

Request for Proposal

Vernon Pensioners Accommodation Society

Need and Demand Assessment and Site Feasibility Study

Issue Date: February 16, 2012

Closing: 2:00 p.m. Pacific Time on March 15, 2012

Please Email Submission to:

BC Non-Profit Housing Association
consulting@bcnpha.ca

Questions may be directed via email to:

Adrienne Denham, BC Non-Profit Housing Association
adrienne@bcnpha.ca



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1 PROJECT BACKGROUND

The Vernon Pensioners Accommodation Society (the Society) is a group of residents concerned about the needs of a growing population of seniors who require housing and support to be able to stay in Vernon. The Society, located at 3400 Coldstream Avenue, Vernon, BC, opened its doors in 1978 and has considerable expertise operating a 6-storey 113 suite complex.

In 2011, the Society received seed funding to advance their planning on the expansion of their affordable housing offerings. While the details of the project have not been fully articulated, the vision is that the Society can develop a new eleven story building with an additional 104 suites on property available to it. At this stage, the Society is seeking the assistance of a qualified consultant to assist them in assessing the feasibility of the site and the initial concepts, and if feasible to prepare a development plan that provides for the target clients.

Vernon is a city in the south-central region of British Columbia. Named after Forbes George Vernon, a former MLA of British Columbia, the City of Vernon was incorporated on December 30, 1892. The City of Vernon has a population of 35,944 (2006), while its metropolitan region, Greater Vernon, has a population of 55,418 (2006). Vernon is the largest city in the North Okanagan Regional District.

In 2010, Vernon was ranked the third best city in BC by MoneySense Magazine based on prosperity, affordable housing, lifestyle and weather, and was ranked number one in entrepreneurial spirit by the Canadian Federation of Independent Business. Greater Vernon is also a hot spot for retirees and was rated in the top six most popular locations in which to retire in North America. With a general population of just over 56,000 people, seniors make up 17.9% of the community compared to 13.8% for the rest of the Province. By 2015, Vernon's 65+ population is projected to increase to 19.5%.¹

Housing costs have risen considerably in Vernon since its last Official Community Plan in 2001. In 2006, the median price for an existing, not a new, single family home in Vernon was \$309,000 and by 2007 it was \$375,000. For a new single family home, the median price in 2006 was \$468,900 and \$529,000 in 2007. The estimated 2006 median sale price for townhouse was \$225,000, and for 2007 \$260,000 (a household income of \$71,000 would be required for median priced townhouse unit in 2007). In 2006, the median family income in Vernon was \$54,448 (compared to BC average of \$62,346). The 2006 average family income for a husband/wife family in Vernon was \$60,588 (compared to BC average of \$70,033). Clearly, housing costs present a significant challenge for more and more Vernon families.²

¹ "Senior's Housing in Greater Vernon: A Report to the City of Vernon's Affordable Housing Committee", November 2006.

² City of Vernon, Official Community Plan, Section 6.0 Housing, 2008.

The City of Vernon Affordable Housing Committee commissioned an “Attainable Housing Strategy” in December 2007. The Committee was tasked with studying the growing housing affordability situation in Vernon and to advise the City on courses of action it could consider. Many of the Committee’s findings were translated into the Vernon Official Community Plan, 2008.

As part of the Official Community Plan, Section 6.8 prioritizes that opportunities for appropriate housing options for seniors are identified, including within the City Centre District, and that opportunities are identified for the ability to age in place throughout residential neighbourhoods in the community. In addition, 55+ complexes should not be discouraged, but designed with due consideration for adjacent uses and the streetscape.

There are at least eleven non-profit housing societies operating in Vernon (identified members of the BC Non-Profit Housing Association); four of whom operate senior’s affordable housing complexes. These four societies manage 306 units of seniors housing.

2 PROJECT REQUIREMENTS

Scope / Project Plan and Deliverables

2.1 Initial Consultation

The consultant will plan an initial consultation with the Society to become familiar with the Society and the community and with a view to establishing the workplan for the project. The budget for this project is limited and consideration will be given to those proposals that identify fiscally prudent options to accomplish tasks including the use of email, internet, Skype, conference calls, video conferencing or any other innovations that help extend the resources available.

2.2 Needs Assessment (Phase 1)

The Vernon Pensioners Accommodation Society requires a Need and Demand Study that follows the template provided by the BC Non-Profit Housing Association and BC Housing and is found on both organizations' websites. The Society has conducted initial assessments, interviews and had experiential knowledge to support the continued progress of this development project and now wishes to invest in a formal Needs and Demand Study with a view to advancing the project. There is a wealth of existing research that should be incorporated into the Needs Assessment Template produced by BC Housing and BCNPHA Consulting. The template can be accessed at: www.bcnpha.ca/pages/housing-development/housing-development-templates-guides.php

2.3 Site Feasibility Study (Phase 2)

The consultant is to provide the Vernon Pensioners Accommodation Society with a feasibility assessment for the site available to the Society. The report should cover the following:

- A business plan that assesses the development potential of the selected site including, but not limited to:
 - The level of demand for non-market units (affordable and attainable);
 - The level of demand for market units;
- An analysis of the options available and the viability for a building with a mix of market, attainable and affordable units with a clear outline of the methodology and explanation of how the analysis was done; Is the proposed project financially viable, both capital and operating, with clear explanations about how the project could be viable? If not, what are the equity shortfalls;
- Identification of the key players in the project development and provide a course of action to establish, improve and maintain relationships with strategic partners;
- Propose a community consultation model that will be effective in this particular community;
- Identification of potential capital funding options; and
- An evaluation and recommendations for procurement options for the construction of the building.

3 REQUEST FOR PROPOSAL

3.1 Introduction

The Vernon Pensioners Accommodation Society invites qualified and experienced consultants to submit a proposal for this exciting project. The Society has an upset limit of \$8,800.00 for this project inclusive of all expenses, disbursements and taxes. The Society wishes to devote the vast majority of the funds to the feasibility study (Phase 2).

To ensure ease of proposal preparation and evaluation, proponents are required to submit their proposal using the Submission Form in Appendix 1. Proposals must be fifteen (15) pages or less, not including resumes.

3.2 Contact Information

Proponents are to provide specified contact information.

3.3 Company Profile

Proponents are to provide information on the history of the company, its size, vision, mission and purpose. The Profile should include the team involved in this project, what roles they will play, their credentials and the team structure.

Please clearly explain why the Society should retain your firm.

3.4 Experience

Proponents are to explain their experience working on similar projects with non-profit housing societies, and specifically any work experience gained in the North Okanogan Region.

3.5 Proposal

Please explain how you/your firm propose to undertake this project. Please explain the methodology proposed to accomplish each objective and a proposed workplan.

Please describe your expectations with regard to the roles and responsibilities of the Society.

The Society desires the engagement of community stakeholders so the consultant is encouraged to highlight your experience with innovative and effective ways to ensure community engagement is achieved.

3.6 Competency

Proponents will be expected to demonstrate experience and/or expertise with the following technical knowledge, attributes and skills.



3.6.1 Technical Knowledge

Needs Assessments

- Please explain your research and data analysis skills.
- Please list examples of Housing Need and Demand Assessments you have prepared and explain how they effectively addressed your client's housing issues.

Housing Knowledge

- Please describe your experience addressing housing issues, including the feasibility of sites, and highlight successful experiences that may benefit this project.

Funding and Financial Knowledge:

- Please explain and provide examples of your knowledge of and amount of experience with assessing the opportunity and challenges of funding arrangements for the development of affordable and attainable housing, especially seniors supportive housing.

Feasibility Analysis Experience:

- Please outline your approach to assessing the feasibility of developing the Society's site for housing.

3.6.2 Attributes

Leadership and Initiative

- Please explain how you exhibit leadership and initiative in the performance of consultant services.

Vision and Strategic Thinking

- Please provide an example relevant to this project where your vision/strategic thinking created value for the client.

3.6.3 Skills

Analysis and Critical Thinking Skills

- Please provide examples of your analysis and critical thinking skills and how they were used.

Consultation Skills

- Please provide an example of where you employed the type of consultation skills that will be used in this project.

3.7 Fees

Proponents are required to submit a fee proposal based upon the scope of work defined in the RFP and any adjustments recommended by the proponent.

Please calculate and list your project fee ensuring:

- Fee estimated for tasks outlined/anticipated
- Fee estimated for expenses: e.g. travel, accommodation, meals, communications and printing
- Total Taxes (HST should be excluded from the project budget)
- Total cost to complete the work including all taxes and disbursements

Please indicate your preferred Schedule of Payment.

3.8 References

References from three sources on similar projects are required.

3.9 Team Member Resumés

Résumé's of team members who are actively engaged in the project are to be included.

3.10 Supplementary Information

Supplementary information is not required but may be submitted.



4 EVALUATION PROCESS

4.1 Submission Evaluation

Proposals will be evaluated using the Evaluation and Scoring Matrix shown here.

	Weighting
Response to RFP	
Scoring sub-total	5
Company Profile	
Scoring sub-total	10
Experience	
Scoring sub-total	10
Proposal	
Scoring sub-total	15
Technical Knowledge	
Scoring sub-total	15
Skills	
Scoring sub-total	10
Attributes	
Scoring sub-total	10
Fee Proposal	
Scoring sub-total	15
References (only contacted if proponent is shortlisted)	10
Total	100

4.2 Interviews

Shortlisted proponents will be invited to an interview to further assess suitability as part of the evaluation process.

5 ADMINISTRATION

5.1 Freedom of Information

Submissions in response to this RFP will be treated in accordance with the relevant provisions of the Freedom of Information and Privacy Protection Act.

5.2 Expenses

Each consultant is responsible for bearing the costs, at their own expense, of preparing and submitting a proposal and any subsequent discussions with the Society. Neither the Society nor BCNPHA Consulting is liable to pay such costs and expenses or to reimburse or compensate a consultant under any circumstances.

5.3 Disclaimer

BCNPHA, in conjunction with the Society reserves the right at their sole discretion to cancel this RFP or not to select any submission.

5.4 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the RFP documents or having any doubts to the meaning or intent of any part thereof should immediately notify Adrienne Denham, by email at adrienne@bcnpha.ca. Any additional instructions or explanations will be posted on the BCNPHA website under the tab "RFPs and EOIs". No responsibility will be accepted for oral instructions. Addenda or correspondence issued during the RFP period shall be considered part of this document and become part of the final Contract documents.

5.5 Irrevocability of Proposals

Upon closing time all proposals become irrevocable. By submission of a proposal, the proponent agrees that should its proposal be deemed successful, the proponent will enter into a contract with BCNPHA or the Society.

5.6 Liability for Errors

While the Vernon Pensioners Accommodation Society and BCNPHA Consulting used considerable efforts to ensure an accurate representation of the information in this RFP, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Society, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

5.7 Agreement with Terms

By submitting a proposal the Proponent agrees to all the terms and conditions of this RFP. Proponents who have obtained the RFP must not alter any portions of the document, with the exception of adding information requested. To do so will invalidate the proposal.

5.8 Modification of Terms

The Vernon Pensioners Accommodation Society reserves the right to modify the terms of the RFP at any time at its sole discretion.

5.9 Submission Protocol

All inquiries regarding this RFP should be directed to Adrienne Denham, BCNPHA by email only at adrienne@bcnpha.ca at least 10 days before closing (March 1, 2012).

Responses to questions will be posted on the BCNPHA website at least 5 days before closing (March 8, 2012).

Proponents are hereby warned that any attempt to solicit individual members of BCNPHA and/or the Vernon Pensioners Accommodation Society and/or their appointed agents in regard to the award of the contract may jeopardize the favorable consideration of their proposals.

Proposals must be submitted by email as a PDF to consulting@bcnpha.ca. Emails must be within the gateway requirements of 10MBs. As such, any submission larger than 10MBs should be split into smaller chapters and labeled appropriately.

The subject line must read: RFP# 2012-02-16.

Proposals must be received no later than 14:00 Pacific Time on March 15, 2012.

Proposals received after the specified closing time will not be considered. Proposals submitted by facsimile, in person, by courier or mail will not be accepted. For further clarity, proposals will only be accepted as a PDF file sent to the email indicated above. All other forms of delivery will not be accepted.

We recommend you consider sending your proposals with a "delivery notice" and a "read notice" generated by your server. You will not receive a confirmation of receipt from either BCNPHA or the Society.

The Vernon Pensioner's Society and BCNPHA wish to thank all proponents for your efforts in responding to this exciting opportunity.

5.10 Language

All proposals are to be in English only.

APPENDIX 1: SUBMISSION FORM

BCNPHA Consulting RFP # 2012-02-16

**A Need and Demand Assessment and Site Feasibility Study
for the
Vernon Pensioners Accommodation Society**

1.0 Contact Information

Name of Firm	
Address	
Contact Person	
Telephone	
Cell	
Email	
Fax	
Website	

2.0 Company Profile

3.0 Experience

4.0 Proposal

5.0 Technical Knowledge

6.0 Attributes

7.0 Skills

8.0 Fee Proposal

9.0 References

10.0 Résumés