, highlighting issues raised, work completed, and any recommendations. The consultant will incorporate any changes recommended by RDCK staff.

Deliverables by Consultant

Draft Community Assessment Report

The consultant will prepare a draft Community Assessment report including:

1. A summary of all comments received at the public open house
2. Executive Summary
3. Inventory of any applicable Provincial or Local regulations in place aimed at managing sustainability issues
4. Inventory of current plans, and the overall state of planning in the RDCK area
5. Priority issues (if possible, break down into Electoral Area)
6. Next steps, in the context of the Provincial Smart Planning initiative

The final Community Assessment report will respond to any questions or concerns recommended by the RDCK. It will be provided in both digital and hardcopy formats to the satisfaction of the RDCK.

Open House/Workshop Facilitation

The consultant will conduct one open house/workshop focused on presenting information concerning the Smart Planning initiative to the public, as well as gathering feedback based on the Community Assessment template (Attachment 1).

Deliverables by the Regional District of Central Kootenay

1. Support at community open houses, including attendance by RDCK staff, hall booking information, presentation resources, and refreshments.
2. Mapping information, where available
3. Resolution of the Regional Board of Directors

Timeline

The project is expected to be completed by April 30, 2009. There will be no extensions.

5. Proposal Content and Submission

Proposal submissions should be clear, concise and present the consultant team, experience of all individuals involved, methodology, task time schedule, and fees.



Electronic Transmissions

Electronically transmitted proposals will be accepted if received before the closing date and time, either fax or email to the Project Administrator.

Qualifications and Experience

The proponent must include in the proposal, a list of the personnel on the project team, their project role and a curriculum vitae for each member of the team. Sub-consultants, if any, must be identified. The proponent must include a statement of qualifications and relevant experience in support of the proposal.

- the experience of the consultant(s) in the context of the development of community assessments, conducting group facilitation for the purpose of information gathering, and compiling the information.
- awareness of the consultant(s) assigned to the project with respect to the scope of the rural area, and how the information will be delivered, along with how information will be collected, analyzed, and compiled from local residents
- appropriate professional qualifications of the individuals assigned to the work

The proponent should include in the proposal, a minimum of three references from former clients and/or work experience with a brief description of the project completed.

Proposal Content

The following guidelines have been prepared to identify the information requested in a Proposal for this RFP. In general, the submission must be brief while still providing the necessary information to evaluate the content against the requirements.

1. Identification of Proponent and statement of the Proponent's understanding of the project and its requirements
2. Table of Contents
3. Body of the proposal including background, project understanding and methodology for the work
4. Identification of a Project Manager, including a brief summary of experience on similar work
5. Identification of the Proponent's project team, including any sub-consultants. Include a brief background summary of each of the team members. Resumes for project team members should NOT be included in the original proposal submission, unless specifically requested by the RDCK.
6. Provision of a proposed time schedule for completing the works.
7. Provision of a fee schedule clearly outlining proposed costs for all components of the services, including disbursements and a total lump sum fee, excluding GST.



6. Work Plan and Schedule

The RDCK proposes to complete this project by the end of April 2009. The proponent shall prepare a project schedule identifying all steps in the preparation of the Community Assessment as part of the proposal. The overall scheduling criteria shown below must be reflected in the proponent's submission:

- | | |
|--|---------------------|
| 1. Proposal submission closing date | January 19, 2009 |
| 2. Award of contract | January 23, 2009 |
| 3. Start-up meeting with RDCK staff | Late-January 2009 |
| 4. Open House/Workshop | Early February 2009 |
| 5. Draft Community Assessment report | March 2009 |
| 6. Presentation of Final Community Assessment report | April 2009 |

7. Fee Structure

Total budget for this project is \$5,000, including all fees and disbursements, excluding GST. The proponent must specify in the proposal the fees required to satisfy the terms of reference for the project, the work plan and the methodology. The proponent must clearly identify and detail all costs.

Payment will be made in fixed lump sum amounts based on the satisfactory completion of both the draft and final Community Assessment report. The first 50% will be paid to the consultant upon the successful delivery of the draft report. The second 50% will be paid to the consultant upon the successful delivery of the final report.

Invoices will be requested by the RDCK for payment. Please do not submit monthly invoices.

8. Documents

The successful proponent will produce and provide to the Regional District, draft and final documents concerning the completion of the project in two electronic formats (Microsoft Word [.doc] and Adobe Portable Document Format [.pdf]). The proponent will also provide one hard copy of the draft and final documents to the Regional District.

9. Project Administrator

Questions should be directed to the Project Administrator:

Monty Horton, Planner
Regional District of Central Kootenay
PO Box 590, 202 Lakeside Drive



Nelson, BC V1L 5R4
(250) 352-8159
mhorton@rdck.bc.ca

10. Evaluation of Proposals

Consideration will include the professional qualifications, experience, local knowledge, work plan methodology and schedule, price and quality of proposal. The proposal submission should be clear, concise and complete. The Regional District shall be the sole judge of a proposal and its decision shall be final.

Consultant Qualification and Experience	30 points
Work Plan, Methodology and Schedule	30 points
Price	30 points
Overall Quality of Proposal	10 points
Total	100 points

11. Ownership of Proposals and Freedom of Information

Proposals will be received and held in confidence by the Regional District, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

All documents, including proposals, submitted to the Regional District become the property of the Regional District. The Regional District will provide a debriefing for individual proponents at their request to the *Freedom of Information and Protection of Privacy Act*.



Attachment 1: Community Assessment Template



GENERAL NOTES ON THIS TEMPLATE

What is Smart Planning (formerly Integrated Community Sustainability Planning)?

Smart Planning encourages communities to take a fresh look at their future and take proactive steps to get there. Smart Planning provides a framework for community sustainability planning, i.e. helps communities plan for their own needs while ensuring that the needs of future generations are also met and does so by incorporating an integrated approach that considers broader environmental, economic and social considerations in each planning process beyond current conventional planning frameworks.

Purpose of this template

The purpose of this community assessment is to assist you in assessing your community's readiness to engage in integrated community sustainability planning, or Smart Planning. It is intended to help your community take stock of the: priority areas in your community; the plans and capacity you have in place to address these priority areas and next steps for moving forward with sustainability planning.

How to use this template

As collaboration, public engagement and education are all key aspects of Smart Planning, it is our hope that you will involve a wide range of community stakeholders in the process of working through this template. This might include business, institutional and community leaders, and local government officials in workshops or other forums.



A. Community Context

One starting point for assessing your community's readiness for Smart Planning is to identify current realities and priority areas within your community. This section will help you identify the strengths, challenges, opportunities and priority areas within your community.

A. 1. General

- a) What makes your community special and unique from other communities?
- b) What are the major challenges facing your community?

A. 2. Individual and Community Wellbeing¹

- a) What are the significant strengths of your community relating to individual and community wellbeing?
- b) What are the significant challenges facing your community relating to individual and community wellbeing?
- c) What opportunities are available to your community to improve individual and community wellbeing and further your community's path to sustainability²?
- d) What priority areas within your community relating to individual and community wellbeing do you need to take action on to further your community's path to sustainability?

A. 3. Economy

- a) What are the strengths of your local economy?
- b) What are the challenges facing your community with regards to the economy (e.g. labour shortage or unemployment in your community)?
- c) What opportunities does your community have to enhance its economic strengths in order to further its path to sustainability?
- d) What economic priority areas do you need to take action on to further your community's path to sustainability?
- e) What is the capacity and condition of the physical infrastructure³ of your community?
- f) What physical infrastructure priority areas do you need to take action on to further your community's path to sustainability?

¹ For example: community spirit, a sense of community, art, heritage, culture, health, education, volunteerism, housing, social support, social development, access to community services etc.

² Sustainability: meeting the needs of the present without compromising the ability of future generations to meet their own needs

³ Includes roads, utility infrastructure, hospitals, schools etc.



A. 4. Environment

- a) What are your community's greatest environmental assets?
- b) What environmental challenges or concerns does your community have?
- c) What could your community do to enhance its environmental assets in order to further your community's path to sustainability?
- d) What environmental priority areas do you need to take action on to further your community's path to sustainability?

A. 6. Overall Community Priorities

Reflecting on your answers in A.2.-A.5.:

- a) What are your community's top five priorities that need action in order to further your community's path to sustainability?



B. Assessing the Sustainability Dimensions of Your Community's Vision

Smart Planning is characterized by long-term thinking. This section will assist your community to identify: whether your current vision accurately reflects the desired future for your community; the time horizon of your vision; and next steps for your community with regard to your community's vision to ensure a long-term, sustainable future.

B. 1. a) What is your community's long-term vision and where is it identified (e.g. in OCP)?

b) What is the time horizon of this vision?

c) As part of creating your community vision, did you consider future forces (internal and external) that might change your community in the long-term?

B. 2. a) To what extent is sustainability incorporated into your community's vision?

B. 3. Keeping in mind your community's priority areas (as identified in Section A), to what extent are these captured in your community's vision?

B. 4. What next steps could your community take with regard to its community vision to ensure a sustainable future?



C. Assessing the State of Planning in Your Community

Smart Planning is characterized by plans and planning processes that are broad in scope (i.e. address all community aspects) and reflect a coordinated approach that emphasizes linkages between different types of plans and planning activities. Smart Planning also emphasizes putting plans into action. This section will help your community identify: the current state of integration within and between your community’s plans; the degree to which these plans are informing decision-making; and next steps for further integrating and implementing plans.

C. 1. What plans does your community have in place? Please ‘check’ the community aspects (see Section F of this template for further description) that each plan currently addresses.

NAME OF PLAN ⁴	LAS T UPD ATE	Health & Social	Arts & Culture & Heritage	Recreation & Leisure	Economic Development	Energy	Water	Food	Natural Areas	Buildings	Land Use	Transportation	Learning	Governance and Partnerships	Affordability & Housing	Materials and Solid Waste	Other	Other

C. 2. For each plan (listed in the above table), please ‘star’ the *additional* aspects of your community that you feel it could or should be addressing in order to ensure a sustainable future (e.g. does your transportation plan consider the land use aspects of your community, and your heritage plan consider energy aspects etc.)

C. 3. Taking a look at each aspect of your community (in the above table):

- a) What aspects of your community are not being addressed or are poorly addressed by your plans?
- b) What aspects of your community are being addressed by more than one of your plans? How do your plans acknowledge and discuss these areas of overlap?
- c) What next steps could your community take to further the integration within and between your plans?

C. 4. a) How well does your implementation and decision-making reflect the directions, policies and guidelines laid out in your plans?

b) What next steps could your community take to further the extent to which your plans are used to inform decision-making that ensures a sustainable future?

C. 5. a) To what extent do your plans reflect and encourage your community’s vision (as identified in Section B)?

b) What next steps could your community take to further the extent to which your plans are used to encourage your community’s vision of sustainability?

⁴ For example: Official Community Plan, Greenways Plan, Neighbourhood Plans, Transportation Plan, Social Plan, Solid Waste Plan, Parks Plan, Capital Plan etc.



D. Assessing Sustainability Planning Capacity and Resources
 Smart Planning is characterized by planning processes that are collaborative (i.e. engage community members and partners to support sustainability) and that emphasize public engagement and education (i.e. designing processes that enhance public input) This section will assist your community to identify: your capacity to engage in sustainability planning; priority areas for building this capacity; a process for initiating your community's sustainability planning; and the financial resources your community could secure to engage in sustainability planning.

D. 1. a) Please identify who in your community has the capacity (knowledge of, familiarity with, and/or expertise) in:

	Planning and Implementation	Sustainability Leadership and Expertise	Communication and Outreach	Technical / Specialized Expertise in Overall Community Priorities (as per A6)
Local government council				
Local government administrators				
Local government staff				
Non-profit sector (i.e. name of organization)				
Private sector (i.e. name of organization)				
Other				

b) Please identify capacity building priority areas (e.g. in sustainability expertise) and how you might go about building this capacity (e.g. by holding workshops, e-learning sessions or public events on key Smart Planning topics)

D. 2. a) What planning committees and task forces does your community have? To what extent do these committees offer opportunities for community participation?

b) What other committees meet regularly in your community (e.g. parent advisory committee, library committees etc.)?

D. 3. a) What other opportunities exist for citizens, community organizations and sectors to participate in a decision-making or advisory role within your community?

b) What are some of the challenges to community participation (e.g. distances, time, demographics)

D. 4. a) Given the capacity within your community and the current opportunities for participation in decision-making (as identified in questions D.1.-3.), what next steps could your community take in order to move ahead with sustainability planning?

b) An initiation committee plays an important role to ensure that the process gets underway. Who will be the key individuals that sit on this committee to help shape the project and process in the months to come?



D. 5. Please use the table below to identify the financial resources your local government has (or knows about) to engage in sustainability planning and the next steps you could take to secure these resources?

	Resource	Amount	Method of Securing Resource
Local government (e.g. budget for staff person)			
Provincial government (e.g. names of grants)			
Other local authorities			
Other organizations (e.g. Federation of Canadian Municipalities)			

E. Moving Forward with Smart Planning: Next Steps

Smart Planning encourages communities to take a fresh look at their future and take actions to become more sustainable. As you have moved through this community assessment, your community has identified priority areas and next steps to action. The purpose of this section is to bring these together and set out a strategic course of action for your community to move ahead with Smart Planning. With this in mind, please identify:

- 1. Community priority areas (A.2.d., A.3.d, A.3.f., A.4.d., A.6.)**
- 2. Next steps for your vision of a sustainable community (B.4.)**
- 3. Next steps for enhancing the integration and effective implementation of your plans (C.3.c., C.4.b., C.5.b.)**
- 4. Next steps for building your capacity to engage in Smart Planning (D.1.b), engaging in Smart Planning, i.e. identifying the initiation committee (D.4.a-b), and securing resources for engaging in Smart Planning (D.5)**

Congratulations! You have made it this far. We would now like to encourage you to:

- 5. Create your plan for putting these next steps into action.**



F. Community Aspect Categories (through a sustainability lens)

Categories as taken from the Alberta Union of Municipalities Association Draft Guidebook for Integrated Community Sustainability Planning (ICSP), or Smart Planning.

Health and Social - How to meet the health and social needs (including physical, mental, spiritual and emotional) of the community.

Arts/Culture/Heritage - How arts, culture and heritage will be supported, enhanced and delivered, and how they will stimulate and support the transition to sustainability in your community.

Recreation & Leisure - How recreation and leisure activities for both residents and visitors will be delivered to exceed expectations while protecting the environment.

Economic Development - How your community will create a strong local economy and develop and maintain successful, resilient businesses that help move the community toward sustainability.

Energy - How to meet your community's energy needs in an efficient, affordable, sustainable and reliable way, while managing greenhouse gas emissions and air quality.

Water - How to provide a dependable supply of high quality water in a way that maintains healthy aquatic environments and uses water efficiently.

Food - How to ensure a healthy, nutritious and sustainable food supply that maximizes opportunities to build the social, ecological, cultural and economic capital of the community.

Natural Areas - How ecosystem integrity and biodiversity will be protected and where possible restored in your community/region.

Built Environment - How to develop and renew buildings, neighbourhoods and facilities that will contribute to making your community unique, livable and sustainable.

Transportation - How to move residents, employees, visitors, and materials to, from and within the community in a more sustainable manner.

Learning - How to meet resident and visitor needs for formal and informal lifelong learning.

Governance & Partnerships - How local government and other stakeholders will organize and collaborate in decision-making and implementation of the ICSP.

Affordability & Housing - How to make living and playing in your community affordable for residents, and how to meet housing needs of diverse permanent residents.



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Materials and Solid Waste - How to meet your community's need for material supply and disposal through the most efficient use and reuse of the most sustainable materials and keeping waste out of the natural environment.