



## Request for Expression of Interest

IN RESPECT OF CONSULTANT SERVICES TO REVIEW  
SHARED COMMON AREAS IN MIXED TENURE SOCIAL  
HOUSING PROJECTS

RFEOI No. PS20190503

Issue Date: April 1, 2019

Issued by: City of Vancouver (the "City")

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RFEOI No. PS20190503 QUALIFICATIONS FOR  
CONSULTANT SERVICES TO REVIEW SHARED COMMON AREAS IN MIXED TENURE SOCIAL HOUSING  
PROJECTS

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REQUEST FOR EXPRESSIONS OF INTEREST NO. PS20190503 (the "RFEOI")  
QUALIFICATIONS FOR CONSULTANT SERVICES TO REVIEW SHARED COMMON AREAS IN MIXED  
TENURE SOCIAL HOUSING PROJECTS

EXPRESSIONS OF INTEREST WILL NOT BE PUBLICLY OPENED.

NOTES:

1. An Expression of Interest should be submitted by email prior to 3:00pm on April 23, 2019 (the "Closing Time") in accordance with the following:
  - Subject of the file to be: PS# - Title - Vendor name.
  - Document format for submissions:
    - Schedule 1-5 in PDF format, - 1 combined PDF file, and;
    - Any additional attachments if required.
  - Zip the files to reduce the size or email separately if needed.
  - Send your submissions to [Bids@vancouver.ca](mailto:Bids@vancouver.ca); do not deliver a physical copy to the City of Vancouver.
  - If you did not receive an automated email within few minutes, check your junk folder first, and then contact [Purchasing@vancouver.ca](mailto:Purchasing@vancouver.ca).
  - Submitting the files via Drop box, FTP, or similar programs, is not acceptable.
2. Each Expression of Interest must be marked with the vendor's name and the RFEOI title and number.
3. "Vancouver Time" will be conclusively deemed to be time in the City of Vancouver, as indicated in the electronic timestamp the Proposal receives upon delivery to the email address specified herein, which is in turn synchronized to Network Time Protocol (NTP) provided by the National Research Council of Canada adjusted to local Pacific Time Zone.
4. DO NOT SUBMIT EXPRESSIONS OF INTEREST BY FAX.
5. All queries related to this RFEOI should be submitted in writing to the attention of:

Jim Lowood

Email: [jim.lowood@vancouver.ca](mailto:jim.lowood@vancouver.ca)

(the "Contact Person")

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## SECTION 1 GENERAL INFORMATION

### 1.1 Introduction

The City of Vancouver (the “City”) is seeking expressions of interest (“Expressions of Interest”) from consultants to review mixed tenure social housing projects and to explore the implications and outcomes of separate versus shared common areas.

### 1.2 Background

Inclusionary zoning is one of the main delivery models for social housing in Vancouver, often resulting in air space parcels (“ASP”) being transferred to City ownership, set within a strata or market rental development, essentially acting as separate buildings. Traditionally, spaces have been kept separate in an effort to keep costs down for the non-profit operator, and minimize management fees or shared expenses. The non-profit spaces are also designed with durable materials, with both longevity and replacement costs in mind. Where social housing is delivered through inclusionary zoning as an air space parcel, the City takes ownership of the parcel before being leased to a non-profit operator who is responsible for its ongoing operation and maintenance.

With the exception of some shared access to the overall building’s service infrastructure as well as pedestrian and vehicular access, and the building envelope, practice has been to maintain a separate contiguous air space parcel. This consists of separate entrances, elevators, garbage/recycling room, utility room with separate mechanical and electrical systems and metering, as well as indoor and outdoor amenity spaces (shared only by the tenants within the air space parcel). These spaces have typically been kept under separate ownership to ensure clear boundaries in operating and maintenance costs for the social housing operator. Sharing amenity spaces could expose social housing operators to higher costs which are associated with premium interior finishes and amenities that may be provided in market housing. There are few existing developments with some aspect of shared amenity space.

The issue of having separate entrances for social housing and market housing co-located in the same building has been raised by the media, some members of the public and members of Vancouver City Council (“Council”). Media coverage on the issue of separate entrances, has used the term ‘poor door’, and outlined public concerns of stigmatization and isolation of the social housing residents, in place of a desired mixed-income community. As well, recently an applicant for an inclusionary project was advised to consider combining the outdoor play areas for use by all building residents.

The creation of shared amenity spaces can be seen as an ideal social objective but it is understood that implementation can be challenging due to financial issues such as cost sharing and maintenance around co-owned common amenity spaces and varying site constraints. It is commonly felt that exterior spaces are more easily shared than interior spaces, as the latter poses a number of financial concerns.

### 1.3 Project Understanding

The City is seeking a consultant or consultant team (“Consultant”) to review and understand the operational, financial, legal and social implications of designing mixed-tenure projects with shared entrances, common areas, and service infrastructure for non-profit housing operators.

The Consultant’s work will cover the following:

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- a) Review best practices in municipalities outside of Vancouver on the topic of shared and separate common areas in mixed-tenure buildings and build upon current research project on this topic completed April 2019;
- b) Analyze current City of Vancouver practices and existing projects through stakeholder interviews (non-profit operators, strata, property managers, developers, etc.) and research; and
- c) Make recommendations for future mixed-tenure social housing projects, including the feasibility of suggestions and feedback put forward by the stakeholders.

Through this work, the City aims to understand the implications of shared and separate spaces in mixed-tenure projects with social housing units, with regards to:

- a) Financial costs including, ongoing operational costs, initial upfront costs for both developers and non-market housing operators and other stakeholders;
- b) Operational concerns such as safety, maintenance, ability to program space, etc.;
- c) Legal considerations such as potential liabilities for non-profit housing operators, strata, rental property managers, etc.; and
- d) Social considerations including the ability to access and control spaces, tenant interactions, etc.

Please note the Consultant's work should consider the prioritization and trade-offs of the above implications as well as the relative importance of these issues. The size (number of units) of the social housing air space parcel should also be considered when determining implications.

#### 1.4 Sustainability

1.4.1 The City's Procurement Policy, Ethical Purchasing Policy and related Supplier Code of Conduct found at <http://vancouver.ca/doing-business/selling-to-and-buying-from-the-city.aspx> align the City's approach to procurement with its corporate social, environmental and economic sustainability values and goals. They evidence the City's commitment to maximize benefits to the environment through product and service selection, and to ensure safe and healthy workplaces, where human and civil rights are respected. Each City vendor is expected to adhere to the supplier performance standards set forth in the Supplier Code of Conduct. The Ethical Purchasing Policy shall be referred to in the evaluation of Expressions of Interest, to the extent applicable.

1.4.2 Vendors are to provide environmentally sensitive products or services wherever possible. Where there is a requirement that a vendor supply materials, and where such materials may cause adverse environmental effects, the vendor should indicate the nature of the hazard(s) in its Expression of Interest. Furthermore, each vendor is asked to advise the City of any known alternatives or substitutes for such materials that would mitigate such adverse effects.

#### 1.5 RFEOI Process

1.5.1 Interested parties ("Respondents") are required to respond to this RFEOI in accordance with the instructions set forth in this RFEOI.

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- 1.5.2 Expressions of Interest are being requested in order to afford the City of Vancouver the opportunity to gauge such responses and evaluate Respondents' expertise, so that the City may then conduct a more formal procurement process, tailored (as determined in the City's discretion) to the responses received and limited, should the City so determine, to all or some of the RFEOI Respondents. The City currently anticipates that it will carry out a Request for Proposal and that the same will be released to multiple qualified Respondents during the period stated in Schedule 1 – Description of Requirements.
- 1.5.3 Notwithstanding the foregoing, the City may, as a result of the RFEOI, decide to proceed directly to negotiate a contract with an outstanding Respondent (or the sole qualified Respondent, if there is only one).
- 1.5.4 The RFEOI process is aimed at encouraging businesses with the required level of expertise to participate. Respondents should ensure that their Expressions of Interest demonstrate expertise in conducting research in the lower mainland on social housing projects.
- 1.5.5 Any potential Respondent is requested to refrain from submitting an Expressions of Interest if it is not willing to submit bona fide proposal or tender in relation to the subject matter of the RFEOI if the City invites the Respondent to participate in a request for proposals or invitation to tender.
- 1.5.6 If a potential Respondent believes that the City may be unable to select it due to a conflict of interest, but is uncertain about this, the potential Respondent is urged to contact the individual named on the cover page above as soon as possible with the relevant information so that the City may advise the vendor regarding the matter.
- 1.6 **RFEOI Documents**
- 1.6.1 This RFEOI consists of:
- (a) the cover page hereof and sections 1 through 6 hereof; and
  - (b) schedules as follows:
    - (i) Schedule 1 – Description of Requirements;
    - (ii) Schedule 2 – Letter of Expression of Interest;
    - (iii) Schedule 3 – Format for Expressions of Interest;
    - (iv) Schedule 4 – Certificate of Existing Insurance; and
    - (v) Schedule 5 – Declaration of Supplier Code of Conduct Compliance.
- (collectively, the "RFEOI Documents")
- 1.6.2 If the City of Vancouver issues any amendments or addenda to the RFEOI Documents, such amendments or addenda will form part of the RFEOI Documents. It is the sole responsibility of all Proponents to check the City's website at: <http://www.vancouver.ca/fs/bid/bidopp/openbid.htm> regularly for amendments or addenda to the RFEOI Documents, including questions and answers posted by the City in relation to this RFEOI.

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**SECTION 2 QUALIFICATION CRITERIA**

**2.1 General**

The City currently expects to base its decision with respect to each Respondent's qualification (or not) to participate in a Request for Proposal on (i) whether the statement of qualifications submitted by the Respondent as part of its Expression of Interest (its "Statement of Qualifications") has met, and whether such Statement of Qualifications shows that the Respondent has met, the requirements set out in the RFEOI Documents and (ii) the evaluation criteria set out in Schedule 1 – Description of Requirements.

**2.2 Key Personnel and Subcontractors**

2.2.1 As part of its Statement of Qualifications, a Respondent should submit the names of proposed key personnel and subcontractors.

2.2.2 Qualification to participate in a Request for Proposal may be conditioned on the use of the key personnel and subcontractors specified in a Statement of Qualifications, or other personnel or subcontractors approved in advance by the City.

2.2.3 A Respondent should therefore not change its key personnel or subcontractors without discussing the same with the City.

2.2.4 Notwithstanding the following, by submitting an Expression of Interest, each Respondent acknowledges that if selected to participate in a Request for Proposal, the Respondent may be required to include subcontractors selected by the City.

**SECTION 3 COMMUNICATIONS**

Respondents may not communicate with the City about the RFEOI except in writing by fax or email to the contact person listed on the cover page of this RFEOI.

**SECTION 4 SUBMISSION OF EXPRESSIONS OF INTEREST**

**4.1 Delivery**

Each Respondent should submit a single electronic copy of its entire Expression of Interest by email to [bid@vancouver.ca](mailto:bid@vancouver.ca). It is each Respondent's sole responsibility to ensure delivery of its Expression of Interest by the Closing Time. All submissions should be made at the Respondent's sole cost and expense.

**4.2 Late Expressions of Interest**

The City of Vancouver may, in its discretion, accept, or reject and return, any Expression of Interest received after the Closing Time.

**4.3 Form of Expression of Interest**

Each Expression of Interest must consist of a letter in the form set forth in Schedule 2 together with a Statement of Qualifications in the format set forth in Schedule 3, an insurance certificate in the form set forth as Schedule 4 and declaration of Supplier Code of Conduct compliance in the form of Schedule 5.

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**4.4 Lack of Information**

Following receipt of an Expression of Interest, the City of Vancouver may, in its sole discretion and without having any duty or obligation to do so, request that the Respondent provide the City of Vancouver with additional information to clarify or substantiate the information provided by the Respondent. If a Respondent fails to provide information required for the City's evaluation of the Respondent's qualifications, or fails to provide timely clarification or substantiation of the information supplied, that failure may result in no further consideration being given to the Expression of Interest.

**4.5 Material Changes**

Respondents should inform the City of Vancouver of any material change in information that might affect their qualification status at any time during the RFEOI process. Participants in a Request for Proposal will be required to update key qualification information at the time of proposal submission. Prior to the entry into any agreement for goods or services, a successful vendor will be required to confirm its continued status.

**SECTION 5 REVIEW OF EXPRESSIONS OF INTEREST**

**5.1 Evaluation by the City of Vancouver**

The City will review the Expressions of Interest submitted to determine whether, in the City's opinion, each Respondent has demonstrated that it has the required experience and qualifications in order for it to advance in the City's procurement process. In doing so, the City currently expects to base its decision with respect to each Respondent on (i) whether the Statement of qualifications submitted by the Respondent has met, and whether such Statement of Qualifications shows that the Respondent has met, the requirements set out in the RFEOI Documents and (ii) the evaluation criteria set out in Schedule 1 – Description of Requirements. The City currently expects to select a number of Respondents ("Pre-Qualified Respondents"); provided that:

- 5.1.1 the determination of which Respondents are designated as Pre-Qualified Respondents will be at the sole discretion of the City; and
- 5.1.2 the City reserves the right to limit the number of Respondents designated as Pre-Qualified Respondents.

**5.2 Inquiries**

The City, in its sole discretion and without having any duty or obligation to do so, may conduct any inquiries or investigations, including but not limited to contacting references, to verify the statements, documents, and information submitted in connection with an Expression of Interest and may seek clarification from a Respondent's bankers and clients regarding any financial and experience issues.

**5.3 Non-Conforming Expressions of Interest**

Expressions of Interest which fail to conform to the format requirements set forth in Schedule 3 hereto or which fail to conform to any other requirement of these RFEOI Documents may be rejected by the City of Vancouver, in its discretion. Notwithstanding the foregoing or any other provision of these RFEOI Documents, the City may at its sole discretion elect to retain for consideration Expressions of Interest which deviate either materially or non-materially from

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the format requirements set out in Schedule 3 hereto or which otherwise fail to conform to any other requirement of these RFEOI Documents.

**SECTION 6 NOTIFICATION AND RFP PROCESS**

**6.1 Notification of Prequalification**

Following the Closing Time, the City of Vancouver will only notify those Respondents which are selected as Pre-Qualified Respondents (or with which the City proposes to proceed to negotiate an agreement). The City of Vancouver thanks all other Respondents for their interest.

**6.2 Changes after Pre-Qualification**

Any change in the structure or formation of a Pre-Qualified Respondent will be subject to prior written approval of the City prior to the deadline for submission of proposals or tenders. The City may deny that approval if the change in the structure or formation of the Pre-Qualified Respondent, from that presented in the Expression of Interest, would have affected whether or not the Respondent would have been short-listed in the first instance.

**6.3 The City of Vancouver Rights**

6.3.1 The City may, without liability to any Respondent or Pre-Qualified Respondent, may:

- (a) amend the scope and description of the goods and services to be procured under the RFEOI or any subsequent Request for Proposal process, varying them from those described herein, or amend the qualifications that may be required to meet those requirements;
- (b) reject or accept any or all Expressions of Interest;
- (c) cancel the RFEOI process and reject all Expressions of Interest;
- (d) cancel the RFEOI process and commence a new process in respect of the same Request for Proposal with the same or an amended set of documents, information or requirements;
- (e) request that any Respondent provide additional information, clarifications or goods samples or demonstrations, without requesting the same from all Respondents; or
- (f) terminate the RFEOI process and enter into direct negotiations with any party whether or not a Respondent .

6.3.2 By submitting an Expression of Interest, a Respondent acknowledges and agrees that these RFEOI Documents are, in no way whatsoever, an offer to enter into an agreement (except on the limited terms and conditions expressly stated in Schedule 2), and that submission of an Expression of Interest by a Respondent does not in any way whatsoever create any obligation on the part of the City to treat the Respondent's or any other Respondent's Expression of Interest in any particular manner or undertake the City's RFEOI process in any particular manner (except as expressly stated in Schedule 2 with respect to confidentiality).

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6.3.3 The form of letter set forth in Schedule 2 also contains a release of the City's liability and other important terms and conditions that should be reviewed carefully by each Respondent, and each Respondent should obtain the advice of independent legal counsel in connection therewith.

**6.4 Information Disclaimer**

6.4.1 The City makes no representation, warranty or undertaking with respect to these RFEOI Documents and the City and its directors, officers, employees, agents, consultants and advisors will not be liable or responsible for the accuracy or completeness of the information in these RFEOI Documents or for any other written or oral information made available to any interested person or its advisors, and any similar such liability however arising, is expressly disclaimed by the City.

6.4.2 Each Respondent should conduct its own independent investigations of all relevant matters and must not rely on the City in such regard. The information contained in the RFEOI Documents is provisional and is expected to be superseded by information in a Request for Proposal (or "RFP") and other documents.

**SECTION 7 CONFLICTS/COLLUSION/LOBBYING**

**7.1 Conflicts of Interest Generally**

Each Respondent must disclose whether any officer, director, shareholder, partner, employee or contractor of the Respondent or of any of its proposed subcontractors, or any other person related to the Respondent's or any proposed subcontractor's organization (a "person having an interest") or any spouse, business associate, friend or relative of a person having an interest is:

- (a) an elected official or employee of the City; or
- (b) related to or has any business or family relationship with an elected official or employee of the City,

in each case such that there could be any conflict of interest or an appearance of a conflict of interest in the evaluation or consideration of the Respondent's Expression of Interest by the City. The City will evaluate each matter disclosed to determine whether and to what extent the Respondent can be given consideration in the RFEOI in light of the particular matter.

**7.2 Former City Employees**

Each Respondent must disclose whether any person having an interest (as defined above) is a former official, former employee or former contractor of the City who has non-public information relevant to the RFEOI obtained during his or her employment or engagement by the City. The City will evaluate each matter disclosed to determine whether and to what extent the Respondent can be given consideration in the RFEOI in light of the particular matter.

**7.3 Other Clients**

Each Respondent must disclose whether the Respondent or any of its proposed subcontractors is currently engaged in supplying (or is proposing to supply) goods or services to a third party such that entering into an agreement with the City in relation to the subject matter of the RFEOI would create a conflict of interest or the appearance of a conflict of interest between the Respondent's duties to the City and the Respondent's or its subcontractors' duties to such

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third party. The City will evaluate each matter disclosed to determine whether and to what extent the Respondent can be given consideration in the RFEOI in light of the particular matter.

**7.4 Collusion**

Each Respondent is required to disclose whether the Respondent is competing for purposes of the RFEOI with any entity with which it is legally or financially associated or affiliated. Each Respondent must also disclose whether it is cooperating in any manner in relation to the RFEOI with any other Respondent responding to the RFEOI. The City will evaluate each matter disclosed to determine whether and to what extent the Respondent can be given consideration in the RFEOI in light of the particular matter.

**7.5 Lobbying**

Each Respondent is required to disclose whether it or any officer, director, shareholder, partner, employee or agent of the Respondent or any of its proposed subcontractors: (1) is registered as a lobbyist under any lobbyist legislation in any jurisdiction in Canada or in the United States of America; or (2) has engaged in any form of political or other lobbying whatsoever with respect to the RFEOI or sought, other than through the submission of its Expression of Interest, to influence the outcome of the RFEOI process. The City will evaluate each matter disclosed to determine whether and to what extent the Respondent can be given consideration in the RFEOI in light of the particular matter.

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SCHEDULE 1 – DESCRIPTION OF REQUIREMENTS

RFEOI Section Reference	
1.1 - 1.3	<p><b>Description of Services:</b></p> <p>The City seeks Expressions of Interest from Respondents who have expertise in market research and analysis of housing strategies, including the following:</p> <ul style="list-style-type: none"> <li>(a) Demonstrated knowledge of the housing continuum;</li> <li>(b) Experience in the areas of development and property management;</li> <li>(c) Understanding of the Vancouver Building Bylaw; and</li> <li>(d) Understanding of the delivery of social housing in the Lower Mainland.</li> </ul>
1.5	<p><b>Anticipated Period of Issuance of RFP:</b></p> <p>Within three months</p>
2.1 & 5.1	<p><b>Evaluation Criteria</b></p> <p>Qualifications and relevant corporate experience and capability of the Respondent;</p> <ul style="list-style-type: none"> <li>(a) Financial capability;</li> <li>(b) Past report methodology and history of undertaking financial analysis such as cost benefit analysis;</li> <li>(c) Experience in primary research methods (i.e. key informant interviews);</li> <li>(d) Qualifications and relevant experience of the Respondent’s key personnel</li> <li>(e) Familiarity with legal agreements such as reciprocal easement agreements, operating agreement, etc.</li> <li>(f) Proven track record substantiated by recent and relevant client references;</li> <li>(g) Knowledge of the British Columbia non-market housing environment;</li> <li>(h) Understanding of social housing operations and/or property management;</li> <li>(i) Sustainability;</li> <li>(j) History of any litigation or claims made against the Respondent, or made by the Respondent against the City, during the three years previous to the Closing Time;</li> <li>(k) Ability to meet insurance requirements; and</li> <li>(l) Innovative ideas.</li> </ul> <p><b>Note:</b> The above evaluation criteria may not necessarily be listed in order of importance and will not necessarily be weighted equally.</p>

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SCHEDULE 2 – LETTER OF EXPRESSION OF INTEREST

*[Letterhead paper of the Respondent or participant responsible for  
a joint venture, including full postal address, telephone and facsimile.]*

Date: *[Insert]*

TO: THE CITY OF VANCOUVER (the "City")

RE: EXPRESSION OF INTEREST -- REQUEST FOR EXPRESSIONS OF INTEREST NO. [INSERT] (the "RFEOI") IN RESPECT OF CONSULTANT SERVICES TO REVIEW SHARED COMMON AREAS IN MIXED TENURE SOCIAL HOUSING PROJECTS

1. Being duly authorized to represent and act on behalf of [Insert full corporate name and if a joint venture, then state "on behalf of..." and list the full corporate names of the companies forming the joint venture], the undersigned hereby submits the attached Statement of Qualifications and supporting materials on behalf thereof.
2. Herein, the term "Respondent" refers to *[insert full corporate name and if a joint venture, then state "...refers to each of" and list the full corporate names of the companies forming the joint venture]*.
3. The City and its representatives are hereby authorized to conduct any inquiries or investigations to verify the statements, documents, and information submitted in connection with this Expression of Interest, and to seek clarification from the Respondent's bankers and clients regarding any financial and experience issues, and to do all other things stated in the RFEOI.
4. Capitalized terms used herein have the definitions ascribed thereto in the RFEOI.
5. The City its representatives may contact the following persons for further information:  
  
*[Respondent to insert information.]*
6. This Expression of Interest is made with the full understanding and agreement that:
  - (a) any information submitted during qualification may be subject to verification by the City of Vancouver, including during evaluation of any subsequent proposal or tender;
  - (b) the Respondent will (and does hereby undertake to) submit a bona fide proposal or tender in relation to the subject matter of the RFEOI (and consistent with this Expression of Interest) if the City invites the Respondent to participate in a request for proposals or invitation to tender;
  - (c) the City of Vancouver may:
    - (i) amend the scope and description of the goods and services to be procured under the RFEOI or any subsequent request for proposals process, varying them from those described in the RFEOI, or amend the qualifications that may be required to meet the City's requirements;
    - (ii) reject or accept any or all Expressions of Interest;

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- (iii) cancel the RFEOI process and reject all Expressions of Interest;
  - (iv) cancel the RFEOI process and commence a new process in respect of the same request for proposals with the same or an amended set of documents, information or requirements;
  - (v) request any respondent to provide additional information or clarification or goods samples or demonstrations without requesting such information from all respondents; or
  - (vi) terminate the RFEOI process and enter into direct negotiations with any party whether or not a respondent; and
- (d) the City of Vancouver will not be liable in any way whatsoever for any actions described under 4(c) of this letter.
7. The Respondent acknowledges and agrees that the RFEOI Documents are, in no way whatsoever, an offer to enter into an agreement except on the limited terms and conditions expressly stated in this letter, and submission of this Expression of Interest by the Respondent does not in any way whatsoever create any obligation on the part of the City to treat the Respondent's or any other respondent's Expression of Interest in any particular manner or undertake the City's RFEOI process in any particular manner (except as expressly stated below in this letter with respect to confidentiality).
8. The Respondent acknowledges and agrees to the information disclaimers and other terms and conditions set forth in the RFEOI.
9. Except only and to the extent that the City is in breach of Section 10 of this letter, the Respondent now releases the City, its officials, its agents and its employees from all liability for any costs, damages or losses incurred in connection with the RFEOI, including any cost, damages or losses in connection with:
- (a) any alleged (or judicially determined) breach by the City or its officials, agents or employees any obligation or duty under the RFEOI;
  - (b) any unintentional tort of the City or its officials or employees occurring in the course of conducting the RFEOI; or
  - (c) the manner in which the City: reviews, considers, evaluates or negotiates any Expression of Interest; addresses or fails to address any Expression of Interest; or resolves to enter into any contract or not enter into any contract.
10. Subject to the applicable provisions of the *Freedom of Information and Protection of Privacy Act* (British Columbia) and the City's right to publicly disclose information about or from any Expression of Interest, including without limitation names and prices, in the course of publicly reporting to the Vancouver City Council about the RFEOI, the City will treat the Expression of Interest (and the City's evaluation of it), in confidence in substantially the same manner as it treats its own confidential material and information.
11. The Respondent acknowledges receipt of the following amendments and addenda (if applicable);

**Amendment/Addendum No.** [Complete]      **Date:** [Complete]

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Amendment/Addendum No. [Complete]      Date: [Complete]

Amendment/Addendum No. [Complete]      Date: [Complete]

12. Any dispute relating to the RFEOI (except to the extent that the City breaches Section 10 above) will be resolved by arbitration in accordance with the *Commercial Arbitration Act* (British Columbia), amended as follows:

- (a) The arbitrator will be selected by the City's Director of Legal Services;
- (b) Section 9 of this letter, and the other provisions hereof, will apply; and
- (c) The Respondent will bear all costs of the arbitration.

13. The Respondent (a) has read, understands and agrees to the terms and conditions in this letter, (b) has had an opportunity to seek legal counsel and (c) affirms that the statements made in its Expression of Interest are true and correct in every detail.

Respondent Name(s): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Signatory: \_\_\_\_\_

Title of Signatory: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Cheque Payable/Remit to Address: \_\_\_\_\_

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_

Key Contact Person: \_\_\_\_\_ E-mail: \_\_\_\_\_

GST Registration No.: \_\_\_\_\_ Date and Jurisdiction of Incorporation: \_\_\_\_\_

City of Vancouver  
Business License No.  
(or, if available, Metro  
West Inter-Municipal  
Business License No.): \_\_\_\_\_ WorkSafeBC Registration No.: \_\_\_\_\_

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**SCHEDULE 3 – FORMAT FOR EXPRESSIONS OF INTEREST**

Expressions of Interest submitted by Respondents should consist of:

1. a completed and duly executed Letter of Expression of Interest (the foregoing Schedule 2);
2. a completed and duly executed insurance certificate and a completed and duly executed declaration of Supplier Code of Conduct Compliance (the following schedules 4 and 5); and
3. a Statement of Qualifications, consisting of and arranged as follows:

(a) **Title Page (1 page)**

The title page should identify the RFEOI number identified on the cover page of this RFEOI, the Closing Time, and the Respondent's name, address, telephone number, and contact person (with email address).

(b) **Table of Contents / Index**

(c) **Corporate Experience:**

- Describe the type of entity (for example, individual, corporation, partnership, sole proprietorship) and if a joint venture, clearly state this and state who the joint venture parties are and identify who is acting as the lead.
- Describe the company/entity size, depth, and annual sales volumes (in dollars).
- Provide client references, where possible show experience in research, analysis and a clear understanding of the delivery of social housing as well as property management in the context of the City of Vancouver. Additional knowledge in the areas of development, property management, and Vancouver Building Bylaw should also be presented.
- Provide a history of litigation or claims made against the Respondent during the three years immediately prior to the Closing Time.

(d) **Corporate Capability:**

- Describe the Respondent's capability (financial, experience and workload capacity) to undertake the role of service provider.
- Provide resumes of proposed key personnel.

(e) **Completed and Current Major Projects**

- List three relevant projects, with names of customers, dollar amounts, names of company personnel involved and client/owner references.
- Describe the Respondent's capacity to undertake the project and describe any other projects scheduled during the anticipated time frame.

(f) **Outline of Services to be Provided**

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Provide a work plan, including anticipated timelines, and brief discussion of your methodology and approach to:

- Reviewing and analyzing standards regarding shared common areas within mixed-tenure projects;
- Interviewing stakeholders to understand the financial, operational, legal, and social implications of shared versus separate common areas in mixed-tenure projects; and
- Identifying opportunities and potential next steps regarding common area standards.

(g) **Conflicts/Collusion/Lobbying**

Provide information responsive to Section 7.0 of the RFEOI.



CERTIFICATE OF EXISTING INSURANCE TO BE COMPLETED AND APPENDED TO THE PROPOSAL

Section 2 through 8 – to be completed and executed by the Insurer or its Authorized Representative

- 1. THIS CERTIFICATE IS ISSUED TO: City of Vancouver, 453 W 12th Avenue, Vancouver, BC, V5Y 1V4 and certifies that the insurance policy (policies) as listed herein has/have been issued to the Named Insured and is/are in full force and effect.
2. NAMED INSURED (must be the same name as the proponent/bidder and is either an individual or a legally incorporated company)

BUSINESS TRADE NAME or DOING BUSINESS AS

BUSINESS ADDRESS

DESCRIPTION OF OPERATION

- 3. PROPERTY INSURANCE (All Risks Coverage including Earthquake and Flood)
INSURER Insured Values (Replacement Cost) -
TYPE OF COVERAGE Building and Tenants' Improvements \$
POLICY NUMBER Contents and Equipment \$
POLICY PERIOD From to Deductible Per Loss \$

- 4. COMMERCIAL GENERAL LIABILITY INSURANCE (Occurrence Form)
Including the following extensions: INSURER
Personal Injury POLICY NUMBER
Property Damage including Loss of Use POLICY PERIOD From to
Products and Completed Operations Limits of Liability (Bodily Injury and Property Damage Inclusive) -
Cross Liability or Severability of Interest Per Occurrence \$
Employees as Additional Insureds Aggregate \$
Blanket Contractual Liability All Risk Tenants' Legal Liability \$
Non-Owned Auto Liability Deductible Per Occurrence \$

- 5. AUTOMOBILE LIABILITY INSURANCE for operation of owned and/or leased vehicles
INSURER Limits of Liability -
POLICY NUMBER Combined Single Limit \$
POLICY PERIOD From to If vehicles are insured by ICBC, complete and provide Form APV-47.

- 6. UMBRELLA OR EXCESS LIABILITY INSURANCE Limits of Liability (Bodily Injury and Property Damage Inclusive) -
INSURER Per Occurrence \$
POLICY NUMBER Aggregate \$
POLICY PERIOD From to Self-Insured Retention \$

- 7. PROFESSIONAL LIABILITY INSURANCE Limits of Liability
INSURER Per Occurrence/Claim \$
POLICY NUMBER Aggregate \$
POLICY PERIOD From to Deductible Per Occurrence/Claim \$

If the policy is in a "CLAIMS MADE" form, please specify the applicable Retroactive Date:

- 8. OTHER INSURANCE
TYPE OF INSURANCE Limits of Liability
INSURER Per Occurrence \$
POLICY NUMBER Aggregate \$
POLICY PERIOD From to Deductible Per Loss \$
TYPE OF INSURANCE Limits of Liability
INSURER Per Occurrence \$
POLICY NUMBER Aggregate \$
POLICY PERIOD From to Deductible Per Loss \$

SIGNED BY THE INSURER OR ITS AUTHORIZED REPRESENTATIVE

PRINT NAME OF INSURER OR ITS AUTHORIZED REPRESENTATIVE, ADDRESS AND PHONE NUMBER Dated

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**SCHEDULE 5 - DECLARATION OF SUPPLIER CODE OF CONDUCT COMPLIANCE  
DECLARATION OF SUPPLIER CODE OF CONDUCT COMPLIANCE**

Purpose: All proposed suppliers are to complete and submit this form to certify compliance with the supplier performance standards set out in the Supplier Code of Conduct.

The City of Vancouver expects each supplier of goods and services to the City to comply with the supplier performance standards set out in the City's Supplier Code of Conduct (SCC) <[http://vancouver.ca/policy\\_pdf/AF01401P1.pdf](http://vancouver.ca/policy_pdf/AF01401P1.pdf)>. The SCC defines minimum labour and environmental standards for City suppliers and their subcontractors.

Suppliers are expected to comply with the aforementioned standards upon submitting a tender, proposal, application, expression of interest or quotation to the City, or have a plan in place to comply within a specific period of time. The City reserves the right to determine an appropriate timeframe in which suppliers must come into compliance with these standards. To give effect to these requirements, an authorized signatory of each proposed vendor must complete the following declaration and include this declaration with its submission:

As an authorized signatory of \_\_\_\_\_ (*vendor name*), I declare that I have reviewed the SCC and to the best of my knowledge, \_\_\_\_\_ (*vendor name*) and its proposed subcontractors have not been and are not currently in violation of the SCC or convicted of an offence under national and other applicable laws referred to in the SCC, other than as noted in the table below (*include all violations/convictions that have occurred in the past three years as well as plans for corrective action*).

Section of SCC / title of law	Date of violation /conviction	Description of violation / conviction	Regulatory / adjudication body and document file number	Corrective action plan

I understand that a false declaration and/or lack of a corrective action plan may result in no further consideration being given to the submission of \_\_\_\_\_ (*vendor name*).

Signature: \_\_\_\_\_

Name and Title: \_\_\_\_\_

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SCHEDULE 6 - ADDITIONAL MATERIAL

See links to the following documents for additional material to review:

High-Density Housing for Families with Children Guidelines (1993)

<http://guidelines.vancouver.ca/H004.pdf>

and

City of Vancouver Housing Design and Technical Guidelines for Social Housing (2018)

<http://vancouver.ca/files/cov/housing-design-and-technical-guidelines.pdf>