



Request for Standing Offer (RFSO)

FOR

Development Services for Non-market & Affordable Housing

SUMMARY:

The Town of Canmore is seeking qualified Proponents to provide consulting and project management services for the delivery of affordable housing, including land use and master planning; development financing and affordable housing grant environments; models for the provision of affordable housing; and project management and development consulting.

CLOSING DATE:	November 24, 2023
CLOSING TIME:	14:00:00 Mountain Time Zone
DATE ISSUED:	November 7, 2023
NOTE:	RESPONSES WILL NOT BE OPENED PUBLICLY

Request for Standing Offer - Development Services for Non-market & Affordable Housing



1. INSTRUCTIONS TO PROPONENTS

Proponents shall submit their response to the Town of Canmore by email to the attention of Whitney Smithers, General Manager of Municipal Infrastructure at whitney.smithers@canmore.ca.

Closing Date and Time: Submissions must be received not later than 14:00:00 hours Mountain Time Zone (Canmore local time) on November 24, 2023.

Electronic responses are to be in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission.

The Town of Canmore may in its sole discretion disqualify responses that do not meet the formatting and other criteria set out anywhere in this request.

Responses must be in English.

Each Proponent is solely responsible for ensuring that its response is received at the specified address (physical address or email address) by the specified closing date and time. Strict adherence to the closing date and time will be maintained, and unless the deadline date is extended by issue of Addendum, all responses received after this time and date will be returned unopened.

Contact Person:

For clarification or additional information, Proponents shall **only** contact the person listed below.

Whitney Smithers, General Manager of Municipal Infrastructure

Email: whitney.smithers@canmore.ca

2. PURPOSE OF THIS REQUEST

The Town of Canmore is issuing this Request for Standing Offer (RFSO) to establish a list of qualified Proponents that the Town may call up to provide consulting and project management services related to the delivery of affordable housing, including land use and master planning, development financing, affordable housing grants, funding environments, models for the provision of affordable housing, project management, and development consulting.

Proponents are invited to submit their qualifications for some or all of the requested services.

The Town will evaluate responses to this RFSO to select approximately two (2) Proponents as qualified for this work. The Town of Canmore reserves the right to select more or fewer Proponents, or no Proponent, in the Town's sole and unfettered discretion.

The Town intends to call up the Proponents who are qualified as a result of this RFSO to provide services as the need arises over a three-year period starting January 1, 2024 and ending December 31, 2027.

Before starting any work, the qualified Proponents will be asked to negotiate a standing agreement for consulting services to last for the duration of this period. Proponents will be expected to enter into

these agreements all terms of their responses to this RFSO that can be considered an offer to the Town, and to uphold these offered terms for the duration of the above period. These standing agreements must be non-exclusive in nature to allow the Town discretion to call the qualified Proponent of its choice for the specific services.

The total estimated value of the procurement being made through this RFSO for the services anticipated over the course of the period from January 1, 2024 to December 31, 2027 is approximately \$200,000. The value of specific call ups under this RFSO remains to be determined based on the qualification of Proponents and the confirmation of the Town of Canmore's specific projects. The estimated value of call ups of qualified Proponents under this RFSO is estimated at approximately \$10,000 to \$75,000.

The Town intends for this RFSO to serve as a fair, open, and competitive procurement for the full estimated value of the procurement as stated above over the period of time stated above. The Town may require one or more qualified Proponents on the list to provide quotes or proposals at the time of the call up according to its own policies and interests; however, shall not be required to do so. If more than one qualified Proponent is added to the list as a result of this RFSO, the Town will retain total discretion on calling up Proponents from the list. Proponents shall have no contractual expectation of any work, to any percentage to the work, to any order of call up, or to any competition on call ups.

3. SUBMISSION OF RESPONSES

Each Proponent shall make full disclosure of any actual or potential conflict of interest arising from any existing business or personal relationships with any of the following (each, a "Conflicted Person"): (i) any employee of the Town of Canmore; (ii) any member of the Town of Canmore Town Council (councillor); (iii) any board or committee member; (iv) any family member of any such employee, councillor or board/committee member; or (v) any business entity controlled by or otherwise not at arm's length to any one or more of any such employee, councillor, board/committee member or family member.

Without limiting the foregoing, details should be provided of any direct or indirect pecuniary interest of any Conflicted Person in the supply of the services contemplated by this RFSO.

Disclosure of any such actual or potential conflict of interest shall be made in writing with the Proponent's response.

This RFSO and any contracts subsequently entered into as a result hereof shall be governed by the laws of the Province of Alberta and the laws of Canada applicable therein. The courts of the Province of Alberta shall have exclusive jurisdiction over this RFSO and any contracts entered into as a result hereof.

Responses must be completed in accordance with the requirements of this RFSO.

No amendments or changes to responses will be accepted after the closing date and time.

4. LIMITATION OF LIABILITY

This is not a binding request for tenders. The laws of competitive bidding do not apply to this procurement. Participation in this RFSO process does not entitle any Proponent to be selected as the qualified Proponent or to be awarded any contracts.

By submitting a response to this RFSO, each Proponent accepts its terms and conditions. In addition, by submitting its response each Proponent waives all claims, rights, demands and the benefit of any provisions of any statute, rule of law or regulation that might adversely affect the rights of the Town of Canmore under this.

This request does not bind the Town to any call up procedure or to the distribution of work among multiple qualified Proponents. The Town shall have sole discretion to call up qualified Proponents from its list. The Town shall also have discretion to require subsequent proposals or quotations from multiple Proponents on the list. Standing agreements with qualified Proponents will be non-exclusive. Proponents shall have no expectations of any specific work until called to provide the services.

The Town shall have no liability to any Proponent for any direct, indirect, or special damages, arising out of or otherwise relating to this RFSO, the Proponent's participation in this RFSO process, or the Town of Canmore's acts or omissions in connection with the conduct of this RFSO process. This limitation applies to all possible claims by a Proponent, whether arising in contract, tort, equity, or otherwise, including, without limitation, any claim for a breach by the Town of Canmore of a duty of fairness or relating to a failure by the Town of Canmore to comply with the terms set forth in this RFSO.

The Town reserves the right to modify the terms of this RFSO or to cancel this RFSO at any time in its sole discretion.

Any cost incurred by the Proponent in the preparation of its response to this RFSO shall be borne solely by the Proponent. This includes any costs of attending any interviews or site visits that the Town of Canmore invites a Proponent to attend as part of the evaluation process.

5. ACCEPTANCE OR REJECTION

The Town of Canmore reserves the right to reject any or all responses. Without limiting the foregoing, the Town may reject any response that:

- is incomplete, obscure, irregular, unrealistic or noncompliant;
- has erasures, ambiguities, inconsistency or corrections; or
- fails to complete, or provide any information required by, any provision of this RFSO.

Further, a response may be rejected on the basis of the Town of Canmore's understanding of the Proponent's past record of work, its general reputation, its financial capabilities, the completion schedule or a failure to comply with any applicable law.

The purpose of the Town of Canmore is to obtain the most suitable responses from Proponents and to further the interests of the Town of Canmore and what it wishes to accomplish. Therefore, the Town of Canmore has the right to waive any irregularity or insufficiency or noncompliance in any response submitted and to accept the response or responses which it deems most favourable to its interests or to reject all responses and cancel the RFSO.

In addition to any rights identified elsewhere in this RFSO, the Town of Canmore reserves the right to:

- add, delete or change the terms of this RFSO at any time prior to the specified closing date and time;

- seek clarification of any Proponent's response, including consequential amendments, or any additional information from any Proponent;
- accept or reject, in whole or in part, any response without giving any reason;
- have any documents submitted by the Proponent reviewed and evaluated by any party retained by or acting for the Town;
- cancel the RFSO process without penalty at any time for any reason; and
- negotiate and enter into an agreement with any Proponent notwithstanding any noncompliance by the Proponent's response with any requirement of this RFSO.

The Town of Canmore is the sole and final judge with respect to the selection of any qualified Proponent as a result of this RFSO process.

All Proponents a response to this RFSO will be advised of the results of the RFSO process by email or regular mail. Please allow at least six weeks for responses to be evaluated by the Town of Canmore.

6. QUESTIONS AND CLARIFICATIONS

Procedural or technical questions must be submitted in writing and should include references to a specific section number where available.

Dependent upon their nature, comments or answers will be returned via email or through an addendum should the information be applicable to all Proponents.

Amendments to this RFSO will be valid and effective only if confirmed by written addenda. Addenda may be issued during the response period. All addenda become part of the agreement and receipt must be confirmed in the Proponent's submission. Any addenda documents will be issued by the same method that this RFSO was issued.

It is the Proponent's responsibility to clarify the interpretation of any item of this RFSO a minimum of 72 hours prior to the stated closing date and time by contacting the Town of Canmore's designate (as above).

7. CONFIDENTIALITY AND ACCESS TO INFORMATION

Confidentiality: All information including, without limitation, any technology of a proprietary or novel nature which is disclosed to a Proponent by the Town of Canmore or a third party as a representative of the Town of Canmore (which information, in addition to the confidentiality requirements hereunder, will be kept confidential by the Proponent in accordance with the terms of its disclosure by such third party) or which is otherwise obtained by the Proponent in connection with this RFSO process, other than that which is common knowledge or within the public domain, is the confidential property of the Town of Canmore and must not be disclosed by the Proponent, except to duly authorized representatives of the Town of Canmore. Such confidential information or property is not to be employed other than in connection with responding to this RFSO unless otherwise duly authorized by the Town of Canmore in writing. These confidentiality provisions will remain binding obligations on each Proponent following the conclusion of this RFSO process until the Town of Canmore reasonably determines that such confidential information referred to herein has become part of the public domain (other than by disclosure or use

prohibited herein) and releases the Proponent from its confidentiality obligation. This requirement does not prohibit any Proponent from complying with an order to provide information or data issued by a court or other authority with proper jurisdiction or to act to correct or report a situation which the Proponent may reasonably believe to endanger the safety or welfare of the public.

FOIP Acknowledgement: The Proponent acknowledges that any information or documents provided by it to the Town of Canmore may be released pursuant to the provisions of the *Freedom of Information and Protection of Privacy Act*. This acknowledgement shall not be construed as a waiver of any right to object to the release of any information or documents. The Town of Canmore acknowledges that a Proponent's response may contain information in the nature of a Proponent's trade secrets or commercial, financial, labour relations, scientific or technical information of or about a Proponent. Responses to this RFSO which are provided in confidence will be protected from disclosure to the extent permitted by law. The Town of Canmore is bound by the *Freedom of Information and Protection of Privacy Act* (Alberta), as amended from time to time, and all documents submitted to the Town of Canmore will be subject thereto. Each Proponent must identify appropriate parts of its response or other documents submitted to the Town of Canmore as confidential and specify what harm could reasonably be expected from its disclosure; however, the Town of Canmore may not be able to ensure that such parts will not be protected from access.

Disclosure to advisors: Proponents are advised that the Town of Canmore will, as necessary, be disclosing the responses on a confidential basis to its employees and advisors who have a need to know in connection with this RFSO process for, among other things, the purpose of evaluating and participating in the evaluation of the responses.

Personal Information: It is the responsibility of each Proponent to ensure that all personal information provided to the Town of Canmore with respect to the Proponent's personnel and their experience is supplied with the informed consent of such individuals and in accordance with applicable law. By submitting any personal information each Proponent represents and warrants that it has obtained the informed consent of the individuals who are the subject of such information to its collection, use and disclosure for purposes of this RFSO response. Also, such individuals are agreeing to the use of such information as part of the RFSO evaluation process, for any audit of the procurement process and for contract management and performance purposes.

Information Security: Qualified Proponents that provide information technology or web-related services to the Town of Canmore as part of their work on the Project shall be required to comply with the Town of Canmore's Information Security Standards as updated from time to time. These standards may overlap with and are additional to the functional and requirements of the specific Project. The Town of Canmore may require Proponents to demonstrate compliance with these standards as part of the review and evaluation of proposals. If not appended hereto, it is the Proponent's responsibility to request the Information Security Standards and access their ability to comply as part of responding to this request.

Ownership of responses: All responses submitted to the Town of Canmore become the property of the Town of Canmore and shall not be returned. They will be received and held in confidence by the Town of Canmore, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. Unqualified Proponent submissions will be kept as record until two years after the date of decision for the RFSO award.

8. PROPONENT PERFORMANCE

The Proponents may be evaluated throughout the course of service delivery in connection with any specific work or projects undertaken as a result of any agreement entered into between any Proponent and the Town of Canmore. The Town of Canmore may also conduct periodic reviews/assessments of any selected Proponent, taking into consideration, in addition to specific work related to the project undertaken by the Proponent, ongoing Proponent staff qualifications, experience, training, and staff changes. Any evaluation/assessment will be shared with the Proponent, with the goal of immediate and permanent resolution where concerns have been raised. The Town of Canmore reserves the right to remove from the list any selected Proponent who has been qualified by this RFSO process by way of written notice if, in the sole discretion of the Town of Canmore, based on any on-going or specific evaluation or assessment of the Proponent or its performance of any work, it is deemed to be in the Town of Canmore's best interests.

9. INSURANCE AND WORKERS' COMPENSATION BOARD REQUIREMENTS

Insurance: Qualified Proponents will be required to show evidence of the following types of insurance in amounts acceptable to the Town at the time of executing a contract for the goods or services being procured through this request:

- Commercial General Liability Insurance providing broad form coverage for property damage, personal injury and bodily injury including death, contractual liability, product liability, and other coverage as would be carried by a prudent person providing similar goods and services, and as the Town may require.
- Automobile liability insurance for owned and non-owned automobiles.
- Professional liability insurance, where applicable.

Cancellation: all of the Proponents' insurance policies shall include a clause that the policies will not be changed or cancelled without at least thirty (30) days notice.

Workers compensation insurance: Successful Proponents will be required to show evidence of worker's compensation Insurance covering the Proponent's workforce for the purpose of the Alberta Worker's Compensation Act and Worker's Compensation Board (WCB). Proponents shall provide the Town with their WCB number and a clearance letter from the WCB confirming that the Proponent's worker's compensation insurance is in good standing.

Lack of insurance: Failure to provide evidence of the required insurance at the time of executing contracts will entitle the Town in its sole discretion to retract any offers to qualified Proponents and to remove Proponents from the list. Respondents who will be unable to obtain the required insurance should not submit responses to this RFSO.

Supplemental criteria: Proponents who can show the required insurance at this time should include evidence of insurance with their response. The Town may consider the Proponent's current insurance and insurability as a supplemental evaluation criteria.

10. OVERVIEW OF WORK

BACKGROUND

Successive Council Strategic Plans have consistently prioritized affordability, climate action, mode shift, and complete communities. The current Council Strategic Plan has the following goals:

1. *Livability*: Canmore is a place where all residents can thrive.
2. *Environment*: Canmore is a recognized leader in managing human impact on our environment.
3. *Relationships*: Respectful, authentic relationships are the foundation on which our future success is built.

Canmore continues to struggle with housing accessibility and affordability for the local population. Canmore is on the frontlines of finding solutions to the housing crisis faced by many Canadian and North American communities. According to the 2021 census, Canmore has the highest wealth inequality level in the country. Due to its location within the same valley as the entrance to Banff National Park, there is extremely high cost for housing - driven by high demand and low availability. The development footprint of the Canmore community is further limited by the location in the Bow Valley, nestled amongst the Rocky Mountains. Responsibility for stewardship of this special place also demands that growth is restricted to not jeopardize vital environmentally sensitive areas. Taken as a whole, Canmore has a restricted footprint, highly sought-after housing, and prices that rival Toronto and Vancouver for rental and ownership opportunities.

To quantify the above, key factors impacting Canmore include:

- A growing proportion of non-owner-occupied dwellings – substantially higher than provincial average. Statistics Canada data indicates 8% of homes in Alberta are non-owner occupied compared to 26% of homes in Canmore being non-owner occupied.
- An increased proportion of households renting versus owning from 29% in 2011 to 34% in 2021.
- An increased proportion of households spending more than 30% of income on shelter costs.
- Monthly shelter costs have increased by 65% since 2006 and are 37% higher than the Alberta average. Shelter costs for owners include mortgage payments, property tax, and utilities and for renters include rent and utilities.
- Average property values have increased by 80% since 2006 and are twice as high as the Alberta average.

In response to the above, the Town of Canmore is taking action to provide affordable housing.

Specific objectives of the Town of Canmore to be pursued with the assistance of services procured through this RFSO include:

- Accelerate development of non-market and affordable housing
- Creative, bold approaches to housing delivery
- Further the Town's livability objectives
- Leverage capacity to deliver housing

SCOPE OF WORKTo help accomplish the above objectives, the Town is looking for qualified Proponents to deliver affordable housing on recently acquired provincial lands in the Palliser area of Canmore, and – where feasible – on selected Town-owned sites within Canmore.

The Town of Canmore anticipates the need for professional services in these areas:

1. Land use and master planning, design and delivery of Affordable Housing developments
2. Development financing, Affordable Housing grant/funding environments
3. Working knowledge of provincial Affordable Housing Partnerships & Asset Management Frameworks
4. Public/private partnerships and other models for provision of affordable housing
5. Project Management and Development Consulting

Support may be at any level within a project or program, from project/program planning to management/leadership. Requirements will range from smaller, distinct components of work to larger, all encompassing projects to support the Town's objectives.

Deliverables that the Town anticipates seeking from qualified Proponents include:

1. Program charter for delivery of Affordable Housing

The scope of this work includes:

- Program and conceptual phasing plan for site(s)
- Approach to funding commitments
- Proposed delivery methods/options
- Proposed operating model - the Town is open to various models, including but not limited to existing housing providers in the Bow Valley.

2. Oversight of development of recently acquired provincial lands in the Palliser area

In February 2023, the Town of Canmore requested the Province of Alberta advance the use of a 2.3 hectare parcel of provincially owned land for affordable and other non-market housing needs. The province has, through a reservation letter, consented to a transfer of the land to the Town for uses that support community livability and affordability. The successful Proponent will work with the Town to prepare an affordable housing project proposal that aligns with the community's affordable housing needs assessment; ensure provision of services that support complete communities; pursue adequate funding commitments for construction; and secure required permits and approvals.

3. Analysis and potential development of vacant Town land holdings

The Town recently completed a study of the development potential of selected Town-owned sites within Canmore. The successful Proponent will advise on the viability and feasibility of development on each site, to support decision making regarding future investments in housing. It will inform decisions on future investments in housing on Town owned land.

4. Consulting services for affordable housing strategy and policy

The successful Proponent(s) may be requested to provide recommendations to the Town related to refinement or development of affordable housing policies relative to other Town policy or bylaws.

RESPONSES AND EVALUATION

RESPONSE FORMAT

Electronic RFSO responses are to be on 8.5" x 11" size pages in PDF (.pdf) format only and all components shall be formatted and combined into one file that is inserted into the email submission. Responses to each section shall be marked with the corresponding letter and number (e.g. A1, A2, etc.).

RESPONSE COMPONENTS

Proponents are requested to submit information containing the following:

A. Mandatory Requirements:

A1 Signed signature and waiver sheet:

B. Proposal Content

B1 Company Profile (max 1 page)

Provide a profile and relevant firm history. Provide the location and address for the office from which the Proponent proposes services to the Town's requirements, and describe the ability of the Proponent to provide routine contract administration for projects without additional cost to the Town.

B2 Firm Expertise (max 1 page)

Provide a description of your firm's expertise with the provision of professional services to public sector and municipal organizations, and specifically for the services requested.

B3 Experience and Qualifications of Key Team Members (max 1 page per team member)

Provide an organization chart which identifies the Principal(s), Project Manager(s) and Key Team Members of the firm to be employed under this request. Resume(s) should be appended where appropriate. The Town reserves the right to verify information provided. The following information should be included for each team member:

- Name
- Proposed Role/Responsibility
- Education and Relevant Qualifications
- Years of Relevant Experience
- Examples of Relevant Project Experience

B4 Hourly Rates for Team Members

Include hourly charge-out rates for each team member.

B5 Relevant Approach and Methodology (max 2 pages)

Describe the general approach to be followed. The methodology should specifically demonstrate a process to deliver the services identified.

B6 Relevant Projects (max 1 page per project)

Describe up to three (3) projects completed in the previous four (4) years of a comparable scope and magnitude, preferably in the Municipal Sector. The Town reserves the right to verify

information provided. The following information should be included for each project description:

- Project Title
- Client name
- Role and type of services provided
- Approach to the project
- Status of Project (Ongoing or Complete)
- Duration of Contract (From/To)
- Total Project Budget and the dollar value of the Proponent’s contract
- Name and coordinates of client reference

EVALUATION PROCESS

Selection: Selection of the qualified Proponent(s) pursuant to this RFSO will be made on the basis of the Proponent’s written response and other factors germane to the Town of Canmore. The responses shall be evaluated based on the matrix shown below.

Evaluation Criteria	Evaluation
A. Mandatory Requirements	Pass / Fail
B1 Company Profile	10%
B2 Firm Expertise	10%
B3 Experience and Qualifications of Key Team Members	20%
B4 Hourly Rates for Team Members	10%
B5 Relevant Approach and Methodology	20%
B6 Relevant Projects	30%

Clarifications: The Town of Canmore reserves the right to seek from any/all Proponents any further clarification it may require on responses submitted pursuant to this RFSO.

Confidential evaluations: Evaluation scores and rankings are confidential, and apart from identifying the top-ranked Proponent(s) no details of the submission, score or ranking of any Proponent will be released to any Proponent.

Debriefing: The Town of Canmore will offer a debrief to unqualified Proponents on request.

Trade Agreements: This procurement is subject to the Canadian Free Trade Agreement (2017), Chapter Five – Government Procurement. The name of the Qualified Proponent(s) and value of the award(s) will be posted on the Alberta Purchasing Connection.

RFSO SCHEDULE

The following schedule has been established for this RFSO:

- RFSO issued on Town of Canmore website/Alberta Purchasing Connection Monday, November 6, 2023
- Last day to submit questions to Town of Canmore designate Monday, November 13, 2023
- Last day for Town of Canmore to issue final addendum Friday, November 17, 2023
- RFSO closing date Friday, November 24, 2023
- Issue notice to Qualified Proponent(s) Friday, December 8, 2023

SIGNATURE, ACKNOWLEDGEMENT AND WAIVER SHEET

By signing below, the Proponent hereby acknowledges and agrees as follows:

Prior to submitting its response to this RFSO, the Proponent has obtained from the Town of Canmore and thoroughly reviewed the entirety of the RFSO including all addendums hereto and documents incorporated by reference into this RFSO.

The Proponent has thoroughly reviewed, understands and agrees to be bound by all terms and conditions of this RFSO including those in all addendums hereto and documents incorporated by reference into this RFSO, unless otherwise waived by the Town of Canmore in its sole discretion and confirmed in writing. The Proponent hereby waives any rights or claims that it was not aware of any document incorporated by reference into this RFSO.

The Proponent’s representative signing below has the full authority to represent the Proponent in all matters relating to the RFSO and bind the Proponent to the terms and conditions of this RFSO.

Name of Business Entity	
Complete Address	
Phone	Mobile Phone
Fax	Email
Website	
Proponent Signature	Affix Corporate Seal:
Title	
Printed Name	
Date	

Notes to Signatories:

Incorporated Proponents should affix a corporate seal to the signature sheet. If an incorporated Proponent does not use a corporate seal, the Town of Canmore reserves the right to request documentation confirming corporate signing authority in the form of a director’s resolution, evidence of current registered officers, or other corporate record.

Unincorporated Proponents must submit proposals signed by an individual or legal entity with capacity to execute legal documents and bind the Proponent. The Town of Canmore reserves the right to request documentation confirming individual identities authority of the signatory to represent the Proponent.