
Project Title: Okanagan agriculture drought status outreach pilot
Vendor: Okanagan Basin Water Board (OBWB)
Solicitation Number: OBWB RFP 16-001
Issue date: June 29, 2016
Closing Date & Time: July 19, 2016; 15:00 local time
Consultant Selection: July 26, 2016

This Request for Proposal (RFP) consists of the main text and 2 Appendices:

Appendix 1: Receipt Confirmation Form
Appendix 2: Travel Instructions for Contractors

Receipt Confirmation Form

To ensure that you receive any updates or additional information being made available to prospective bidders, please complete the Receipt Confirmation Form (**Appendix 1**) and fax or scan/email it per the instructions on the form **by July 8, 2016**.

The contact person for questions about the RFP is:

Kellie Garcia, BSc, PAg
Okanagan Basin Water Board
Email: kellie.garcia@obwb.ca
Phone: 250-469-6321
Fax: 250-762-7011

DELIVERY OF PROPOSALS:

Proposals must be delivered either **via email (pdf format)**, or in **a single marked envelope**.

If submitting in hard copy format: include 3 bound copies and mail or courier to the address shown below.

Mail or Courier address for hard-copies of proposal:

Kellie Garcia
Communications and Planning Specialist
Okanagan Basin Water Board
1450 KLO Road
Kelowna, B.C.
V1W 3Z4

Email address for electronic proposals:

kellie.garcia@obwb.ca

Note: If the proposal is received after the closing time on the closing date, the proposal will not be considered and will be returned unopened.

1.0 KEY PROPOSAL INFORMATION

Contract Amount: The contract value will not exceed \$30,000 (not including GST).

The OBWB will work with the successful proponent to choose the water purveyors for the pilot, put together the steering committee, and cover pre-determined meeting costs as needed (e.g. catering). Meetings with the steering committee can be held at no cost in one of the OBWB meeting rooms in Kelowna. The proponent will be responsible for sending out invitations, managing RSVPs, and preparing and distributing handouts and meeting notes.

The proponent will be responsible for the graphic design and printing costs associated with the outreach materials. The proponent will not be responsible for dissemination of the outreach materials (this will be done by the water purveyors).

Term/Location: The contract will be in place until **December 31, 2017**. The location of the work is the Okanagan Basin in British Columbia.

Proposal Information:

- Each proponent is responsible for the risk and cost of preparing and submitting its Proposal. OBWB shall not be liable for any liabilities, costs, expenses, losses or damages incurred or suffered by any proponent by reason of its participation in this Request for Proposal process.
- The OBWB may request an interview (in Kelowna or by phone) with one or more proponents prior to awarding a contract. Costs for attending such an interview will be considered part of the cost of preparing a Proposal.
- The OBWB is not responsible for any information given to any proponent by anyone other than the contact person listed on page 1 of this RFP.
- All prices quoted must be valid for a period of 6 months from the date of the proposal, and must include all taxes except GST. GST must be identified as a separate line item.
- The OBWB reserves the right to reject any or all Proposals and to evaluate, at its sole and absolute discretion, any or all of the Proposals it receives on any basis it deems appropriate.
- The Proposal having the lowest price or any Proposal will not necessarily be accepted.
- Submission of a Proposal does not create any contractual or other legal obligation owing by OBWB to any proponent to evaluate, accept or reject a Proposal or to award or decline to award any contract to any proponent.
- Proposals received after the closing time on the closing date will be returned unopened.
- Proposals will be evaluated and selected by a technical steering committee, with no potential conflict of interest, appointed by project partners.

2.0 INTRODUCTION

Agricultural water – for irrigation, livestock watering, and crop protection – is essential to maintain the health and viability of food crops and animals in the Okanagan. Agricultural production is also one of the main economic drivers for the Okanagan region. Earlier snow melt and increasingly warm and dry summer conditions have made it important to share clear, accurate, and targeted information to the agriculture sector about the status of their water sources. The purpose of this project is to develop and test outreach materials and methods for communicating with the agriculture sector before and during drought about water supply and drought status.

2.1 Project Background

In 2015-2016, the *Okanagan Adaptation Strategies* planning process brought together the Okanagan's agricultural producers and local and provincial government partners to evaluate climate change impacts on local agricultural production, and to develop strategies and actions to address the associated challenges. A collaborative process to implement priority actions is now underway. The Okanagan Agriculture Drought Status Outreach Project will assist with delivering actions in the *Okanagan Adaptation Strategies*: to “create a consistent system for disseminating source-specific water supply information” and to “establish and implement sector-appropriate outreach mechanisms”.

In July 2015, the provincial government declared a Level 4 (hydrological) drought for the Okanagan. Purveyor responses across the region varied, with most implementing only basic watering restrictions. The mixed response partially reflected local circumstances; the Province's drought levels do not necessarily correspond to actual water levels in storage reservoirs, for example.

Agricultural representatives have indicated that producers were not necessarily aware of changes in the status of regional water levels in 2015, making it more difficult to suitably prepare and respond. They have emphasized the need for reliable information that is based on the state of their local water supply, so they can make appropriate water management decisions. If water users trust that information and notifications apply to their own water sources, this will likely enhance implementation of voluntary conservation measures in the future.

There is an opportunity to incorporate agriculture-specific outreach into purveyor-level drought planning processes currently underway in the Okanagan. Communication approaches will be identified and piloted through consultation with two Okanagan water purveyors and producers in their watersheds, with a follow up effectiveness evaluation.

Following the completion of the pilot, a summary of the results, along with a set of communication guidelines and sample outreach materials will be made available to the other water purveyors across the region. This will help facilitate the adoption of effective and consistent methods for communicating with agricultural water users about water status during drought throughout the Okanagan Basin.

A similar project is underway in the Cowichan Basin on Vancouver Island (<http://cvrd.bc.ca/1976/Drought-Information-for-Agriculture>) and can be looked at for ideas for the Okanagan agricultural outreach project.

2.2 Project Partners

2.2.1 Okanagan Basin Water Board

The Okanagan Basin Water Board (OBWB) was instituted in 1970 as a collaboration of the three Okanagan regional districts to provide leadership on water issues spanning the valley. Advised by a cross-disciplinary Council, the OBWB delivers programs to promote coordinated water management for long-term sustainable water supplies while supporting the capacity of jurisdictions throughout the Okanagan to meet their own water management goals.

Because of this valley-wide mandate, the OBWB is able to lead communication and coordination activities around drought, and to support local governments and other water suppliers with their drought management activities.

2.2.2 Okanagan Agricultural Adaptation Working Group

The Working Group includes representatives from the BC Grape Growers' Association, the BC Wine Grape Council, the BC Cherry Association, the Certified Organic Associations of BC, the BC Fruit Growers' Association, the Southern Interior Stockmen's Association, other industry associations with membership in the Okanagan, the Regional District of North Okanagan, the Regional District of Central Okanagan, and the Regional District of Okanagan Similkameen, the Ministry of Agriculture and Agriculture and Agri Food Canada. The Working Group participants provide input on the projects as they are developed and ensure that projects are designed and delivered in keeping with the *Okanagan Adaptation Strategies*. Participants also bring their organizational knowledge and perspectives and help to ensure that projects are coordinated with other local activities.

2.2.3 BC Agriculture and Food Climate Action Initiative

The BC Agriculture and Food Climate Action Initiative develops tools and resources to enhance agriculture's ability to adapt to climate change. In the spring of 2012, the Initiative completed a climate change risk and opportunity assessment for the BC agriculture sector ([Adaptation Risk & Opportunity Assessment report series](#)). Based on the findings of the Assessment, a series of in-depth regional plans – *Regional Adaptation Strategies* – are now being developed and implemented across BC. This Okanagan Agriculture Drought Status Outreach Project fulfils a priority action identified in the *Okanagan Adaptation Strategies*.

2.2.4 Government of British Columbia

Consistent with the Growing Forward 2 agreement with the government of Canada, and the BC Jobs Plan Agri-foods Strategy, the BC Ministry of Agriculture has the objectives of improved adaptive capacity and/or sustainability of the sector, of regions and of commodity groups, along with enhanced economic growth, employment, productivity and competitiveness.

The Government of British Columbia's climate change adaptation strategy can be accessed at the following link: http://www.livesmartbc.ca/attachments/Adaptation_Strategy.pdf.

The strategy has three elements:

1. build a strong foundation of knowledge (including planning tools and engaging climate science);
2. make adaptation part of Government's policies, legislation, regulations and decision-making; and
3. assess risks and implement priority adaptation actions in sectors sensitive to climate change (including agriculture).

2.3 Project Objectives

The objectives of the project are to:

- develop effective outreach methods and materials for purveyors to provide timely local water source information and updates to agricultural water users during drought; and
- prepare standard guidelines for communicating with agricultural water users and provide sample outreach materials that can be modified and used by purveyors basin-wide.

2.4 Project Activities

The main activities of the project are:

- work with two Okanagan water purveyors and conduct research to determine suitable outreach approaches (including both communications mechanisms and content to be included) for providing water source information and updates to the agricultural sector;
- work with a Steering Committee of the water purveyors and key producers in their watersheds to gather input on the outreach approaches and revise as needed;
- pilot outreach approaches in the 2017 production season;
- evaluate the efficacy of the outreach approaches and revise as needed;
- prepare template guidelines and sample outreach materials to be modified and used by other water purveyors; and
- prepare a final report that summarizes project results, including consultation process used, and compiles the communication guidelines and sample outreach materials.

3.0 DELIVERABLES AND SCHEDULE

Deliverables and dates are listed in the table below. This is intended as a minimum list - proponents can propose additional steps and deliverables.

Project Deliverables

The main project deliverables are:

- communication strategies and outreach materials for two pilot Okanagan water purveyors;
- template outreach materials and communication guidelines for use by other Okanagan purveyors (attach to final report);
- summary of effectiveness evaluation (attach to final report); and
- final report.

Drafts of all deliverables will be reviewed by the Steering Committee, as indicated in the schedule below.

Required deliverables/milestones and delivery dates

Deliverable/Milestone	Delivery Date
Contract awarded	July 26, 2016
Start-up meeting with OBWB	August 2, 2016
Background research and initial consultation with water purveyors	August 2016
Draft outreach approaches with pilot purveyors	September-October 2016
Meet with Steering Committee to gather input on drafts	November 2016
Revise outreach approaches based on feedback	December 2016
Test outreach approaches	April-September 2017
Meet with Steering Committee to evaluate efficacy of outreach approaches and prepare summary of evaluation (include in appendix of final report)	November 2017
Revise water purveyor outreach approaches based on feedback and submit final documents	November 2017
Prepare draft project report, including draft communication guidelines and template outreach materials (include in appendix of final report)	November 2017
Submit final report	December 2017

4.0 PREFERRED QUALIFICATIONS OF THE PROPONENT

The successful proponent will have:

- minimum five years professional experience managing, planning, developing, implementing and reporting on outreach and communication processes;
- demonstrated ability to bring diverse interests to a common understanding;
- ability to work both independently and in a collaborative team environment; and
- knowledge and understanding of drought and/or the agricultural sector in the Okanagan.

5.0 PROPOSAL EVALUATION

5.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Criteria
The proposal components must be received as per the submission instructions, at the identified closing location before the specified closing date and time.
The proposal must be in English.

5.2 Other Evaluation Criteria

Proposals meeting all of the mandatory criteria will be further evaluated by considering the following additional evaluation criteria.

Evaluation Criteria	Examples of questions the evaluators will consider	Weight (%)
Understanding of the requirement	Does the proposal clearly demonstrate a thorough understanding of the background to the study, and of its importance?	15
	Does the proposal clearly demonstrate a thorough understanding of the technical requirements of the study?	
Qualifications and experience of the proponent	Does the proponent have clearly demonstrated experience in outreach and communications, including in the design and printing of outreach materials?	15
	Does the proponent have current knowledge of outreach tools that would be suitable for the agricultural sector?	
	Does the proponent have a demonstrated ability to communicate with purveyors and producers?	
	Does the proponent have appropriate resources, including office space, equipment, software, hardware, and administrative systems to complete the project?	
Qualifications and experience of the individual team members	Do each of the proposed team members have significant and clearly demonstrated experience in the roles to which they have been assigned (including the Project Manager)?	15
	Are sufficient backup personnel resources available?	
Project management approach	Is the project management approach appropriate for the scope of the project?	5
	Does the proposed approach give confidence that the outcomes will be successfully delivered?	
	How will sub-consultants (if any) be managed?	
	Does the proposal provide confidence that the project can be delivered on time and on budget?	
Approach, methodology, and description of deliverables	Is the proposed approach robust and likely to succeed?	25
	Is the approach efficient?	
	Is the methodology sound and likely to deliver the desired outcomes?	
	Can the tasks be completed within the required time frame?	
Overall proposal quality	Is the format consistent with RFP requirements?	15
	Is the writing (e.g. paragraph and sentence construction, grammar) excellent?	
	Does the content convey confidence that the desired project outcomes will be achieved?	
Cost	Is the cost consistent with RFP requirements?	10
	Is the cost appropriate for the scope of work outlined in the RFP?	

Evaluation Criteria	Examples of questions the evaluators will consider	Weight (%)
	Is the distribution of time between the various team members appropriate? Is there good value provided for the quoted cost? What is the cost?	

Note that the example questions listed in the above table are intended only as a guide to proponents. The list of questions is not exhaustive and may not constitute the sole criteria by which proposals are evaluated.

It is expected that the quality of the responses to this RFP will be high. In order to discourage unnecessary effort, it is advised that you do not submit a proposal unless you believe you will score highly on each of the above-noted evaluation criteria.

6.0 PROPOSAL FORMAT AND CONTENT

The proposal should include the following, preferably in the order and format described below:

- **Transmittal letter** – Identify the RFP name and number, and provide the Proponent’s contact information.
- **Title page** – Identify the RFP name and number, and provide the Proponent’s contact information.
- **Executive Summary**
- **Table of Contents**
- **Background and Project Understanding** – State your understanding of the project purpose and scope.
- **Approach and Methods** – Describe the approach, tasks, and methods you will take to ensure that the project is successfully delivered. Clearly identify creative or innovative approaches or methods that will be used. State any unique benefits to the proposed approach or methods.
- **Deliverables** – Describe the deliverables and explain how they achieve the objectives of the study.
- **Schedule** – Provide a project schedule, with clearly identified project milestones and deliverables.
- **Proposed Team and Structure** – Identify a study team and project management structure, and describe how the proponent will ensure that the project is delivered on time and on budget.
- **Individual and Corporate Experience** – Provide a clear statement of the relevant qualifications and particular strengths of the proponent and the individuals being proposed, specifically as they relate to the requirements of this project.
- **References** – Provide name and contact information for three references who can verify relevant qualifications and experience.

- **Cost estimate** – Detail the cost estimate in a matrix:
 - list fees and disbursements separately,
 - indicate hourly rates for each individual,
 - indicate the number of hours for each individual for each task and in total, and
 - separate GST as a single line item.

Expenses incurred for travel and accommodation will be reimbursed at the rates provided in **Appendix 2**.

**Appendix 1:
Receipt Confirmation Form**

**REQUEST FOR PROPOSALS No. OBWB RFP 16-001
Okanagan Basin Water Board**

For further information about this Request for Proposals, please return this form
via email or fax **on or before 15:00 hrs, July 8, 2016** to:

Kellie Garcia
Okanagan Basin Water Board
Fax: (250) 762-7011
Email: kellie.garcia@obwb.ca

COMPANY: _____

STREET ADDRESS: _____

CITY: _____ COUNTRY: _____

MAILING ADDRESS, IF DIFFERENT: _____

FAX NUMBER (____) _____ PHONE NUMBER (____) _____

CONTACT PERSON: _____

TITLE: _____

EMAIL: _____

Appendix 2

TRAVEL INSTRUCTIONS FOR CONTRACTORS

General:

“Travel Status” with respect to a contractor means the contractor is at least 32 kilometres away from the contractor’s usual work location, on business related specifically to this contract, with the approval of the Contract Monitor. Travel status begins and ends at designated departure and return locations determined by the officer administering the contract.

The travel expenses described below will be paid when:

- travel is needed in fulfilling services contracted;
- provision for travel expense has been included in the contract; and
- the travel has been authorized by the officer administering the contract.

All other contractor travel, not meeting the description of ‘travel status’ above, must be approved by the contract expense authority and written into the contract before the additional travel expense will be reimbursed.

The most economic travel arrangements should be used consistent with the time available to conduct the business.

Travel expenses will be reimbursed where the invoice is supported by a statement showing the accumulation of expenses for the trip under the various categories and to which original receipts, as required, are attached.

Notwithstanding your status as an independent contractor, expenses incurred on out-of-province travel will only be reimbursed when specific provision is made in the contract and prior approval for the travel has been obtained from the appropriate authority by the officer administering the contract.

Private Car Transportation:

An allowance of 50¢ per kilometre for the use of the contractor’s private vehicle may be claimed. It is intended to cover costs of gas and maintenance.

Reimbursement for parking essential to the business may be claimed. Receipts are required, while parking machine tickets marked with the total paid and signed by the claimant are acceptable.

Owners are responsible for ensuring they have adequate insurance to cover business use.

Public Transportation:

Receipts are required for reimbursement of actual expenses incurred through the use of buses, airlines (most economical fare), ferries, taxis, rental cars and tolls.

Meal Allowance:

The maximum daily amount that may be claimed for meals is \$47.00. Depending on the time of departure or arrival, the following partial day rates may be claimed.

Partial Day Rates

Breakfast (7 a.m.)	\$11.50	B&L	\$24.75
Lunch (12 noon)	\$13.25	L&D	\$35.50
Dinner (6 p.m.)	\$22.25	B&D	\$33.75

Meals which are paid for from OBWB or public funds and provided free to contractors acting on business related to this contract must not be claimed.

Accommodation:

In making a hotel selection for your travel:

- Select the most cost effective hotel that meets your business requirements considering the basic room cost and any supplementary costs for internet access, parking or other costs.
- Please note: bed and breakfast properties are included. Where breakfast is included, your reimbursement claim should not include a breakfast component.

You will be reimbursed for the full amount of the hotel's base rate, plus other applicable business expenses; e.g. parking, internet access for business use only.

Original receipts and proof of payment are required. When private accommodation is used, a maximum of \$30.00 per night may be claimed.