

# TOWN OF QUALICUM BEACH

## Ways to Achieve Attainable Market Housing (WAAM Housing) Plan

### REQUEST FOR PROPOSALS

SUMMARY OF KEY INFORMATION	
<b>RFP Reference</b>	Ways to Achieve Attainable Market Housing (WAAM Housing) Plan
<b>Overview of the Opportunity</b>	The Town of Qualicum Beach requests Proposals from experienced qualified Consultants to provide an Attainable Market Housing (WAAM Housing) Plan.
<b>Closing Date &amp; Time</b>	<b>May 20, 2025</b> 4:00pm, PST
<b>Instructions for Proposal Submission</b>	<p>Proposals must be consolidated into one PDF file. Two printed copies and a copy of the proposal in electronic format must be submitted prior to the deadline.</p> <ol style="list-style-type: none"> <li><b>In the 'Subject Field' enter:</b> Ways to Achieve Attainable Market Housing (WAAM Housing) Plan</li> <li><b>Add files into one consolidated .pdf format and send via email</b> and mail to:  <p style="text-align: center;"> <b>Town of Qualicum Beach</b>  Corporate Services  #201-660 Primrose Street  Qualicum Beach, BC V9K 1W8  <a href="mailto:corporateservices@qualicumbeach.com">corporateservices@qualicumbeach.com</a> </p> </li> </ol>
<b>Questions</b>	Questions are to be submitted in writing quoting the RFP Reference by <b>May 12, 2025</b> to email: <a href="mailto:hsvensen@qualicumbeach.com">hsvensen@qualicumbeach.com</a>
<b>Successful Proponent(s) Notification</b>	<b>June 25, 2025</b>
<b>Withdrawal of Submission</b>	Proposals may be withdrawn by written notice only, made by an authorized representative of the Proponent sent to email: <a href="mailto:corporateservices@qualicumbeach.com">corporateservices@qualicumbeach.com</a> prior to the closing date & time.
<b>Note to Proponents</b> <i>This is a request for proposals and not a call for tender or request for binding offers. No contractual obligations will arise between the Town and any Proponent until, and unless, the Town and a Proponent enter into a formal, written contract for the Proponent to perform the required assessment work.</i>	

## TERMS OF REFERENCE

### 1. INSTRUCTIONS TO PROPONENTS

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#### 1.1 Request for Proposals

The Town of Qualicum Beach invites proposals from qualified, professional Consultants with proven expertise in housing policy, real estate market analysis, financial modeling, public engagement, and strategic planning to develop a comprehensive and actionable Ways to Achieve Attainable Market Housing Plan (the Plan).

The Plan will include feasibility profiles for five to eight housing solutions that address specific “Priority Housing Groups” (PHGs) within the Town. PHGs could include socio-economic demographic groups such as retirees, older seniors, young families with children, service workers, etc.

Following is an overview of the proposed approach.

1. PHGs will be determined in Phase 2 of the Town’s 2025 Official Community Plan (OCP) Review, with information to be shared with the Consultant in June 2025.
2. The Consultant will complete a Housing Opportunities Report addressing the local social, demographic, and market circumstances that may provide opportunities or constraints for the Town to create feasible housing solutions.
3. The Consultant, in collaboration with the OCP Review Steering Committee, will develop criteria to evaluate potential housing solutions. The Evaluative Criteria would include factors such as physical and financial feasibility and community compatibility.
4. The Consultant will carry out public engagement to solicit creative housing solutions from residents and other interest-holders in Qualicum Beach. In compiling the public’s input, the Consultant may make minor changes to the proposed housing solutions to make them more attainable or financially viable. The Consultant may also propose additional proposed solutions, as inputs to the next step. OCP Steering Committee members may also propose solutions as input to be evaluated.
5. Each proposed Housing Solution will be assessed by the Consultant using the Evaluation Criteria developed in collaboration with the OCP Review Steering Committee.
6. The Consultant, with input from Town staff and the OCP Review Steering Committee, will undertake a detailed Feasibility Profile for each of the housing solutions that score the highest.
7. The top 5–8 housing solutions will be compiled into the WAAM Housing Plan, forming a practical toolkit to address the identified PHGs.

**Definitions:**

- **Attainable Housing** means housing that meets the traditional definition of attainable housing (shelter costs remaining at or below 30% of before-tax household income) for a range of income levels within a Priority Housing Group.
- **Feasibility Profile** means a structured analysis of a proposed housing solution that evaluates its practical, financial, and operational viability. Feasibility Profiles should detail the solution's estimated costs (including Pro Forma viability), potential funding sources, recommended governance structures, regulatory or policy requirements, anticipated benefits and risks, target Priority Housing Group(s), and an actionable implementation steps.
- **Housing Opportunities Report** means the preliminary deliverable that addresses the local social, demographic, and market circumstances that may provide opportunities or constraints for the Town to create feasible housing solutions
- **OCP Review Steering Committee** means a standing committee of Council comprised of local residents for the purpose of providing input into the 2025 OCP Review process, Quality of Life Survey, and related 2025 initiatives such as the WAAM Housing Plan.
- **Market Housing** means housing that minimizes reliance on direct, ongoing public sector subsidies. This includes both conventional market-rate housing and models that employ innovative financial or legal mechanisms to improve access for populations not traditionally served by the private market. Such models may include shared equity, cooperative ownership, or other structures that facilitate entry into the housing market while preserving long-term affordability and enabling residents to obtain a property interest and participate in any appreciation of the asset over time.
- **Priority Housing Group** refers to one of the socio-economic demographic groups identified through the 2025 OCP Review as having significant unmet housing needs. These PHGs will serve as the focus of housing solutions to be explored in the Plan, and may include groups such as older seniors, young families, people with accessibility needs, service industry workers and other groups, to be determined by the OCP Review process.
- **Pro Forma Viability** means whether or not it is financially feasible to implement a proposed Housing Solution, from the perspective of a housing provider (developer/landowner/investor).

## 1.2 Project Background

The Town of Qualicum Beach is committed to addressing the growing need for attainable and affordable housing while maintaining the character and sustainability of the community. Residents being able to manage increasing shelter costs has become a pressing challenge, with rising costs limiting access to secure housing for both current and future residents.

The Housing Plan will provide a detailed analysis of housing solutions that are specific to the local challenges and opportunities in Qualicum Beach. The findings of the Housing Plan will integrate seamlessly into broader municipal planning efforts and future strategic initiatives.

This project represents a critical step in ensuring that Qualicum Beach remains an inclusive and vibrant community, where individuals and families across diverse income levels and household types can secure stable and attainable housing. The findings and housing solutions from the Plan will serve as a

foundation for future housing development efforts in the Town. Although the amount of housing required over the next 20 years has been specified in the 2024 Interim Housing Needs Report, further work is required to determine what types of housing will be delivered and how to ensure that specific groups are not excluded from the market.

### **1.3 Community Context**

*The statistical data in this section is sourced from the 2023-2027 Strategic Plan. However, it is advisable to review and update these figures as necessary during the formulation of the Plan.*

The Town of Qualicum Beach is a charming coastal community of 9,303 people and one of the most beautiful communities in the country. The Town is surrounded by rivers, forests and farmland located in the shadow of Mount Arrowsmith. Small- town character, walkability and year-round access to recreational opportunities support a high quality of life for residents and provides an attractive destination for visitors. The Town centre is vibrant, with an exciting revitalization of the adjacent East Village area currently underway. Qualicum Beach is known for its connection to nature, as well as its celebration of arts and culture.

#### ***Economic Sectors***

Qualicum Beach has a mix of tourism, some manufacturing, and service businesses. The service sector, which includes retail, wholesale, finance, insurance, real estate, business services, accommodations, and other services, remains the largest employer in the region, accounting for 67% of overall employment. The trade sector, which includes both retail and wholesale trade, accounted for 20.5% of overall employment and reflects a growing trend in retail. There is currently very little manufacturing activity, though some of the economic development areas identified in the OCP would include sustainable manufacturing activity.

The Town is currently engaged in the development of an economic development strategy entitled “Pathways to Sustainable Economic Development in Qualicum Beach”, with the goal of creating a roadmap to help the Town convert sustainable economic development goals into actionable strategies that Council can advance through future Strategic Planning and Budgeting processes.

#### ***Employment***

Employment is forecasted to increase, with the service sector expected to show the strongest growth and the agricultural sector anticipated to decline slightly. Manufacturing is expected to experience modest growth, increasing at approximately half the rate of the service sector. Construction will see positive employment growth along with business services. Given the aging population of Qualicum Beach, health and social services, along with other services, will likely see significant increases in employment opportunities. It is expected that employment in these two sub-sectors will almost double over the next 25 years.

#### ***Population***

In 2021, the majority (56.3%) of Qualicum Beach residents were aged 65 or older, with the 25 to 29 age group being the least populated. The median age was 67.5 years. Additionally, 41.7% of the population

were in the working-age group of 15 to 64 years old, and 14.88% were part of the younger population, poised to join the labor force within the next two decades.

## **2. Consultant Prerequisites**

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The ideal proponent(s) will possess the following qualifications:

### **1. Expertise in Affordable/Attainable Housing Development**

- Demonstrated experience in planning, constructing and/or otherwise delivering housing projects in BC, preferably on Vancouver Island.
- Knowledge of financially self-sustaining housing models, including but not limited to co-operative housing, purpose-built rentals, mixed-income developments, shared ownership, and non-profit housing, leasehold properties, rent-to-own, or carriage/laneway/infill housing.
- Familiarity with innovative financing, ownership, and construction structures

### **2. Real Estate Market & Economic Feasibility Analysis**

- Experience in real estate market analysis, including housing demand studies and affordability assessments.
- Ability to conduct financial modeling and risk assessments for various housing delivery models.
- Strong understanding of housing governance structures, such as land trusts, partnerships, and municipal development corporations.

### **3. Strategic Planning & Business Plan Development**

- Proven ability to integrate policy, financial sustainability, and community needs.
- Experience working with municipal governments to create housing strategies that align with broader OCPs and local bylaws.
- Familiarity with best practices in housing affordability policies from other Canadian municipalities, particularly in BC.

### **4. Community & Interest-holder Engagement**

- Demonstrated experience in engaging diverse interest-holders, including municipal staff, elected officials, developers, housing advocates, and residents.
- Expertise in public consultation methodologies in line with International Association of Public Participation (IAP2) standards.
- Ability to facilitate inclusive engagement processes to ensure meaningful input from underrepresented groups, such as young families, seniors, and lower-income residents.

### **5. Policy & Regulatory Expertise**

- Strong knowledge of municipal, provincial, and federal housing policies, including funding programs, zoning regulations, and housing incentives in British Columbia.
- Experience working with Official Community Plans (OCPs) and local zoning bylaws to facilitate housing development.
- Understanding of land use planning and infrastructure requirements that impact housing affordability.

### **6. Analytical & Reporting Capabilities**

- Proficiency in conducting data-driven research and financial modeling to support decision-making.

- Strong report-writing and presentation skills, with the ability to communicate complex findings in a clear and visually engaging format.
- Experience developing comprehensive, actionable business plans that provide detailed recommendations, cost estimates, and implementation strategies.

7. Knowledge of the Local Context

- Experience working with small or mid-sized communities on housing affordability initiatives in BC is preferred.
- Familiarity with Vancouver Island's regional housing market and economic trends will be considered an asset.
- Familiarity with the housing implications of a retirement community on the future viability and sustainability.

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### 3. Deliverables & Scope of Services

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*The following deliverables are required:*

1) **Project Workplan and Engagement Strategy**

- Project Workplan Document outlining the project timeline, milestones, methodologies, and key objectives.
- Clear delineation of lands that will not be considered for housing development. For example, land in the Agricultural Land Reserve or in Ecologically Sensitive Areas.
- A set of Evaluative Criteria (with scoring instructions) to objectively evaluate the viability of housing solutions proposed by Town staff, the OCP Steering Committee, and/or the public. Pro Forma Viability will be a key criterion.
- Engagement Strategy & Schedule, detailing how interest-holders and the community will be consulted throughout the process. This should include, at a minimum:
  - One in-person public meeting to solicit ideas for innovative housing solutions from residents and interest-holders.
  - Opportunities for community members to propose written submissions of innovative housing solutions
  - Meetings with key interest-holders such as residents associations, developers, housing advocates, Parksville-Qualicum Beach Tourism Association, the Seniors' Centre, and builders who understand the local housing market and development challenges

2) **Housing Opportunities Report**

The Housing Opportunities Report should address the local social, demographic, and market circumstances that may provide opportunities or constraints for the Town to create feasible housing solutions, including:

- Summary of relevant best practices in innovative, attainable housing development. Examples could include initiatives such as land trusts, cooperative ownership models, mixed-income developments, secondary suites, co-operative housing, mixed-income developments, shared ownership, non-profit housing, leasehold properties, rent-to-own, carriage/laneway/infill housing and purpose-built rentals.

- Analysis of the local social, demographic, and market circumstances that offer constraints and opportunities for housing development in Qualicum Beach. What other alternative housing forms/housing delivery models exist already and could work here?
- Identification of the gaps in the current local housing market, building on the work completed in the 2024 Interim Housing Needs Report and 2025 OCP Review work
- Summary of critical factors in the housing development process, such as zoning regulations, land availability, and construction costs that could be improved with policy adjustments
- Summary of potential funding sources, including provincial and federal programs, private sector investment, and alternative financing mechanisms.
- Identification of potential development, redevelopment, or infill opportunities within the Town.
- High-level analysis of the most appropriate housing types and features for each PHG.

### **3) WAAM Housing Plan (Final Report)**

*Comprehensive Document that details five to eight Feasibility Profiles for the most viable housing solutions that address at least one of the PHGs:*

- Documented background information within the plan should include, at minimum:
  - Summary of research, analysis, and engagement findings.
  - Key information about the most viable housing solutions. For each housing solution, the following should be detailed as part of a Feasibility Profile:
    - The target PHG
    - Cost estimates per project and per unit
    - Required or recommended governance structures, policy changes, and operational models
    - Benefits and drawbacks, including risks and mitigation strategies
    - Strategies for securing capital, funding, and investment
    - Level of end-user affordability
    - Level of developer experience required
    - Degree of subsidy required, if any
    - Its objective score and ranking based on the determined Criteria
    - An implementation strategy for each Housing Solution
    - An estimation of “lowest possible housing cost” for the end user.
- Executive Summary & Infographic Summary Report
  - High-level summary of key recommendations for policymakers and interest-holders.
  - Infographic-style presentation of housing solutions and financial feasibility outcomes.

### **4) Presentation to Town Council & Final Documentation**

- Formal presentation to Town Council, summarizing findings and recommendations.
- Final digital and print copies of all reports and supporting documents.
- Transfer of raw data, GIS mapping files, and research materials to the Town for future use.



#### **4. PROJECT ORGANIZATION AND MANAGEMENT**

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The Consultant will collaborate with Town staff, attending meetings as necessary. The Proponent must specify in the schedule whether these meetings will be conducted in-person or virtually.

The OCP Review Steering Committee is an advisory body that is available to provide advice and guidance to the Consultant throughout the project. At a minimum, meetings with the OCP Review Steering Committee should be held at the following points in the process:

- To receive feedback on the proposed Evaluative Criteria before they are finalized
- To receive and provide feedback on the Housing Opportunities Report
- To review the draft list of housing solutions that will be detailed in Feasibility Profiles in the final WAAM Housing Plan.

The Consultant will:

- be responsible for recording all meeting minutes, including significant proceedings and decisions, identifying 'action by' parties;
- reproduce and distribute copies of minutes within two (2) working days after each meeting; and
- transmit the meeting minutes to meeting participants including those who were not in attendance.

The Consultant will lead and otherwise be responsible for all elements of the Services, including reporting at key milestones, timely communications with Town staff on emerging project issues, and maintaining complete documentation (e.g. minutes, presentations) from internal and external meetings.

#### **5. PROJECT SCHEDULE**

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##### **5.1 Project Schedule**

- a) The Consultant is responsible for their availability and ability to meet time schedule and completion date. Proponents are to confirm they will meet the Town's expectations with a written acknowledgement of the ability to deliver the required services to the Town given the Proponents' existing workload and future commitments.
- b) Schedule Acknowledgements
  - i. Proponents should note that the Target Dates outlined in the Proposed Work Schedule and Milestone Dates table below are there as a guide for the seamless progression of the project.



Proposed Work Schedule and Milestone Dates – WAAM Housing Plan		
Item No.	Key Milestones	Target Dates
a)	<b>Communications and Engagement Plan Outline</b>	TBD by consultant
b)	<b>Public Engagement Period</b> (Including members of Council, interest-holder groups, residents, etc.)	TBD by consultant, with general public engagement to occur September-November 2025
c)	Ways to Achieve Attainable Market Housing (WAAM Housing) Plan <b>Presentation to Council</b>	February 2026*

## 5.2 Documents

The Consultant will provide original documents and transfer final digital files to the Town. All materials produced under this project are solely the intellectual property of the Town. The format of the digital files will be compatible with Microsoft Office and/or Adobe Acrobat.

## 5.3 Fee Schedule and Cost of Services

- Proponents to submit with their Proposal, a GANTT chart outlining schedule of effort and fees, for all of the Services. Include level of effort by each team member, including hourly rates and total lump sum pricing. The hourly rates will be used to value additional services if required.
- The Proponent shall include in the fee schedule all sub-Consultant fees and all Consulting Team disbursements.
- The Proponent shall indicate any additional “Value-Added Services” or costs not accounted for in the fee schedule as part of the proposal submission.
- The successful Consultant will not be able to claim any additional cost as a result of changes to the schedule. This condition shall be in effect for the duration of the project.

The Total Price includes business administration services, travel costs, disbursements, charges, expenses of any sort (excluding GST) for the Consultant to complete the Project to the Town’s standards in accordance with the work schedule in this RFP.

## 6. REFERENCE MATERIALS

Proponents should identify any relevant documents or data that would contribute to achieving the objectives of the project. The following resource materials are available to the successful Consultant and can be found on the Town’s website:

- 2024 – 2028 Strategic Plan
- 2024 Interim Housing Needs Report
- 2018 Official Community Plan
- 2009 and 2018 Retail and Tourism Gap Analysis
- GIS maps, imagery, and database information

The Consultant will work with the Town to identify additional information required to complete the Services. There are other reports from third parties, such as the Parksville-Qualicum Beach Tourism Association that must be obtained directly from those organizations.

## 7. PROPOSAL EVALUATION AND CRITERIA

The Town of Qualicum Beach will evaluate all submitted proposals. The Town will disqualify Proponent(s) that fail to meet the minimum requirement for qualifications, experience, and methodology from the process prior to cost considerations. The object of the evaluation and selection process is to identify the proposal that, in the Town's opinion, offers the best value for the products and/or services requested.

The Town has a Social Procurement Policy which will contribute to the assessment of best value. In assessing best value, the Town:

- May not necessarily accept the lowest proposal, and may, in its sole discretion, accept any proposal and may waive any minor informality or irregularity in proposals;
- Has no obligation to receive further information, whether written or oral, from any Proponent, nor to disclose the nature of any proposals received; and
- May negotiate changes to the scope of work with any one or more proponents without having any duty or obligation to advise any other Proponent(s) or to allow them to vary their Proposal(s) due to changes to the scope of work.

Proposals will be evaluated based on the following criteria:

Rated Criteria Category	Points
<b>Proposed Work Plan, Methodology and Approach</b> <ul style="list-style-type: none"> <li>• Detailed work plan provided with proper identification and all key components in fulfilling the proposed project.</li> <li>• Communications and engagement approach that explains the communication process between the Proponent and key interest-holders and strategies for public engagement.</li> <li>• Details provided of the project management approach and methodology that will be followed for each phase of deliverables.</li> <li>• Detailed project schedule provided in a GANTT chart which demonstrates a critical path for each deliverable.</li> </ul>	0 to 25
<b>Experience and Qualifications</b> <ul style="list-style-type: none"> <li>• Demonstrated ability in housing development, strategy and planning, facilitation, engagement, analysis, and report writing.</li> <li>• Provide a description of the company, including its resources, and offer details on past or similar projects.</li> <li>• Provide examples of at least three housing projects (policy and/or developments) completed in other Canadian municipalities within the last five years, preferably on Vancouver Island.</li> <li>• Demonstrate familiarity with work done by other economic development or tourism organizations in the area</li> </ul>	0 to 25

Rated Criteria Category	Points
<b>Financial and Value-Added Benefits</b> <ul style="list-style-type: none"> <li>• Price Schedule – Fee matrix with hourly rates and charges by level of effort (hours) associated to task and total lump sum fee including disbursements (excludes GST).</li> <li>• Value-added Benefits to the Town</li> </ul>	0 to 25
<b>References</b> <ul style="list-style-type: none"> <li>• Relevant references provided.</li> </ul>	0 to 25

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