



# REPORT

**TO:** Lorraine Hilton  
Chief Administrative Officer

**Date:** November 26, 2019  
**File:** 6520.21

**FROM:** Laura Beckett  
Municipal Planner

**RE:** **AWARD OF CONTRACT FOR SOUTH HIGHLANDS LOCAL AREA PLAN**

To Council  
December 2, 2019

## PURPOSE

To recommend to Council awarding a consulting contract for the South Highlands Local Area Plan.

## STRATEGIC PRIORITY

This project is a Strategic Priority.

## BACKGROUND

In accordance with the [project's terms of reference](#) and [overview](#), staff conducted a request for proposals process that was advertised on BC Bid. It yielded no applicants. As a result, staff sought out firms interested in participating in a "response to questionnaire" process. Three responses were received from: Barefoot Planning & Design; Modus Planning, Design & Engagement; and Urban Systems.

Their submissions were evaluated on the following criteria:

Criteria/Questions	% Value
Fit with Highlands <ul style="list-style-type: none"> <li>How will you obtain input from residents who are typically not involved, along with other quiet stakeholders?</li> <li>How will you gain the trust of this community?</li> <li>How will you gain the trust of the Task Force?</li> </ul>	20
Process <ul style="list-style-type: none"> <li>What are your key successful tactics/strategies/approaches in designing, implementing, leading and carrying out to completion the creation of a local area plan for a small community?</li> <li>How will you incorporate sustainability and the climate emergency with respect to long term land use policy into the public engagement process?</li> </ul>	20
End Product <ul style="list-style-type: none"> <li>How will you turn the results of the public engagement process into practical local government policy?</li> </ul>	15
Project Timelines <ul style="list-style-type: none"> <li>When are you able to start?</li> <li>Aware that the District is starting later than the planned November 2019, how would you alter the "Project Overview"?</li> <li>Realistic completion Jan 2021?</li> </ul>	25
Value for Budget <ul style="list-style-type: none"> <li>Rough Budget Phase 1</li> <li>Rough Budget Phase 2 – Small geographic area</li> <li>Rough Budget Phase 2 – Large geographic area</li> </ul>	20
<b>TOTAL</b>	<b>100</b>

All three submissions scored well, with the one from Barefoot Planning & Design scoring the highest. This was primarily due to the team's extent and depth of engagement experience for those most involved in the project, experience with creating local area plans, and their presence for the Task Force meetings.

### **DISCUSSION**

Please find a high level overview of Barefoot's proposal. A more detailed proposal and budget will be attached to the contract to be monitored at the staff level.

The details of Phase 2 are necessarily undefined because Phase 1 will define them.

### **Financial**

- As part of the original scoping sheet for this project, staff very roughly estimated up to \$75,000 for the project. The total cost estimated by Barefoot is up to \$90,000. This estimate takes into consideration the possibility that the geographic area for the local area plan could be larger instead of smaller. If the staff recommendation is adopted, the additional funds required for this project will be included in the Draft Financial Plan.

### **RECOMMENDATION**

That staff be authorized to enter into a contract with Barefoot Planning & Design for up to \$90,000.00 (excluding GST) to prepare the South Highlands Local Area Plan, and that the Mayor and Corporate Officer be authorized to execute the contract on behalf of the District.

Respectfully submitted,

Concurrence



Laura Beckett, MURP, MCIP, RPP  
Municipal Planner

Lorraine Hilton,  
Chief Administrative Officer

*Attachment:*

*Proposal from Barefoot Planning & Design, dated November 13, 2019*

# PROPOSAL

To: District of Highlands  
Att: Laura Beckett  
From: Evan Peterson – Barefoot Planning+Design  
Date: November 13, 2019  
**Re: South Highlands Local Area Plan**

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## INTRODUCTION

This brief proposal outlines the high-level services, schedule, and fee estimate for the development of the South Highlands Local Area Plan by Barefoot Planning+Design, in partnership with TownSquare Planning.

We are excited about working with the District and the community on this important and challenging process.

## PROJECT UNDERSTANDING

We understand that there has been a focus on the area designated as the “Highlands Commercial Industrial Gateway Area” in recent years, and that this ultimately exposed the need to develop a community vision and local area plan for the South Highlands area.

Moreover, we understand that this project will require four primary tasks across two project phases, as outlined in the Project Terms of Reference:

- **Phase 1 – Task Force Meetings & Phase 2 Terms of Reference**
  - Geographically-defining the South Highlands area
  - Creating an outline of contents and Terms of Reference of the Local Area Plan
  - Developing an LAP process to present and have approved by Council
- **Phase 2 – Develop Local Area Plan**
  - Carry out the approved LAP process and develop the plan document



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## PROPOSED WORK PLAN & SCHEDULE

The following high-level work plan is proposed to be undertaken:

### Phase 1 – December 2019 to March 2020

- **Project Startup – December**
  - Startup meetings
  - Background Analysis
- **Task Force Meeting #1 (1.5-2 hours) – December**

- Introduce project
- Discuss study area boundary
- **Task Force Meeting #2 (1.5-2 hours) – January**
  - Finalize study area boundary
  - Discuss outline of LAP contents
- **Task Force Meeting #3 (1.5-2 hours) – February**
  - Finalize outline of LAP contents
  - Finalize Phase 2 consultation process
- **Task Force Meeting #4 (1.5-2 hours) – February/March**
  - Finalize Terms of Reference for Phase 2

Final deliverable for Phase 1 will be a Final Report that includes the following:

- Brief overview of Phase 1 process
- Map of recommended LAP boundary, including rationale
- Recommended Terms of Reference for Phase 2, including:
  - Objectives and Deliverables for Phase 2
  - Content outline for LAP
  - Recommended engagement plan

### Phase 2 – March 2020 to Fall 2020

- **To be determined based on Phase 1 outcomes**
  - To include baseline analyses, public and stakeholders, engagement, task force meetings, plan development, etc.

### FEE PROPOSAL

We propose the following fees and fee breakdown for Phases 1 and 2

- **Phase 1**
  - \$20,000, excluding GST and expenses
  - Scope: work plan as described above
- **Phase 2** (details TBD)
  - \$70,000, excluding GST and expenses
    - Scope: anticipated work plan to develop LAP
    - This includes a maximum of \$20,000 for subcontractors, such as Transportation, Engineering, etc
- **Expenses**
  - All project expenses (e.g., venues, printing, supplies) will be covered by the District, unless otherwise agreed upon
  - Our team is local and will not charge for travel
- **District Support**
  - The above fees assume that the District would provide a reasonable level of administrative and planning support



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throughout the project, including booking, advertising/ marketing, and helping to organize all community engagement events and task force meetings.

Note that the nature of this project will require the to-be-determined scope for Phase 2 to be defined within the given project budget. Any unanticipated increases in scope will require discussion about additional budget.

## PROJECT TEAM

The following personnel are proposed as the project team for Phase 1 and as the core team for Phase 2 of this project.

- **Evan Peterson**  
*Principal, Barefoot Planning + Design*  
Role: Project Lead, Engagement Lead, Plan Development Lead
- **Jennifer Kay**  
*Principal, TownSquare Planning*  
Role: Senior Advisor, Task Force Co-Facilitator, Engagement Support, Policy Development Support
- **Devon Miller**  
*Principal, Origin Sustainable Design + Planning*  
Role: Sustainability Lead and Advisor, Engagement Support
- **Carrie Hubka**  
*Graphic Designer, Barefoot Planning + Design*  
Role: Graphic Design, Admin Support

## CLOSING

In closing, we look forward to working with the District and the community on this project. This project represents so much of what we are passionate about in community planning, engagement, and sustainability consulting.

Should you require any additional information, then do not hesitate to contact the undersigned.



**Barefoot Planning & Design**

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Sincerely,

Evan Peterson

Principal

Barefoot Planning