



## REQUEST FOR PROPOSALS

### Development of an Economic Development Strategic plan for the Shuswap Economic Development Society.

Proposals clearly marked “**Proposal – Shuswap Economic Development Society Strategic plan**” will be accepted until **4 PM** local time on **Friday, May 7, 2022** at the office of the Shuswap Economic Development Society, U3, 220 Shuswap Street S. Salmon Arm, BC, V1E 4P1, or by electronic submission via email in PDF format to [john.reed@shuswapecdev.ca](mailto:john.reed@shuswapecdev.ca)

Proposal documents and further information are available online at the [www.shuswapecdev.ca](http://www.shuswapecdev.ca)

The Shuswap Economic Development Society 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 Shuswap Economic Development Society reserves the right to accept the Proposal, which it deems to be most advantageous.

Emailed submissions will be accepted.

The lowest of any Proposal is not necessarily accepted.

For more information, please contact:  
John Reed, Executive Director  
c. 250 804 5527 e. [john.reed@shuswapecdev.ca](mailto:john.reed@shuswapecdev.ca)

March 8, 2022

## SHUSWAP ECONOMIC DEVELOPMENT STRATEGIC PLAN REQUEST FOR PROPOSALS An Overview

The Shuswap Economic Development Society (the “Society”) is issuing this Request for Proposals (RFP) to invite qualified consultants to offer their expertise to facilitate and guide a strategic process, designed to formulate a Strategic plan for the Society.

The purpose of the Society is to promote and support the economic well-being of the communities within its service areas (“Service Area”), which are part of the Columbia Shuswap Regional District (CSRD). These Service Areas include: Electoral Area C (South Shuswap), Electoral Area D (Deep Creek/Salmon Valley/Falkland), and Electoral Area F (North Shuswap).

The strategic process shall include a current situational analysis of the Service Area including:

- active consultation with relevant stakeholders,
- an analysis of all relevant existing economic data,
- a review of prior relevant economic studies and reports, and
- an assessment of risks, opportunities, and constraints to economic development.

The Strategic plan shall provide a blueprint for economic development within the Service Area for the next 5 years. The plan will identify the key directions and initiatives of the Society and will include action plans, implementation objectives, goals and evaluation methodologies.

The Strategic process and plan shall be developed with active collaboration with the Society’s officers, directors and applicable CSRD elected area directors. The outcome of this process must reflect a shared vision of the Society’s future.

The final deliverable of this project shall be a written report prepared by the consultant that will outline the strategic process, the findings and the details of the Strategic plan.

This project has been identified as one of the top priorities in the 2022 work plan for the Society, and this Strategic plan will guide the organizations, over the next three to five years.

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## **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 Shuswap Economic Development Society.

### **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 Shuswap Economic Development Society and a Preferred Proponent to undertake the Services;

**“Office”** means the office of the Shuswap Economic Development Society

**“Preferred Proponent(s)”** means the Proponent(s) selected by the Shuswap Economic Development Society 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:

Shuswap Economic Development Society  
Attention: John Reed,  
Executive Director  
U3, 220 Shuswap Street S.  
Salmon Arm, BC V1E 4P1

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

[john.reed@shuswapecdev.ca](mailto:john.reed@shuswapecdev.ca)

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

**Time: 4 PM local time**  
**Date: Monday, May 2, 2022**

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 Shuswap Economic Development Society 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 "Shuswap Economic Development Society Representative")**:

John Reed  
Executive Director,  
Shuswap Economic Development Society  
Email: [john.reed@shuswapecdev.ca](mailto:john.reed@shuswapecdev.ca)

Information obtained from any person or source other than the Shuswap Economic Development Society's Representative may not be relied upon.

Inquiries should be made no later than three days before Closing Time. The Shuswap Economic Development Society 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 Shuswap Economic Development Society.

Proponents finding discrepancies or omissions in the RFP, or having doubts as to the meaning or intent of any provision, should immediately notify the Shuswap Economic Development Society Representative. If the Shuswap Economic Development Society determines that an amendment is required to this RFP, the Shuswap Economic Development Society 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 Shuswap Economic Development Society determines that an amendment is required to this RFP, the Shuswap Economic Development Society will post a written addendum on the Shuswap Economic Development Society's website [www.shuswapecdev.ca](http://www.shuswapecdev.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 Shuswap Economic Development Society's website. Upon submitting a Proposal, Proponents will be deemed to have received notice of all addenda that are posted on the Shuswap Economic Development Society'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 \$35,000.00. This budget includes all aspects relating to the establishment of the economic development Strategic plan which includes research, committee meetings, community consultation, and reporting to the Shuswap Economic Development Society Economic Development Advisory Committee, regularly on the progress of the economic development Strategic plan. All work completed has to be within this budgeted amount.

The target completion of the Strategic plan is **November 17th, 2022**.

The Shuswap Economic Development Society 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 Shuswap Economic Development Society 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 Shuswap Economic Development Society. Furthermore, the Shuswap Economic Development Society 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 Shuswap Economic Development Society 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 Shuswap Economic Development Society will evaluate the Proposals by applying the evaluation criteria as described in Section 4.2 to identify the Proponent that the Shuswap Economic Development Society determines is the most advantageous to the Shuswap Economic Development Society.

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 Shuswap Economic Development Society will apply the criteria evenly and fairly to all Proposals.

### 4.2 Evaluation Criteria

The Shuswap Economic Development Society 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 Shuswap Economic Development Society, using the following criteria and evaluation scoring guide:

**(a) Experience** **/35**

The Proponent will have at least five 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 /35**

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 /20**

The Shuswap Economic Development Society 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 /10**

The Shuswap Economic Development Society will consider the Proponent's pricing to deliver the objectives as indicated in the Proposal.

/100

**4.3 Additional Information**

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

**4.4 Waiver of Deficiencies**

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

**4.5 Selection of Proponent**

The Shuswap Economic Development Society will select the Proponent which it determines is the most advantageous to the Shuswap Economic Development Society based on the Evaluation Criteria set out in Section 4.2 above. The Shuswap Economic Development Society is not bound to accept the lowest priced Proposal. The Shuswap Economic Development Society 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 Shuswap Economic Development Society to enter into negotiations for a Contract, the Proponent will, in good faith, participate in negotiations with the Shuswap Economic Development Society and use reasonable commercial efforts to reach agreement and finalize a Contract with the Shuswap Economic Development Society based on the Proponent's Proposal.

#### 4.7 Negotiation of Contract and Award

If the Shuswap Economic Development Society 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 Shuswap Economic Development Society and the Preferred Proponent(s) will finalize the Contract(s); or
- (c) If at any time the Shuswap Economic Development Society 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 Shuswap Economic Development Society may then either open discussions with another Proponent or terminate this RFP and retain or obtain the services in some other manner.

#### 4.8 Proposed schedule and timeline

<b>Event</b>	<b>Estimated date</b>
Request for proposal published	March 7, 2022
Deadline for questions from vendors	March 17 <sup>th</sup> , 2022
Final addendum for questions published	March 24 <sup>th</sup> , 2022
Deadline for proposal submissions	May 7, 2022
Proposal Review	May 9-13 <sup>th</sup> (presentation May 16 <sup>th</sup> Board meeting)
Tentative date for awarding contract	May 17 <sup>th</sup> , 2022
Phase 1- presentation & review of Phase 1 work, to SEDS Strategic planning committee	July 17 <sup>th</sup> , 2022
Phase 2- presentation & review of Phase 2 work, to SEDS Strategic planning committee	Sept 17 <sup>th</sup> , 2022
Phase 3 & Final Phase - presentation & review of Phase 3 work, to SEDS Strategic planning committee	Nov 1, 2022
Project Completion deadline	Nov 17 <sup>th</sup> , 2022



## **5. GENERAL CONDITIONS**

### **5.1 No Shuswap Economic Development Society Obligation**

This RFP is not a tender and does not commit the Shuswap Economic Development Society in any way to select a Preferred Proponent, or to proceed to negotiations for a Contract, or to award any Contract, and the Shuswap Economic Development Society 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 Shuswap Economic Development Society relating to or arising from this RFP. The Shuswap Economic Development Society 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 Shuswap Economic Development Society, its elected or appointed officials or employees. The Shuswap Economic Development Society may rely on such disclosure.

### **5.5 Confidentiality**

All submissions become the property of the Shuswap Economic Development Society and will not be returned to the Proponent. All submissions will be held in confidence by the Shuswap Economic Development Society unless otherwise required by law. Proponents should be aware the Shuswap Economic Development Society 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 Shuswap Economic Development Society, 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 Shuswap Economic Development Society 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 STRATEGIC PLAN

#### 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, answering the question – How do we prosper into the future?.

#### **OBJECTIVES & DESIRED OUTCOMES**

**Phase 1** – required objectives for completion, 1-3 inclusive

1. Review of existing work done to date, for example:
  - a. Shuswap Agriculture Strategic plan
  - b. Business Retention and Expansion Program research
  - c. CSRD Economic Development Strategic Plan 2018
  - d. Related documents, reports, housing studies, and studies prepared by other organizations and agencies, within and outside of the CSRD.
2. Competitive advantage? Review and identify the regions assets and competitive advantage, with proposed activities and programs, to incorporate into the overall Economic Development Strategy. This should include a SWOT assessment of the region, as well as a tax rate comparison with competitive regions.
3. Create Community profiles for each Electoral area (C, D & F) with a focus on: key demographic trends and forecasts, an environmental security analysis, social, climate and economic factors, as well as financial indicators, for inclusion in the strategy.

**Presentation and review of Phase 1 work with the Strategic planning committee.**

**Phase 2**- required objectives for completion, 4-6 inclusive.

4. Review and analyze local bylaws, policies, processes and regulations to provide recommendations on making adjustments, where necessary and appropriate, to support sustainable economic growth and diversification.
5. Review and determine the growth potential of current economic sectors and identify unrecognized economic hubs, including conducting a Workforce Gap Analysis.

6. Community/Public consultation and engagement process (encompassing all communities and rural areas)
  - a. on-line survey(s) resulting in useable data (using a data sample size, to deliver a margin of error of +/- 5%).
  - b. community focus groups
  - c. one-on-one stakeholder interviews
  - d. youth engagement

**Phase 3** – required objectives for completion, 7-9 inclusive.

7. Determine recommendations for a Business Investment and Attraction Strategy, as part of the overall Economic Development Strategy.
8. Develop recommendations for a Workforce Strategy and Attraction plan, as part of the overall Economic Development Strategy.
9. The Economic Development Strategy (EDS) is to include a 3–5-year action plan, to direct implementation objectives and goals set forth in the Strategy, performance measures, timelines, and the overall evaluation methodology.

In addition, the Economic Development Strategy is to include, a first-year tactical plan.

### **Final Phase**

10. Refine draft document in conjunction with Committee.
11. Release for public review (optional).
12. Refine final document and prepare for Committee approval.
13. 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 society 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 Shuswap Economic Development Society.

#### ***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.
- How do you maximize the impact of an economic development organization in a community?
- What is your Strategic plan development process?

### *Consulting Services*

- Describe how you lead Strategic plan 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 Shuswap Economic Development Society.

### *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.