



# Friends of Kootenay Lake

**Friends of Kootenay Lake**

**Request for Proposals**

## **Kootenay Lake Community Values Study**

**November 9<sup>th</sup>, 2015**

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# Request for Proposals Kootenay Lake Community Values Study

## 1 Introduction

Friends of Kootenay Lake (FOKL) is requesting proposals from qualified professionals to provide services to conduct a Kootenay Lake Community Values Study. The study will engage Kootenay Lake residents (as well as those who feel significantly impacted by the lake and its hydrological basin) in expressing their values of the lake and their visions for its future. The campaign will begin with educational and celebratory elements, and proceed with an array of engagement mechanisms to facilitate diverse input across Kootenay Lake's communities. In order to provide a robust and accurate contribution toward the development of a Lake Management Plan, emphasis will be placed on maximizing participation and gathering reliable data that produces statistically significant results. FOKL intends to initiate the study in December 2015.

The project will include four phases:

1. Preparation - Create engagement and sampling strategies
2. Background and community orientation - Promote upcoming survey and share existing community values data
3. Active community dialogue – Hold community engagement events and disseminate survey
4. Analysis and reporting – Create tools to promote understanding of community values, including written reports, presentations, and online content

FOKL is inviting your firm to submit a proposal to conduct the Kootenay Lake Community Values Study based upon the criteria contained within this Request for Proposal (RFP).

## 2 Instructions to Proponents

### Closing Time, Address for Proposal Delivery, and Proponent Selection Date

Proposals must be received electronically at:

[friendsofkootenaylake@gmail.com](mailto:friendsofkootenaylake@gmail.com)

Attention: Claire de la Salle – Program Manager

On or before the following date and time (closing time):

**Date: November 26<sup>th</sup>, 2015**

**Time: 11:00pm (PST)**

FOKL intends to select a preferred Proponent by December 4<sup>th</sup>, 2015 with work to commence immediately thereafter.

FOKL intends to complete the four phases of the Kootenay Lake Community Values Study by September 23<sup>rd</sup>, 2016.

Document standards:

- Must be in Adobe Acrobat format
- File name must end in ".pdf"

- Proposals should be clearly marked with the Request for Proposal title and the name of the Proponent in the subject line
- The date and time of submission will be based on the FOKL receiving computer. Proposals shall be deemed to be successfully received when displayed as a new email.
- ***If you have not received email confirmation within 24hours of submitting your proposal please contact 250-777-2955 ASAP.***

### Late Proposals

Proposals received after the Closing Time (November 26<sup>th</sup> at 11pm) will not be accepted. It is the sole responsibility of the Proponent to ensure their proposal is received; please set your internal email read receipt function. Where possible, FOKL will send a confirmation of receipt by reply. FOKL will not be liable for any delay for any reason, including technological delays, spam filters, firewalls, job queue, file size limitations, etc.

### Inquiries

It is the responsibility of the Proponent to thoroughly examine the RFP and ensure that the requirements contained are fully understood. Requests for clarifications or additional information related to this Request for Proposal must be directed, **by email or phone**, to the following person:

Miss. Claire de la Salle  
 Program Manager  
 Friends of Kootenay Lake  
 Phone: (250)-777-2955  
 Email: friendsofkootenaylake@gmail.com

## 3 Project Overview

### Background

#### **Friends of Kootenay Lake**

Formed in 2012, Friends of Kootenay Lake (FOKL) is an inclusive stewardship organization dedicated to sustaining a healthy Kootenay Lake for future generations, Salient values include sustaining ecosystem integrity, clean water, and natural fish and wildlife habitat, promoting human wellbeing through sustainable livelihoods and preserving the lake's culture and spiritual essence.

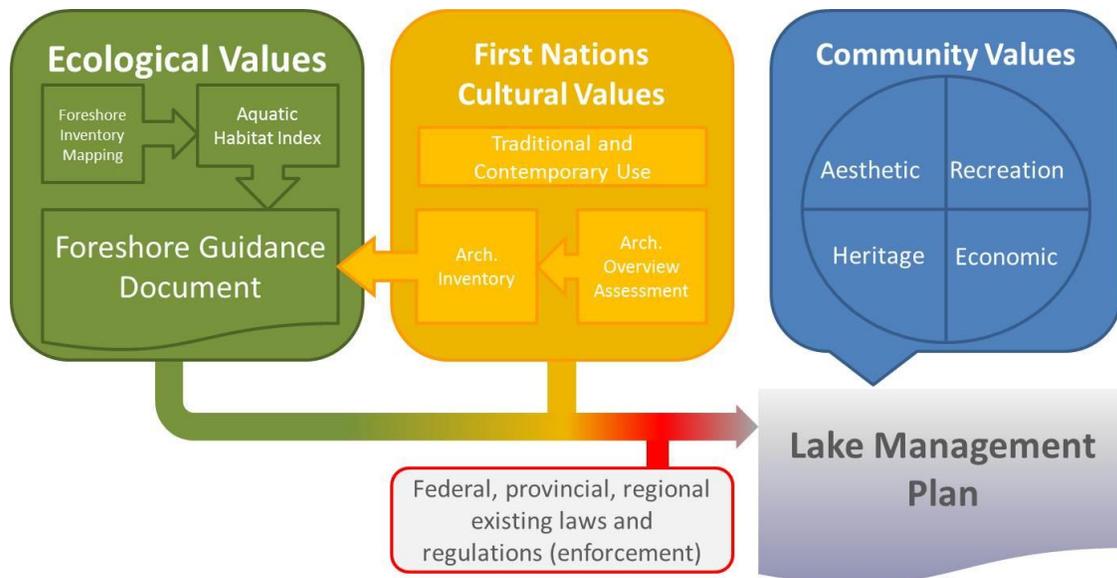
FOKL seeks to represent a cross-section of stakeholders with a collective vision for stewardship, defined as "the careful and responsible management of ecosystems." FOKL assists in identifying threats and addressing issues including cumulative impacts. FOKL advocates for balanced and coordinated lake management: specifically, planning that will maintain and restore the ecosystem integrity of the lake. With its focus on public education and the collection, development and dissemination of information about the lake, FOKL aims to ensure the lake continues to contribute to the region's economic, social and cultural richness.

FOKL provides a community vision to decision-makers for lake planning and development. It achieves excellence in stewardship through collaboration and evidence-based decision-making in its project development and management. FOKL works to develop community

participation, passion and pride in lake stewardship and provides a voice for the lake's stewardship community to regional and international management and governance bodies.

### **Kootenay Lake Partnership**

Since 2010, the Kootenay Lake Partnership (a collaboration among all levels of government including First Nations) has been working towards improving governance on Kootenay Lake. They are working to complete two of the three elements of the Lake Management Plan (see image below) including scientific surveys assessing both ecological values and First Nations cultural values.



Community values must also be considered in developing the plan in order to ensure that the plan meets the needs and interests of the community that will ultimately live with and support the Lake Management Plan. The Kootenay Lake Community Values study will help to strengthen social, economic, and environmental well-being in the Kootenay Lake area.

The Kootenay Lake Community Values Study will provide the third and final element needed to develop a comprehensive Kootenay Lake Management Plan. The plan will allow community members and regulatory agencies to be better informed on the ecological, First Nations, and community values across federal, provincial, regional, and municipal jurisdictions.

### **Lake Advisory Council**

In order to ensure the study meets the needs of local people the study will have oversight from the Lake Advisory Council. The Council is composed of 24 individuals who represent a diverse group of stakeholders on Kootenay Lake including industry, recreation, business, economic development, First Nations, municipal and provincial government, conservation, technical advisers and community representatives. The Council was established in November of 2013 by FOKL as a central location for diverse stakeholders to:

- Identify and prioritize opportunities for research and stewardship
- Identify and prioritize potential threats to the lake's socioeconomic and ecological values
- Promote the development and capacity building of Friends of Kootenay Lake

## Goals and Objectives

The goals and objectives of the Kootenay Lake Community Values Study are as follows:

### **Goal 1 – Vision and Awareness**

- Document community member's values and visions for Kootenay Lake and share results.

#### Goal 1 Objectives

- a) Identify and prioritize what community members value (and tradeoffs among them) about Kootenay Lake (eg drinking water, recreation, habitat, tourism, economic resource)
- b) Elicit statements from stakeholders regarding their visions for Kootenay Lake's future and their roles in shaping it.
- c) Increase government, NGO, and other stakeholders' understanding of community values

### **Goal 2 - Interests and Priorities**

- Understand the interests of stakeholders and community members.
- Identify key attributes and locations that are important in terms of historical, cultural, recreational, and community values.

#### Goal 2 Objectives

- a) Identify recreation hotspots and key locations around the lake related to community values.
- b) Identify attributes of the lake that contribute to community priorities.
- c) Identify features and locations that are historically/culturally significant to non-First Nations community members (First Nations Cultural Values will be captured in a study being conducted by the Kootenay Lake Partnership).

### **Goal 3 - Planning**

- Improve understanding of community priorities for lake management.

#### Goal 3 Objectives

- a) Identify where the community would like more or less development impacts to aquatic and terrestrial ecosystems
- b) Explore people's opinions regarding changing the level of development on Kootenay Lake (what do people think is the right balance between conservation and development).
- c) Determine usage levels of lake recreation – number of users and frequency and type of use.
- d) Develop a series of situational questions to explore how people would feel if things were changed. This may help inform decision makers on what planning tools make the most sense. Here are some examples of situations questions that could be asked:
  - Would you be concerned if motorized use was restricted?
  - What if dock types were restricted?
  - What if boat washing was required?
  - How would you feel if public access was limited?
  - What would limit your ability/desire to protect riparian zones?

- How would you feel about water levels were kept lower during some parts of the year?

**Goal 4 – Sharing Understanding**

- Create a public resource summarizing Kootenay Lake community values to support the lake management planning process being led by the Kootenay Lake Partnership which seeks to combine ecological, First Nations, and community values into a Lake Management Plan.
- Support policy makers on land use and water management beyond existing legislation and bylaws by providing a resource summarizing community values.

Goal 4 Objectives

- Analyze and compare survey results, comments, and other community input
- Create written reports, online content, videos, and other media to encourage the broad dissemination of the data and its analysis
- Provide access to summary and analysis to policy makers and the public.

The end product of the study will be a Kootenay Lake Community Values report that will be made widely available and will include next steps for incorporating community values into a Lake Management Plan. Simply put, the purpose of the study is to 'take the pulse' of community values for Kootenay Lake.

4 Phases of Work, Actions and Deliverables, and Estimated Time Frame

Phases of Work	Actions and Deliverables	Estimated Time Frame
Phase 1 - Preparation	<ul style="list-style-type: none"> <li>• Orientation to Kootenay Lake</li> <li>• Work with Lake Advisory Council (LAC) to define stakeholder group and target audience as well as brainstorm ideas for engagement and sampling strategy (face-to-face meeting)</li> <li>• An evaluation component shall be built into the community engagement process to allow participants the change to provide feedback on the engagement process.</li> <li>• Create a draft engagement, survey design, and sampling strategy which will produce statistically significant results and will achieve the goals and objectives of the study. The strategy will define how to reach target audiences, how to reach the greatest diversity and quantity of people, and how to disseminate the survey (ex. web strategy, mail out, newspapers, social media, radio). The plan will be reviewed by the Steering Committee (SC) and Rural Development Institute (RDI).</li> <li>• Integrate feedback from SC and RDI to create a final version of the strategy.</li> </ul>	December 2015-January 2016

Phase 2 - Background and Community Orientation	<ul style="list-style-type: none"> <li>Summarize existing community values data (from various sources including OCP surveys, Kootenay Conservation Program polling research, and municipal planning documents) and prepare and distribute a public summary.</li> <li>Distribute info to public on past surveys and promote and advertise upcoming survey.</li> </ul>	January 2016-February 2016
Phase 3- Active Community Dialog	<ul style="list-style-type: none"> <li>Design and implement community engagement events that will reach a broad audience, be inclusive and scientifically valid. Event design will include innovative ideas on how to engage community members and ideas on incentives to use to maximize participation.</li> <li>Create visual products, such as maps, that will facilitate learning and create a more meaningful engagement process (some data for maps may be provided by RDI).</li> <li>Plan, facilitate and promote at least 8 multi-format, interactive events in different communities around the lake for residents of all ages to reflect on what they value about the lake.</li> <li>Promote survey at events and with key stakeholder groups around the lake (minimum 5) to increase the capacity to reach the greatest diversity and quantity of people (ex. Eastshore Spring Forum, Rod and Gun Club, Chamber of Commerce, and Community Associations)</li> <li>Design short survey and send to SC, LAC, and RDI for review. Include face-to-face meeting with the LAC.</li> <li>Integrate feedback from SC, LAC, and RDI to create a final version of the survey.</li> <li>Disseminate survey (distribution will be based on the engagement, survey design, and sampling strategy).</li> <li>Work with web developer (provided by FOKL) to integrate information about the study and the survey to FOKL (and possibly the RDI) website.</li> <li>Compile contact list from engagement process and include the option for participants to be added to the FOKL eNews contact list.</li> </ul>	January 2016 - August 2016
Phase 4 - Analysis and reporting	<ul style="list-style-type: none"> <li>Gather, combine, and analyse the diverse inputs resulting from the community engagement events, widely distributed surveys, and LAC forums to articulate what the community vision is for Kootenay Lake.</li> <li>Produce a map showing specific locations around the lake that community members value.</li> </ul>	September 2016

	<ul style="list-style-type: none"> <li>• Create a Kootenay Lake Community Values report that will be made widely available and will include next steps for incorporating community values into a Lake Management Plan. The report will include the methodology, images to help convey survey outcomes (including photos from engagement process and supporting maps), results (which are statistically significant), and an executive summary.</li> <li>• Host a face-to-face meeting with the LAC to present the results from the study and solicit final feedback.</li> <li>• Integrate feedback from LAC, SC and RDI to create a final version of the report.</li> <li>• Compile contacts for FOKL eNews contact list in excel document (include name and email).</li> <li>• Provide a minimum of 30 photos from the engagement process with associated signed FOKL photo release forms.</li> <li>• Provide summary of participant evaluations</li> </ul>	
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## 5 Additional Notes on Content of Proposal and Study Requirements

- The integrity of broad public involvement is paramount to the process and must not be superseded by any individual or interest group.
- The public engagement process must use a varied approach in order to maximize participation and must include, but not be limited to:
  - Ongoing consultation with FOKL, LAC, SC, and RDI
  - Interviews with community organizations, and other government and corporate organizations.
  - Online public surveys (possibly hosted on RDI website)
- The successful proponent will be responsible for taking photographs throughout the study and will obtain photo consent using the FOKL photo release form. Digital versions of the photos and photo consent forms will be provide to FOKL on a quarterly basis.
- All studies, reports, maps, photos and related resources developed in this project shall become the property of FOKL.
- The Consultant will use a clear and succinct writing style. In order to support the written content in report tables, charts, maps and photographs should be utilized where applicable. The Kootenay Lake Community Values report should be 40 to 60 pages in length, including the supporting information.
- The preferred Proponent's services should be performed in accordance with the proposed schedule outlined in Section Four.

## 6 Proposed Payment Schedule

The proposed project schedule provides percentages indicating level of effort. FOKL will schedule payments for deliverables as follows:

- (a) Satisfactory completion of Phase 1 deliverables = 30% payment January 2016
- (b) Satisfactory completion of Phase 2 deliverables = 25% payment February 2015
- (c) Satisfactory completion of Phase 3 deliverables = 25% payment August 2016
- (d) Satisfactory completion of Phase 4 deliverables = 20% payment October 2016

## 7 Project Budget

The project budget is not to exceed \$43,000 (including taxes) and is expected to cover all fees, expenses (including travel costs), sub-contractor services, consultation and applicable taxes. All actions and deliverables listed under Section 4 are to be included in the budget except for:

- Website maintenance/upgrades/hosting (including integrating community values survey into website)
- FOKL Program Manager time and mileage for project oversight
- Grant administration fees
- Lake Advisory Council and Steering Committee time for project oversight
- Rural Development Institute support

Please submit the budget using the template found in Appendix A.

## 8 Proposal Contents

### Approach

The Proposal must include a proposed methodology to achieve the goals, objectives, and deliverables for the Kootenay Lake Community Values Study. The proposal must include a work plan detailing how each phase of the project is to be executed including an outline of specific targets and actions to be accomplished within the ten month study period. For each phase of the study, state the completion date and cost estimates by using tables and time line charts to convey material.

The Proponent must provide an outline of a proposed community engagement, survey design, and sampling strategy that:

- Will maximize community participation using innovated approaches
- Will utilize a varied approach to obtain input from a wide range of people living around Kootenay Lake (i.e. online surveys; open house with interactive maps, public presentation, website information; interview of key stakeholders).
- Will obtain statistically significant results.

The Consultant will ensure that all relevant communities and stakeholders are contacted and consulted in the Kootenay Lake Community Values Study. It is expected that the Consultant will manage all practical aspects of the public engagement process, including advertising, travel costs (mileage), meals, venue booking, open house materials preparation, facilitation, web information, and surveys.

### **Qualifications and Experience**

Proponents should include as part of their proposals a description of their qualifications and experience, including:

- A description of the Proponent and the Proponent's business, including the Proponent's full legal name and office address;
- Identification of key personnel who will be responsible for the Services, together with a description of the relevant research experience of such personnel;
- Details of examples of similar projects completed by the Proponent; and
- Two references.

### **Fee Proposal**

Proponents should include as part of their proposal the Fee submitted on Appendix A, showing:

- How the Fee shall be broken down into the four phases of the project and expenses categories.
- A list of all personnel the Proponent proposes to perform the Services who are within the Fee including the hourly rates for each individual contained within the Fee.

## **9 Evaluation and Selection**

The FOKL Steering Committee will undertake the evaluation and selection of the Proponent. The FOKL Steering Committee may consult with others including Lake Advisory Council members and references provided by the Proponent, as the FOKL Steering Committee may in its discretion decide is required.

### **Evaluation Criteria**

The FOKL Steering Committee will compare and evaluate all proposals to determine the Proponent's strength and ability to provide the services required using the following evaluation criteria:

1. The qualifications and relevant experience of the Proponent and its key personnel (anticipated weighting - 40%);
2. The Proponent's demonstrated understanding of the required Services and the approach, methodology and management the Proponent would employ to perform the Services (anticipated weighting - 40%);
3. The Proponent's fee proposal (anticipated weighting - 20%).

The FOKL Steering Committee may apply the evaluation criteria on a comparative basis, evaluating the proposals by comparing one Proponent's proposal to another Proponent's proposal. The FOKL Steering Committee will not be obligated to select the proposal that offers the lowest price or cost or any proposal at all.

The weighting listed above with the evaluation criteria indicate the relative weighting anticipated by FOKL and is shown to give general guidance to Proponents in the preparation of Proposals.

The evaluation criteria will be applied to all Proposals fairly and without bias to any Proponent or proposal and the same criteria and weightings will be applied to all proposals.

The FOKL Steering Committee reserves the right to not complete a detailed evaluation of a proposal if the FOKL Steering Committee concludes, having undertaken a preliminary review of the proposal, that the Proponent or proposal as compared to all the proposals is not in contention to be the selected proposal.

#### **Additional Information**

The FOKL Steering Committee may during the evaluation period after the Closing Time and at its discretion, request clarifications or additional information from a Proponent with respect to any proposal, and the FOKL Steering Committee may make such requests to only selected Proponents. In addition, by submitting a proposal, Proponents will be deemed to have authorized FOKL to contact the Proponent's references. The FOKL Steering Committee may consider such clarifications or additional information in evaluating a Proposal.

#### **Interviews**

The FOKL Steering Committee may during the evaluation period after the Closing Time and at its discretion invite some or all of the Proponents to either in person or via video conference to provide clarifications of their proposals. In such event, the FOKL Steering Committee will be entitled to consider the answers received in evaluating proposals.

#### **Negotiation of Contract and Award**

If the FOKL Steering Committee selects a preferred Proponent, then it will enter into discussions with the preferred Proponent to clarify any outstanding issues and attempt to finalize the terms of the proposal and Contract, including financial terms. If the terms and conditions of the Contract are acceptable to all parties, the parties will execute the Contract and the Project will commence.

## 10 General Conditions

This RFP is not a tender. No contractual relationship between FOKL and any Proponent shall arise from the submission of any Proposal. FOKL expressly reserves the right to:

- (a) negotiate or otherwise deal with, at any time, or in any sequence, any Proponent;
- (b) amend the RFP at any time; and
- (c) not accept any of the proposals or negotiate with any Proponent.

Proponents are solely responsible for their own expenses in preparing and submitting Proposals, and for any meetings, negotiations or discussions with FOKL or its representatives, relating to or arising from this RFP.

FOKL and its representatives 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 other matter whatsoever, incurred or suffered by any Proponent as a result of or related to this RFP, the preparation of a proposal, the evaluation of proposals, acceptance or rejection of any compliant or non-compliant proposal, negotiations for a Contract or the cancellation, suspension or termination of the RFP process, or other activity related to or arising out of this RFP.

Proponents should disclose any potential conflicts of interest they may have with FOKL or with the Kootenay Lake Community Values Study. FOKL retains the discretion to reject a proposal from a Proponent whose current or past interests may, in the opinion of FOKL, give rise to a conflict of interest in connection with this RFP or the Services.

## 11 Appendix A – Budget Template

Community Values Study Budget 2015-2016					
Expense Items	Details (ex. hourly rate and hours expected)	Phase 1	Phase 2	Phase 3	Phase 4
<b>Project Delivery Wages</b>					
Contractor wages for conducting a Community Values Study					
Subcontracts (GIS, graphic design, etc)					
<b>Promotional/Advertising Costs</b>					
Marketing, publicity, promotion, printing for Community Values Survey					
<b>Other</b>					
Travel costs for consultant	\$0.55/km				
Meeting expenses for 8x Community Values Consultation and 3x Lake Advisory Council meetings	venue rental, food, incentives for participation				
Other: Please specify					
<b>Subtotal - Expenses for Each Phase</b>					
<b>Total Study Expenses</b>					