REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

Title: Review of Surrey’s Population and Employment Model
Reference No.: 1220-050-2019-022

FOR PROFESSIONAL SERVICES

(General Services)
Issue Date: September 3, 2019
REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

PRE-QUALIFICATION OF CONSULTANT
REVIEW OF SURREY’S POPULATION AND EMPLOYMENT MODEL

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REQUEST FOR EXPRESSIONS OF INTEREST AND STATEMENTS OF QUALIFICATIONS

1. INTRODUCTION

1.1 Purpose

The purpose of this request for expressions of interest / statements of qualifications (the “RFEOI/SOQ”) is to:

(a) invite submissions (the “Submission”) from respondents (the “Respondent”) that describe the desire, relevant expertise, capability, reputation and resources of the Respondent to undertake the project as generally set out in Schedule A – Scope of Services; and

(b) to select a Respondent or Respondents who may be invited to participate in the next stage of the competitive selection process, when called.

This RFEOI/SOQ is not a solicitation of proposals; rather it is a non-binding invitation to qualified Respondents to make themselves known to the City by providing information and by demonstrating to the City their desire, relevant experience, qualifications, capability, reputation and available resources.

All interested parties should respond to this RFEOI/SOQ as the City does not guarantee that a more formal procurement process (as determined at the City’s discretion) will be issued following this RFEOI/SOQ and may elect to directly negotiate with one or more interested parties, or the City may at any time and at its sole discretion decide to cancel this process for any reason.

1.2 Anticipated Schedule

The following estimated schedule applies to this RFEOI/SOQ

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Issuance of RFEOI/SOQ</td>
<td>September 3, 2019</td>
</tr>
<tr>
<td>2</td>
<td>Information Meeting</td>
<td>September 13, 2019</td>
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<tr>
<td>3</td>
<td>RFEOI/SOQ Preferred Date for Submission</td>
<td>September 27, 2019</td>
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<tr>
<td>4</td>
<td>Commencement of Evaluation of Submissions (Approx.), Interviews and Clarifications</td>
<td>Estimated on Week of September 30, 2019</td>
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<tr>
<td>5</td>
<td>Selection of Preferred Respondents</td>
<td>Estimated on Week of October 7, 2019</td>
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<tr>
<td>6</td>
<td>Distribution of solicitation document for Stage 2 - RFP</td>
<td>Week October 7, 2019</td>
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The dates are estimates only. The City reserves the right, at its sole discretion, to make changes to the dates above based on the City’s requirements.
1.3 Definitions

In this RFEOI/SOQ the following definitions shall apply:

“BC Bid Website” means www.bcbid.gov.bc.ca;

“City” means the City of Surrey;

“City Representative” has the meaning set out in section 3.4;

“City Website” means www.surrey.ca;

“Date” has the meaning set out in section 3.3;

“Evaluation Team” means the team appointed by the City;

“Preferred Respondent(s)” means the Respondent(s) selected by the Evaluation Team;

“Respondent” means an entity that submits a Submission;

“RFEOI/SOQ” means this Request for Expressions of Interest and Statements of Qualifications;

“Services” has the meaning set out in Schedule A; and

“Submission” means a submission submitted in response to this RFEOI/SOQ.

2. COMPETITIVE SELECTION PROCESS

2.1 This section describes the competitive selection process that the City intends to use in the selection of a Preferred Respondent or Preferred Respondents. The anticipated competitive selection process includes two stages; the RFEOI/SOQ, and the RFP.

(a) Stage One – (RFEOI/SOQ) (Prequalification)

This RFEOI/SOQ to prequalify Respondents with the necessary experience to perform a review of Surrey’s Population and Employment Model is open to all interested Respondents. The prequalification of a Respondent is based on defined requirements specified in this document. The prequalification of a Respondent is based on the evaluation criteria specified in this RFEOI/SOQ.

(b) Stage Two – Request for Proposals (RFP)

An RFP will be sent to Preferred Respondents once the prequalification process has been completed. Only those Respondents who have been prequalified by the City in Stage One will be eligible to participate in Stage Two. The decision to participate in the RFP in Stage Two is the decision of each prequalified Respondent.

2.2 Should there be an insufficient number of prequalified Respondents after Stage One to permit a competition in Stage Two, the City reserves the right to cancel Stage Two or to
modify the requirements and re-publish the solicitation using the same or a different approach. The assessment of the sufficiency of number of prequalified Respondents shall be at the City’s sole and absolute discretion.

The City reserves the right to accept or reject any or all responses to this RFEOI/SOQ.

3. **INSTRUCTIONS TO RESPONDENTS**

3.1 **Address for Submission Delivery**

A Submission should be labelled with the Respondent’s name, RFEOI/SOQ title and number. A Submission should be submitted in the form as described in Section 4.2 – Form of Submission.

The Respondent may submit a Submission either by email or in a hard copy, as follows:

(a) **E-mail**

If the Respondent chooses to submit by email, the Respondent should submit the Submission electronically in a single pdf file which must be delivered to the City by email at: purchasing@surrey.ca

**PDF emailed Submissions are preferred,** and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email attachments, Respondents should phone [604-590-7274] to confirm receipt. A Respondent bears all risk that the City’s computer equipment functions properly so that the City receives the Submission.

(b) **Hard Copy**

If the Respondent chooses NOT to submit by email, the Respondent should submit one (1) original unbound Submission and five (5) copies (six (6) in total) which must be delivered to the City at the office of:

Name: Richard D. Oppelt, Manager, Procurement Services

at the following location:

Address: Surrey City Hall
Finance Department – Procurement Services Section
Reception Counter, 5th Floor West
13450 – 104 Avenue, Surrey, B.C., Canada V3T 1V8

3.2 **Information Meeting**

An information meeting will be hosted by the City Representative to discuss the City’s requirements under this RFEOI/SOQ (the “Information Meeting”). At the time of issuance of this RFEOI/SOQ an information meeting has been scheduled as follows:
Date: September 13, 2019  
Time: 3:00 p.m.  
Location: Surrey City Hall, 13450 – 104 Ave., Surrey, BC, Canada V3T 1V8

It is possible that some questions raised, and information provided during the Information Meeting may be the only source of critical information essential to prepare and submit a successful Submission. Respondents are responsible to ensure they are fully informed and have a clear understanding of the requirements. In addition, should it become necessary to clarify substantive items that are raised during the Information Meeting, the City may, at its sole discretion, issue an addendum to this RFEOI/SOQ documenting such information, questions and responses.

The City prefers that Respondents interested to participate in this RFEOI/SOQ should attend the Information Meeting by completing the Attachment 1 – Information Meeting Response Form to confirm attendance in order for the City to ensure sufficient meeting room space and convenient location to all participants. The City would prefer to receive the invitation response form before September 12, 2019.

It is preferred that two (2) representatives from each Respondent attend.

3.3 Date

The City would prefer to receive Submissions on or before September 26, 2019. The City's office hours are 8:30 am to 4:00 pm, except holidays.

3.4 Inquiries

All inquiries related to this RFEOI/SOQ should be directed, by email, to the person named below (the “City Representative”). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Richard D. Oppelt, Manager, Procurement Services
Email: purchasing@surrey.ca
Reference: #1220-050-2019-022

Inquiries should be made no later than seven (7) business days before the closing Date. The City reserves the right not to respond to inquiries made within seven (7) business days of the closing Date. Inquiries and responses will be recorded and may be distributed to all Respondents at the discretion of the City.

Respondents finding discrepancies or omissions in the RFEOI/SOQ documentation or having doubts as to the meaning or intent of any provision should immediately notify the City Representative. If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue an addendum in accordance with section 3.4. No oral conversation will affect or modify the terms of this RFEOI/SOQ nor be relied upon by any Respondent.
3.5 Addenda

If the City determines that an amendment is required to this RFEOI/SOQ, the City Representative will issue a written addendum by posting it on the BC Bid Website at www.bcbid.gov.bc.ca (the “BC Bid Website”) and the City Website at www.surrey.ca (the “City Website”) that will form part of this RFEOI/SOQ. No amendment of any kind to the RFEOI/SOQ is effective unless it is posted in a formal written addendum on the City Website. Upon submitting a Submission, Respondents will be deemed to have received notice of all addenda that are posted on the City Website.

3.6 Status Inquiries

All inquiries related to the status of this RFEOI/SOQ, including whether or not a Respondent has been selected, should be directed to the City Website and not to the City Representative.

4. SUBMISSION FORM AND CONTENT

4.1 Package (Hard Copy)

If the Respondent chooses NOT to submit by email, the Respondent should submit a Submission in a particular submittal format, to reduce paper, encourage our recycled product expectations, and reduce package bulk. Bulk from binders and large packages are unwanted. Vinyl plastic products are unwanted. The City also has an environmentally preferable purchasing commitment and seeks a package format to support the green expectations and initiatives of the City.

Please do not use any plastic or vinyl binders or folders. The City prefers simple, stapled paper copies. If a binder or folder is essential due to the size of your Submission, they should be fully 100% recycled stock.

The City seeks and prefers submittals on 100% Post Consumer Fibre (PCF) paper, consistent with the City’s policy and the City environmental practices.

Please double-side your Submission.

Submissions should be in a sealed envelope/package, marked on the outside with the Respondent’s name, title of the Submission and reference number.

4.2 Form of Submission

There is no form to fill out. Respondents should address clearly and in sufficient depth the points below that are subject to the evaluation criteria against which the Response will be evaluated. Respondents are encouraged to respond to the items below in the order listed. Respondents should also include a short cover letter signed by the person(s) with authority to act on behalf of the Respondent. The cover letter should certify that the information contained in the Submission is true, complete and correct and indicate the Respondents
contact person(s) for the RFEOI/SOQ along with the person’s title, phone number and e-mail address.

The City is not asking for any financial proposal at this time. The City encourages responses that demonstrate a thorough understanding of the Respondent of the nature of the work and what the Respondent must do to get the work done properly.

(a) **Respondent’s Experience, Reputation and Resources**

(i) Provide a brief description of the Respondent’s current business inclusive of:
- full legal name and contact information including office address
- business telephone number, business email address and business fax number of the Respondent’s designated contact person; and
- company background, structure and ownership details.

(ii) Respondent should describe their relevant experience (breadth and depth) and qualifications in delivering Services similar to those required by this RFEOI/SOQ. Describe why this experience is relevant to this project;

(iii) Describe Respondent’s demonstrated ability to provide the Services;

(iv) Respondent should provide details of related works contracts by demonstrating an understanding and the utilization of project management principles. (e.g. budget, demonstrate successful outcomes and performance assessment); and

(v) Respondents should describe any difficulties or challenges you might anticipate in providing Services to the City and how you would plan to manage these;

(vi) Respondents should provide information on the background and experience of all key personnel proposed to undertake the Services;

(vii) Respondents should provide information on the background and experience of all sub-contractors proposed to undertake a portion of the Services;

(viii) Respondent’s references (name and telephone number). The City’s preference is to have a minimum of three references;

(b) **Respondent’s Technical Response (Services)**

(i) a narrative that illustrates the understanding of the City’s requirements and Services;

(ii) a description of sample reports that you would anticipate providing the City’s management team, including their relationship to project milestones and the method of delivery (electronic, paper, e-mail, other);
(iii) Respondent should describe demonstrated strength and relevant resources, capability and capacity to carry out the Services; and

(iv) Respondent should describe their communication strategy or other tool for reporting client logs, processing complaints and follow-ups with clients.

4.3 Signature

The Submission should be signed by a person authorized to sign on behalf of the Respondent and include the following:

(a) If the Respondent is a corporation then the full name of the corporation should be included, together with the names of authorized signatories. The Submission should be executed by all of the authorized signatories or by one or more of them provided that a copy of the corporate resolution authorizing those persons to execute the Submission on behalf of the corporation is submitted;

(b) If the Respondent is a partnership or joint venture then the name of the partnership or joint venture and the name of each partner or joint venturer should be included, and each partner or joint venturer should sign personally (or, if one or more person(s) have signing authority for the partnership or joint venture, the partnership or joint venture should provide evidence to the satisfaction of the City that the person(s) signing have signing authority for the partnership or joint venture). If a partner or joint venturer is a corporation then such corporation should sign as indicated in subsection (a) above; or

(c) If the Respondent is an individual, including a sole proprietorship, the name of the individual should be included.

5. EVALUATION AND SELECTION

5.1 Evaluation Team

The evaluation of Submissions will be undertaken on behalf of the City by an Evaluation Team. The Evaluation Team may consult with others including City staff members, third party consultants and references, as the Evaluation Team may in its discretion decide is required. The Evaluation Team will give a written recommendation for the selection of a Preferred Respondent or Preferred Respondents to the City.

5.2 Evaluation Criteria

The Evaluation Team will compare and evaluate all Submissions to determine the Respondent’s strength and ability to provide the Services to the City in order to determine the Submission(s) is most advantageous to the City, using the following criteria:
(a) **Experience, Reputation and Resources**  
The Evaluation Team will consider the Respondent's responses to items in Section 4.2(a) – Form of Submission; and

(b) **Technical**  
The Evaluation Team will consider the Respondent’s responses to items in Section 4.2(b) – Form of Submission.

The Evaluation Team will not be limited to the criteria referred to above, and the Evaluation Team may consider other criteria that the team identifies as relevant during the evaluation process. The Evaluation Team may apply the evaluation criteria on a comparative basis, evaluating the Submissions by comparing one Respondent’s Submission to another Respondent’s Submission. All criteria considered will be applied evenly and fairly to all Submissions.

The City currently anticipates that it may carry out a more formal procurement process for release to multiple qualified Respondents.

### 5.3 Litigation

In addition to any other provision of this RFEOI/SOQ, the City may, in its absolute discretion, reject a Submission if the Respondent, or any officer or director of the Respondent submitting the Submission, is or has been engaged directly or indirectly in a legal action against the City, its elected or appointed officers, representatives or employees in relation to any matter, or if the City has initiated legal action against any officers or directors of the Respondent.

In determining whether or not to reject a Submission under this section, the City will consider whether the litigation is likely to affect the Respondent’s ability to work with the City, its consultants and representatives and whether the City’s experience with the Respondent indicates that there is a risk the City will incur increased staff and legal costs in the administration of an agreement if it is awarded to the Respondent.

### 5.4 Additional Information

The Evaluation Team may, at its discretion, request clarifications or additional information from a Respondent with respect to any RFEOI/SOQ, and the Evaluation Team may make such requests to only selected Respondents. The Evaluation Team may consider such clarifications or additional information in evaluating a Submission.

### 5.5 Interviews

The Evaluation Team may, at its discretion, invite some or all of the Respondents to appear before the Evaluation Team to provide clarifications of their Submissions. In such event, the Evaluation Team will be entitled to consider the answers received in evaluating Submissions.
6. GENERAL CONDITIONS

6.1 No City Obligation

This RFEOI/SOQ is not a tender and does not commit the City in any way to select a Preferred Respondent(s), or to proceed to negotiations for an agreement, or to award any agreement, and the City reserves the complete right to at any time reject all Submissions, and to terminate this RFEOI/SOQ process.

6.2 Respondent’s Expenses

Respondents are solely responsible for their own expenses in preparing, and submitting a Submission, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from this RFEOI/SOQ. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Submission, or participating in subsequent proposal requests, negotiations for an agreement, or other activity related to or arising out of this RFEOI/SOQ.

6.3 No Contract

By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Respondents expressly agree that no contract of any kind is formed under, or arises from this RFEOI/SOQ, prior to the signing of a formal written Contract.

6.4 Conflict of Interest

A Respondent shall disclose in its Submission any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

6.5 Solicitation of Council Members and City Staff

Respondents and their agents will not contact any member of the City Council or City staff with respect to this RFEOI/SOQ, other than the City Representative named in section 2.3, at any time prior to the award of an agreement or the cancellation of this RFEOI/SOQ.

6.6 Confidentiality

All Submissions become the property of the City and will not be returned to the Respondent. All Submissions will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the Freedom of Information and Protection of Privacy Act of British Columbia.
7. CITY DISCLAIMER

a. The information in this RFEOI/SOQ and any further supporting documentation is provided for reference purposes only. It is the responsibility of interested parties to confirm the accuracy and applicability of this information. All costs related to updating or acquiring additional information shall be born solely by the Respondent. The information contained in this RFEOI/SOQ has been prepared, in part, on information provided by others, and such information is believed to be accurate and reliable. However, by its receipt of this RFEOI/SOQ, each Respondent remises, releases, and forever discharges the City and its representatives (including staff and consultants and other professional advisors) from any and all claims which such person has, have, or may hereafter have arising out of any information contained herein. Any party who intends to submit a response to this RFEOI/SOQ is specifically invited to independently verify the accuracy of the information contained herein.

b. The City shall not be obligated to review or accept any Submission and may reject any or all Submissions without giving reasons, therefore.

c. All negotiations and discussions with Respondents are on a “without prejudice” basis and cannot be construed as an agreement, and/or otherwise unless expressly approved by City Council and a written agreement is signed by the City.

d. The City may negotiate with any one or more of the Respondents without having any duty or obligation to advise or allow any other Respondents to vary their Submission or otherwise negotiate with the City.

e. The City may enter into discussions to clarify issues related to any Submission. If at any time the City reasonably forms the opinion that a mutually acceptable agreement is not likely to be reached, the City may give notice terminating discussions, but is under no obligation to do so.

f. The City does not authorize any other person or agency to represent the project on its behalf without the prior written approval of the City.

g. By submitting a Submission and participating in the process as outlined in this RFEOI/SOQ, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFEOI/SOQ process.

8. DISCLAIMER

Notwithstanding anything contained herein, the Respondent agrees that he shall take all necessary steps to confirm the accuracy of this RFEOI/SOQ and agrees that the City shall have no liability whatsoever in respect of any losses or damages of any kind howsoever arising in relation to this RFEOI/SOQ.
PROJECT TITLE: REVIEW OF SURREY’S POPULATION AND EMPLOYMENT MODEL

REFERENCE NO.: 1220-050-2019-019

1. GENERAL PROJECT INFORMATION

The City of Surrey (the “City”) seeks an experienced and qualified consultant to provide assistance in reviewing and improving the City’s current Population and Employment Model (the “Model”).

The City maintains a Model that supplements the demographic information available once every five years through the Census. The Model allows the City to generate population and employment estimates for intercensal years as well as for custom areas that do not align with standard Census geographies. It also provides the ability to generate projections which are not available from the Census.

The foundation of the Model is a Geographic Information System (GIS) based building inventory which is a record of all existing buildings in Surrey. The inventory captures information on building characteristics such as building type/use, size, age and number of dwellings, as well as estimates of population and employment. A second GIS dataset tracks development capacity in Surrey at the lot or block scale. Collectively, this information makes it possible to generate population, employment estimates and projections that are spatially and temporally granular. Based on a robust GIS-based building inventory, the strength of the Model is that it is an effective tool in the real time geographic allocation of both residential and non-residential permit activity.

Notable applications of the information generated from the Model include:

- Land Use Plan build out scenarios
- Engineering traffic studies/modelling
- Transit corridor studies
- Industrial Land Inventory
- School Board student enrollment projections
- RCMP and Fire service planning

As demonstrated, the Model’s output is an input to numerous internal and external work programs. Therefore, it is important that it remains a credible source of data. In the spirit of continuous improvement, the Model could benefit from reduced complexity and increased transparency to improve the accuracy and responsiveness of the data.

2. BACKGROUND

As described above the Population and Employment Model provides data at a more temporally and spatially granular level than the Census. The Model is comprised of two main components. The first is a building inventory dataset that contains information on every building in Surrey. This dataset is the basis of Surrey’s current population and employment estimates. The second dataset tracks development capacity and is used to project population and employment growth. Both datasets are spatially referenced and are stored in a GIS spatial database (geodatabase).
Existing Population and Employment Estimates

The building inventory was created using a combination of property records supplied by the British Columbia Assessment Authority (BCAA) and information from the City’s building permit database, AMANDA. The inventory is updated on a monthly basis with new building permits that have been issued. The building inventory is also refined from time to time based on information available from a variety of sources including the Census, aerial photography and the City’s Secondary Suite Bylaw Enforcement program.

For the purpose of estimating population, various attribute information is captured for each building including the type of building and the number of dwellings. This ranges from zero for non-residential buildings to several hundred for the largest apartment buildings. This information when combined with Census average household size data yields the population estimates. For example, the estimated population of a hypothetical area comprised of 25 single family homes and 10 townhouses would be 25 multiplied by the average household size for single family homes plus 10 multiplied by the average household size for townhouses. (The City obtains average household size information that is specific to different housing structural types from Statistics Canada).

While this is a straightforward and logical approach there are several areas of uncertainty. These include:

- Adequacy of average household sizes; the Census’ structural types differ somewhat from Surrey’s housing categories leading to concerns about the applicability of the data;
- Completeness of secondary suite unit counts; many secondary suites exist without the authorization and knowledge of the City; and
- Inflated unit counts that do not account for construction time, absorption time and latent vacancy; building permit issuance is currently the trigger for a building’s inclusion in the inventory rather than its completion or occupation.

For the purpose of estimating employment each building’s floor area is captured in the inventory. For buildings constructed since 2000 this information comes from building permit records. For older buildings the floor area is estimated from aerial photography or may have originated from the BCAA data. The Model estimates employment associated with each building using a method that translates employment floor area to number of employees by applying supplemental data on average floor area per employee. These averages vary by the category of employment taking place. In theory, dividing a building’s floor area by the average floor area per employee (for the relevant employment category) will yield an estimate of the employment associated with the building.

This supplemental data is not specific to Surrey and comes from various sources. There are questions as to the robustness of this approach with concerns around the following:

- The representativeness of the supplemental data to Surrey’s context; information on average floor area per employee is difficult to source and relies on datasets that exist for disparate, unrelated purposes;
• Buildings that are incorrectly categorized for historic reasons or because its use has changed; Surrey’s inventory of non-residential buildings is large and therefore onerous to verify; and

• Buildings that do not fall into any categories for which there is supplemental data including farm-related employment; increasingly there are also mixed-use buildings that house multiple types of employment which further complicates the issue.

As a result, staff question whether there is a better (or “industry standard”) method of estimating employment at a granular scale. Finally, as with the issue of inflated unit counts when estimating population, there is the also the concern around the Model inflating employment floor area as it does not account for construction time and latent vacancy.

Future Population and Employment Projections

At the municipal-level (and specifically in the case of Surrey because it is a high-growth municipality), more insight into future population and employment can be gained from real estate and development trends than from fertility rates and death rates. For this reason, Surrey’s population and employment projections are generated based on assumptions related to development capacity.

Surrey’s development capacity dataset integrates various types of information, including land use, land tenure, property assessment and aerial photography, to provide at a granular level an indication of development potential. It does so by classifying lots and blocks as being either “built out” or having capacity for development (including redevelopment). For residential areas with development potential, capacity is quantified in terms of dwelling units while for non-residential areas it is in terms of employment floor area. These capacities are based on approved land use plan densities and/or other development assumptions.

Accompanying this capacity information are assumptions around the pace of development and the timing of ultimate build-out which together form the basis of Surrey’s population and employment projections. Such assumptions are as much a matter of City policy as it is of development trends. Nonetheless, it would benefit the Model for any development-related assumptions to be informed, to a greater extent than at present, by current trends (or other intelligence).

To arrive at population projections, the Model applies average household sizes as it does for the current population estimates. In doing so, the Model does not account for potential changes to average household size which might accompany demographic shifts and new trends in housing and household types.

For employment projections, the current practice is to translate employment floor area to number of employees in much the same way as for estimates of current employment. However, there is little certainty that planning for employment areas will result in employment according to the anticipated timeline and intensity. This leads to the question of what is the most credible way in which to project employment. Also, the Model does not attempt to account for new trends related to employment and industry.

In addition to the above, there are concerns around the Model’s transparency and the ability to explain its workings. This is in part a record-keeping problem. For example, the data may reflect the assumptions that have been applied as well as any adjustments, but the assumptions themselves (and adjustments) have not been systematically tracked to date. This is important as it
is necessary from time to time to adjust assumptions in the Model to respond to new policy
directions such as changes to transit or infrastructure plans.

Presently, it is challenging to update the Model to reflect new assumptions. It has also proven
onerous to adjust its components so that it remains within agreed-upon control totals for population
and employment.

3. PROJECT OBJECTIVES

3.1 In the City’s efforts to continually enhance and streamline our processes and encourage
innovation, we recognize there is opportunity to improve the Model. The City of Surrey
seeks to protect the credibility of its Population and Employment Model, and it aims to do
so by ensuring that it produces accurate information according to a defensible
methodology. To this end, the City wishes to engage the services of a qualified consultant
with a background or understanding of demography, the construction and real estate
industries, economic and employment analysis, and Geographic Information Systems to:

• Evaluate the City’s current Population and Employment Model methodology; and

• Provide recommendations that will assist the city in improving the defensibility and
management of the data structure and reliability of population and employment
projection outcomes.

3.2 The primary objective of the study is to review Surrey’s existing Population and
Employment Model and provide recommendations on improving the Model’s basic
structure, accuracy and reliability. The recommendations should be based on current best
practices and/or opportunities to innovate and provide short and long-term opportunities to
improve the Model.

The central requirement of the Model is its ability to generate population and employment
estimates for the current year and projections for future years at a sufficiently granular (i.e.
building or lot) level. While fulfilling this requirement it is desired that the Model have the
following characteristics. The methodology should:

• Be coherent and understandable (not overly complex)
• Require a reasonable level of effort to maintain
• Facilitate transparent record-keeping
• Be based on a defensible methodology that incorporates credible assumptions
• Be flexible and responsive to changing assumptions
• Address the complexity of our work and allow for testing of multiple scenarios

While making refinements to the existing Model is the preferred option, the City is also open to
recommendations that involve more significant changes to the Model.

4. SCOPE OF STUDY

The anticipated scope of study may include, but is not limited to, the following tasks:

(a) Meet with staff (as needed) to understand how the current Model functions. This includes
staff from Planning & Development, Engineering and Taxation Departments.
(b) Review background materials as they relate to the City’s Model.

(c) Engage with stakeholders to understand data needs as it relates to the Model’s output. Stakeholders include representatives from Metro Vancouver, Surrey School District, Surrey Fire Services and others, as appropriate. Provide an engagement results summary.

(d) Provide a report that includes the following:

   i. **Evaluation/Assessment** of Current Model including, but not limited to:
      
      a. A review of the pros and cons of the current methodology for establishing baseline data and forecasting population and employment projections; and

      b. A review of the options for potential improvements to the methodology including the impacts of the modifications on the Model.

   ii. **Best Practices Review** including an examination of how comparable large or high growth municipalities establish baseline data for population and employment as well as growth forecasts using internal and external data sources.

   iii. **Recommendations** that provide a roadmap for improvements to achieve a Model with the characteristics outlined in section 3.2 Project Objectives;

      a. Recommendations should also address concerns outlined in Section 2 and, the following Issues:

         • How to improve building categorization methodology so that the process is more efficient, and automated where appropriate, while also ensuring the outputs are reasonably accurate;

         • Best approach(es) to incorporate residential and non-residential development-related trends and assumptions into the Model to project employment and residential growth;

         • Any significant gaps, including emerging trends (e.g. co-working spaces, industry automation, differing regional land values etc.) that are not reflected in the Model; and

         • How to build or restructure the Model to incorporate an ability to systematically record and track adjustments and assumptions.

      b. Recommendations should address implementation factors including:

         • Short and long-term improvements, and phasing where appropriate;

         • Priority areas/actions for implementation;

         • Associated costs of recommended actions;
• Advise on who best to undertake various components of the work, for example external experts or internal staff. Where staff undertake the work, the recommendations should be explicit and actionable;

• Consider technology, data, or training solutions;

(e) There may be opportunity for including implementation of some recommendations within the scope of work. Proponent should outline if there is opportunity for this within the RFP budget.
ATTACHMENT 1 - INFORMATION MEETING RESPONSE FORM

REVIEW OF SURREY’S POPULATION AND EMPLOYMENT MODEL

The City prefers to receive this invitation response form by fax to 604-599-0956 and/or e-mail to purchasing@surrey.ca before September 12, 2019:

TO: Richard D. Oppelt, Purchasing Manager
Email: purchasing@surrey.ca

1. RESPONDENT’S INFORMATION:

Legal Name of Respondent: __________________________________________________________
Business Address: ________________________________________________________________
City: __________________________________________________________
Business Telephone: _____________________________________________________________
Business Fax: _________________________________________________________________
Business E-Mail Address: __________________________________________________________
Contact Person: _________________________________________________________________

3. RESPONDENT’S REPRESENTATIVE:

Indicated below is the name of the person(s) for which our organization intends to send for an Information Meeting.

<table>
<thead>
<tr>
<th>Company Representative/Name</th>
<th>Title</th>
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Signature: __________________________________________________________

Date: ____________________________________________________________