



Evaluation of the E & N Railway Corridor

Terms of Reference

April, 2009

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Purpose

BC MoT seeks a qualified consultant to evaluate freight, passenger (long haul), excursion and commuter (short haul) movement on the Southern Railway of Vancouver Island. While the freight and passenger movement would be exclusive to this evaluation, BC MoT wishes to engage BC Transit through the Victoria Regional Rapid Transit study to understand the implications of a commuter rail service within the Capital Regional District (CRD). BC Transit will provide the service objectives and targets for commuter rail service within the CRD region; and BC MoT will provide the costs for infrastructure and implementation. All this work is being undertaken to understand and evaluate the opportunities available for economic growth on the island as it would pertain to these three areas individually and as a network. These efforts are to provide a framework and context for local stakeholders, service agencies, and government partners to establish a business plan for investment and service delivery for the Southern Railway of Vancouver Island.

Phase 1 of this study will undertake a comprehensive market analysis of freight, passenger, excursion and commuter movements. This detailed analysis will provide information for existing and forecast demand in all market segments. This includes origin and destination data, trip purpose, commodity type, linkages to tourism and businesses and other relevant data. Phase 1 will also provide a detailed evaluation of the base asset condition and environmental aspects. Commuter movement will be analyzed in coordination with BC Transit and the Victoria Regional Rapid Transit study. BC Transit would provide details on the integration with the existing/proposed transit network, stations, service delivery objectives (frequency, passenger loads) and BC MoT will provide costs to build a commuter rail to meet those objectives. Phase 2 of this study would develop a business plan to develop options to guide investment on the island as it relates to freight, passenger, and commuter movements presented in the previous phase. Phase 2 will only be initiated on the advice of the stakeholder committee and BC MoT at the conclusion of Phase 1.

Background

The Vancouver Island region (population of approximately 800,000) has continued to show strong signs of growth within the Province. The Capital Region (6%) especially has demonstrated growth higher than the provincial average (5.3%) with five of the top ten municipalities with the highest 2001-2006 growth being View Royal, Langford, Courtenay, Sooke, and Ladysmith. Vancouver Island's economy outside Victoria is largely dominated by the forestry industry, with tourism and fishing also playing a large role. Transportation has played an important role in developing the island with modes of Marine, Rail, Road, and Air each contributing to the economic growth experiences on Vancouver Island.

The Southern Railway of Vancouver Island (the railway), is a short line railway in British Columbia, Canada. It consists of two tracks: a 225km track between Victoria and Courtenay, with a 64km branch line from Parksville to Port Alberni and from just south of Nanaimo to the railway's main rail yard and barge slip (dock) on the Nanaimo waterfront. The railway is owned by the Island Corridor Foundation (ICF) and operated under contract by the Southern Railway of Vancouver Island (SVI).

SVI (on behalf of VIA Rail Canada) runs regular passenger train service (return) with rail diesel cars from Victoria to Courtenay. The train has scheduled stops at Duncan, Nanaimo, and Parksville, with many other flag stops (stops on request) along the way. SVI operates two Subdivisions and one Spur: the Port Alberni Subdivision (60 km); the Victoria Subdivision (225 km) and the Wellcox spur (5 km). SVI currently connects with CPR via rail barge between Nanaimo and Tilbury and interchanges with four North American Class One (CPR, CN, BNSF and UP) railways at six locations.



*Excerpted from http://www.sryrailink.com/about/vancouver_isl_map.html

The Vancouver Island Region has an interest in expanding freight movement on the island. Freight movements dropped drastically in early 2001 primarily due to the loss of a major carrier (Catalyst Pulp Mill – Port Alberni) that saw cars drop from over 8500 to less than 1000. The current estimate of freight movement is closer to 1225 cars. The primary driver of the Island's economy has been the forest industry but emerging markets (economy driven) in both mining (minerals) and agriculture (feed and fertilizers) could present a more balanced portfolio of freight products that would freight traffic from Asian markets to North America via the Island railway and barge operations to the mainland.

This assignment requires an understanding and assessment of the current and forecasted freight passenger (long haul), excursion and commuter rail (short haul) as they relate to travel within the municipalities and for inter-municipal and inter-regional travel. BC Transit, through its work on

the Victoria Regional Rapid Transit study, represents a key opportunity for a commuter rail study to plug into a more comprehensive transit market analysis including associated feed networks and the overall regional travel assessment. This will also likely require a comparative look at combined operations of a commuter/passenger rail service along with assessing just a commuter rail service.

Once demand and the market is accurately understood, a business plan using base case scenarios should be utilized to forecast the potential return on investment for increasing service levels on all fronts individually and as a network. This business plan should look at linking various available opportunities in freight, tourism, business development (both specific to the project(s) and community oriented, employment, land use planning and environmental). The business plan would support these by analyzing the options available and the economic performance and sustainability each leading option presented.

Scope of Work

The Southern Railway of Vancouver Island will consist of 2 phases as well as a communications/consultation plan:

1. Phase 1: Foundation Paper
 - a. Overview of governance, ownership, operations, and policy.
 - b. Freight Analysis
 - c. Passenger Analysis
 - d. Seasonal and/or Eco-tourism Opportunities
 - e. Evaluation of Commuter Rail Service
 - f. Updated Baseline Condition Report
2. Phase 2: Development of Business Plan

Phase 1: Foundation Paper

The foundation paper should achieve the following:

In Overview

- A review of all plans, policies and objectives related to transit, transportation, land use and greenhouse gas emissions on Vancouver Island. This would include summarizing information from all partners with respect to their specific agencies and or stakeholders.
- Reviewing the institutional arrangements, current ownership, and operations that exist today and identifying any amended arrangements that may be needed for the coordinated planning, management and provision of freight and transit services on Vancouver Island.
- Review the land use policies and objectives included in Official Community Plans (OCP's) for Vancouver Island municipalities. Comment on the current alignment of the corridor in relation to these OCP's and any other available land use planning available in terms of rail-oriented development opportunities.

Market Analysis of Freight Movement

Describe current freight markets, demand, and forecast future markets for 2020 and 2030. The work should comprise of activities such as

- Provide some context on freight markets utilizing the SVI corridor including types of freight and quantifying the freight markets both existing and emerging.
- Examining the existing market and demand for freight specifically on the island by using any available freight data or by stating any additional research or freight surveys that would be required to demonstrate the current freight market. Identifying (i) both “captive” and “choice” freight markets (“captive” being those industries that have no feasible alternative and “choice” being industries that may use rail if given the right incentives). Note, that to identify the “choice” market with any amount of reasonableness, it will be important to look at factors including (but not limited to) type of freight available, current economic conditions in the world markets, Origin-Destination models to assess freight travel patterns, and identifying attractors to encouraging freight movement.
- Examining movements of freight along the corridor to identify origin-destinations.
- Examine supply chain linkage to multi-modal movements.
- Identify current freight users and quantity freight tonnage, type, and value.

Market Analysis of Passenger Movement (long-haul)

Describe current transit markets for passenger movement on long-haul services (VIA Rail Canada) and forecast future markets for 2020 and 2030. The work should comprise of activities such as:

- Examining the existing market and ridership for long-haul service on the island by using any available ridership data or by stating any additional research or travel surveys that would be required to demonstrate the current passenger market. This includes using any available ridership data, general travel surveys, passenger surveys and public surveys. It is important to identify influencing factors including (but not limited to) tourism, availability of alternatives (ie rail versus highway travel), travel patterns and travel time, fair cost, and any other transit trip attractors.
- Identifying any existing and emerging demand-side considerations that will also affect modal choice and ridership such as ghg-reduction, fuel price or availability trends, etc.
- Examining projected trends in intercity travel, tourism, land use, and/or demographics and how this will influence the future demand for passenger movement in the region. This includes changes in age structure, distribution of residential and commercial development, and the location of major trip generators and attractions.
- Developing forecasts of demand and desirable passenger movement levels for 2020 and 2030, including local, inter-municipal, and inter-regional service. This forecast needs to consider the impact of greatly increased transit service and new transit types (such as commuter service on the Malahat) on future passenger service demand. All other assumptions also need to be stated. (Note given the current rapid changes in fuel prices and the challenge of calibrating a model to areas where data is limited and ridership is low, the consultant should not assume that a traditional 4-part modeling exercise using a

model such as EMME 2 must be undertaken or should be used in isolation of other approaches).

Market Analysis of Seasonal and/or Ecotourism Opportunities

Describe current operations and forecast future markets that could be developed: The work may comprise of:

- This would include summarizing the current Alberni Pacific Railway.
- Summarizing the potential demand for a service like the Industrial Heritage Society Steam Train Service and the proposed Arrowsmith Explorer based on .
- Identifying other 'special' markets (or tourism type opportunities) on the island that would benefit or could be marketed to for passenger rail including First Nation cultural tourism, the financial viability or business case on perceived demand and cost of operations.
- The ability to segment the railway to achieve viable operations in these areas.

Evaluation of Commuter Rail (short-haul)

Work with BC Transit and the Victoria Regional Rapid Transit study to identify infrastructure related investments with planning level cost estimates for implementing commuter rail from West Shore to Downtown Victoria (within the CRD). BC Transit has provided preliminary details on service objectives for a notional commuter service (see below). BC Transit will also be providing further details on the integration of this commuter service with the existing/proposed transit network and plausible station locations into the study. The proponent for this study will provide costs to build a commuter rail to meet these objectives. The results of this work will be used jointly both in support of the work that BC Transit is doing with the Victoria Regional Rapid Transit study and in promoting the findings of this study. The proponent should be prepared to communicate the results both through a communications plan in this study as well as providing support to BC Transit through their communications plan.

Find below are the notional commuter (short haul) service objectives within CRD based on previous studies as a basis to begin this study:

Service Period (Eastbound/Inbound):	6:00am to 11:00am
Service Period (Westbound/Outbound):	3:00pm to 8:00pm
Minimum total travel time (Westhills-Victoria):	30 minutes (including 30-60 second stops)
Headways:	30 minutes
Daily Passenger Boarding's (one way)	700-1150 (1-2 years after start-up)
Peak hour passenger boarding (one way)	575 (1-2 years after start-up)

*Note this is exclusive of the long haul commuter rail component that needs to be considered in conjunction with this short haul commuter service.

**Note as these numbers may be further refined in greater accuracy pending the results of the Victoria Rapid Regional Transit study.

Baseline Reference Report

The Island Corridor Foundation has made available various studies and valuations of the railway that was provided as part of the asset donation agreement for assuming ownership of the railway (*See Appendix E*). These works consist of policy papers, land and improvement valuations, track and geotechnical reports, rail and track replacements cost assessments, grade crossing signal valuations, bridge and culvert evaluations, and a phase 1 environmental assessment amongst others.

The proponent will be asked to first review these documents for accuracy and completeness based on the guiding framework provided next. Second, if the reference documents provided should prove to be inadequate for the needs of this study, the proponent should prepare a supplemental document showing what further assessment would be needed to complete the framework provided next. This work would proceed at the approval of BC MoT and only if permitted under a known cost and schedule.

The following framework should be used as a guide:

Assessment Scope

The scope of the assessment of the physical plant and the right-of-way for the trackage owned by the Island Corridor Foundation on Vancouver Island shall include, but not be limited to, the following:

- (a) Victoria and the Port Alberni Subdivisions
- (b) Welcox Yard and the barge ramp
- (c) All passenger stations
- (d) All industrial spurs and sidings now serviced by the railway
- (e) Nanaimo offices and workshops
- (f) All bridges and trestles (both subdivisions)
- (g) All grade crossings including pedestrian crossings.

Assessment Criteria

The criteria used to assess the above shall be in accordance with British Columbia's railway safety legislation and those regulations, rules and standards adopted under the *Railway Safety Adopted Provisions Regulation* from Transport Canada (*see Appendix F*). A copy of these requirements can be found in *Appendix G*.

Assessment Details

The assessment of the physical plant and the right-of-way shall include, but not be limited to, the following items:

- (a) Road bed
 - (i) Drainage; and
 - (ii) Vegetation growth in the roadbed

- (b) Main Line Track Geometry Details
 - (i) Track gauge measurements;
 - (ii) Track alignment;
 - (iii) Track curvature;
 - (iv) Track elevation on curves; and
 - (v) Track surface

- (c) Main Line Track Substructures
 - (i) Condition of the track ties;
 - (ii) Weight of rail and the amount of rail wear;
 - (iii) Condition of all rail joints;
 - (iv) Condition, location and the adequacy of the rail fastenings;
 - (v) Condition, type and the amount of track ballast; and
 - (vi) Condition and the amount of wear on track switches and frogs

- (d) Bridges, Trestles, Tunnels, Culverts and Similar Structures
 - (i) Condition of the structures;
 - (ii) Ability of the structure to withstand the intended loads and train speeds; and;
 - (iii) Condition of walkways and hand railings

- (e) Yard Tracks
 - (i) Overall condition of tracks and fittings; and
 - (ii) Track layout.

- (f) Industrial Sidings and Spurs (either owned or operated on)
 - (i) Overall condition of tracks and fittings; and
 - (ii) General condition of loading and unloading facilities (for both dangerous and non-dangerous goods)

- (g) Communications Equipment
 - (i) Condition and function of radios; and
 - (ii) Condition and function of other communications equipment

- (h) Fencing and Similar Structures
 - (i) General condition of fencing and similar protection; and
 - (ii) Adequacy of fencing and similar protection

- (i) Barge Ramps
 - (i) Condition of surface and sub-surface structures;
 - (ii) Condition and function of mechanical equipment;
 - (iii) Ability of the structures to withstand loads imposed; and
 - (iv) Condition of the tracks

- (j) Grade Crossings
 - (i) Condition and configuration of sight lines; and
 - (ii) Condition of crossing surfaces

- (k) Grade Crossing Protection

- (i) Appropriate type of protection;
 - (ii) Condition of protection; and
 - (iii) Advanced warning signs, condition and location.
- (l) Pedestrian Crossings
- (i) Condition of sight lines;
 - (ii) Condition and adequacy of fencing and gates; and
 - (iii) Condition and location of signs
- (m) Wire Crossings
- (i) Condition of supporting structures; and
 - (ii) Clearances of wire crossings
- (o) Pipe Crossings
- (i) General surface condition of flammable and non-flammable pipe crossings; and
 - (ii) Signage of pipe crossings
- (p) Yard and Mainline Clearances
- (i) Between tracks;
 - (ii) In bridges, tunnels, overpasses, structures and buildings; and
 - (iii) Close clearance signage condition and location
- (q) Passenger Stations
- (i) General condition;
 - (ii) Clearances;
 - (iii) Passenger protection and signage;
 - (iv) Adequate occupancy provisions;
 - (v) Fire protection;
 - (vi) Ingress and egress location and adequacy; and
 - (vii) Platform/car interface levels and gaps
- (r) Work Shops and Offices
- (i) General condition; and
 - (ii) Adequacy for the purposes

The assessment shall contain sufficient information to permit analysis of the time and costs required to upgrade the existing railway to a level which complies with legislated safety levels and future traffic requirements.

Environmental Overview

A review of the existing Phase 1 Environmental Site Assessment provided by the ICF in efforts to describe the existing environment within the defined study area, including:

- Biogeoclimatic zone(s)
- Fish and aquatic habitat, including riparian areas
- Wildlife and wildlife habitat, including raptor nest sites

- Vegetation
- Potential presence of species at risk or provincially listed species
- Archaeological potential
- Watercourse classification

The proponent is expected to supply any environmental information that shortfalls in existing literature and is needed to meet the above framework at this high level overview. The proponent should also identify the need for additional environmental studies that may be required once a project is proposed.

Summary Report

The proponent will write a report summarizing the key findings from the working papers above and providing direction to the study on future steps. This will include commenting on what opportunities are currently available to explore through a strategic business plan and/or what strategies or pre-conditions are required before a strategic business plan in any of the movements is warranted or worthwhile exploring.

Phase 2: Development of Business Plan

The proponent, at the direction of the Ministry, may also be asked to prepare a business plan for the Southern Railway corridor. The business plan will be a guiding document that will allow stakeholders and local government to plan for strategic investment in the railway and corridor. The proponent should attempt to provide a business model that is sustainable and accounts for both revenue and cost models based on the demand provided on each business line. Benchmarks should be included as a guide to demonstrate the intervals of demand (on any business line) that make the entire system viable/sustainable. The business plan options should include a plan for staging investment if necessary and the incremental impact on benefits and costs thereof.

Communication/Consultation Plan

As part of the proposal, the proponent is expected to demonstrate an effective communications/consultation plan. The following groups have been identified below with varying levels of involvement and the proposal is expected to categorize the frequency and type of interaction that the proponent feels would be appropriate to a successful study. The proponent will be expected to liaise with these groups as and when appropriate throughout the study. **SEE APPENDIX A FOR THE PROJECT STRUCTURE**. For the purposes of this study, the proponent will work directly with the project manager (Ashok Bhatti, Ministry of Transportation and Infrastructure) for this study with a communication/consultation involving the following groups:

- The Technical Committee (TC): A group of individuals representing the technical expertise from various agencies involved with this study. This group will provide information, ongoing technical input and advice, and final approval of each of the working papers of this study. The proponent will meet regularly with this group to provide interim, draft, and final reports.
- Project Stakeholder Liaison Committee (PSLC): A group of professionals and business community leaders. Membership TBD.

- Steering Committee (SC): The SC will report directly to the project sponsor. This group will provide the project sponsor with oversight to the project to ensure the objectives of the study are met. Membership TBD.
- BC Transit - Victoria Regional Rapid Transit (VRRT) working committee: The VRRT is a vital part of the communication around the evaluation of a commuter rail service from West Shore to downtown. The proponent is expected to share information with the working committee for the VRRT project as needed and to be able to provide resources to public venues (at the direction of the BC MoT Project Manager/Project Sponsor) if needed to support work provide to the VRRT commuter rail analysis. It is the expectation of BC MoT that the proponent would meet with this specific committee a minimum of four (4) times throughout the first phase (initiation, interim, final, with one auxiliary meeting if needed).
- Public (see below).

Public and stakeholder consultation will be a critical factor in the success of this study and the adoption of any of the recommendations arising from it. The proponent will be asked to host public open houses in various communities linked to the railway operations and will be a requirement at the conclusion of Phase 1 & Phase 2. The proponent will prepare support material required for the open houses, source and book venues, and collect and incorporate feedback.

Key Deliverables

Key deliverables for this assignment are expected to include (at a minimum):

- A resilient strategic review of the Southern Railway of Vancouver Island upon which a long-term investment strategy can be developed.
- The design and implementation of an effective *Communications/Consultation Plan*. The Consultant will be expected to work with the project manager and each of the groups identified in the terms of reference. The Consultant will obtain approval from the Project Manager prior to contacting stakeholders and other outside agencies.
- The Consultant will provide a *Quality Management Plan*. This should reflect a similar type of plan that is required by the Quality Management Accord between the BC Ministry of Transportation and Infrastructure and the Consulting Engineers of BC, This plan will provide the partners with certainty relating to the deliverables with limited requirements for internal (staff level) technical reviews.
- A monthly, memo style, *Progress/Interim Report* submitted to the Project Manager(s), in electronic format, by the first Friday of the next month, clearly explaining what work has been completed, what work is in progress, what work is forthcoming, issues needing direction or clarification, and confirmation of the project schedule. These reports are to be transmitted electronically.
- The preparation and presentation of *working documents*, with one for each component described in the foundation paper. In addition, the consultant may wish to produce other working papers or other documentation describing for example, any forecasting or evaluation methodologies to be used in particular stages, if these are not detailed in the proposal. The proponent should clearly identify such opportunities and provide supplemental costs to these items. All of the Working Papers and other committed documents are to be transmitted electronically.

- The preparation and presentation of a ***Draft Final Report*** of the preliminary findings and recommendations to the Technical Steering Committee and the Peer Review Committee. Color copies of the draft final report will be required along with a .pdf version.
- The preparation and presentation of a ***Final Report*** of the study process, results and recommendations to the Technical Committee, the Project Stakeholder Liaison Committee, and the Project Steering Committee. A final report to contain a concise Executive Summary for a non-technical audience, able to stand alone, that clearly details all of the work undertaken. The report must be comprehensive and include planning analysis, option development, the evaluation framework, the evaluation process, cost estimates, recommendations, and staging.
- The report will be fully supported by tables and graphics, the listing and justification of all assumptions, data and background material compiled, and analyses undertaken. Colour copies of the final report will be required along with a .pdf version. A digital copy of all supporting data and/or working documents should also be provided, including survey results, transit market evaluations, presentations, and forecasting outputs and worksheets.
- The consultant's performance will be assessed at the end of the project and discussed at an Evaluation Meeting, in accordance the standard Ministry procedure.
- Payment to the consultant will be monthly subject to satisfactory completion of milestones as specified in the project schedule.

Resources & Schedule

The following resources should be consulted and incorporated in this study:

- Provincial Transit Plan:
www.th.gov.bc.ca/Transit_Plan/index.html
- Capital Regional District:
 - Travel Choices Strategy
<http://www.crd.bc.ca/regionalplanning/transportation/travelchoices.htm>
 - Regional Growth Strategy <http://www.crd.bc.ca/regionalplanning/growth/index.htm>
 - 2006 CRD origin Destination Household Travel Survey
<http://www.crd.bc.ca/regionalplanning/transportation/origindestination.htm>

The following resources should be reviewed and evaluated as per the requirements of the Baseline Reference Report (***See Appendix D: ICF Existing Background Materials***)

- ICF Briefing Book (2006)
- Due Diligence Asset Donation Agreements (various 2004-2006)
- Environmental Assessments
- Vegetation Management
- Others

The funding allocation for this contract will be based on the proposal selected. Those submitting responses should consider both the financial and technical weightings for the evaluation. The Partners, however, will consider recommended or additional tasks that may be deemed beneficial to the overall process by the consultant beyond any proposal received only if it is not currently identified within the terms of reference. **Any supplemental tasks not already identified in the terms of reference must be clearly identified as being provisional or separate in the proposal and the fee estimate if the proposal excludes them from the overall fee estimate.**

The timeline proposed for the completion of the study and its associated working papers is as follows:

Milestones and Date of Delivery

Milestones	Date of Delivery
Award RFP	March 2009
Interim Paper	April 2009
Draft Foundation Paper	June 2009
Phase 1: Foundation Paper	July 2009
Phase 2: Development of Business Plan	TBD

Evaluation

Mandatory Criteria

The following are mandatory requirements. Responses not clearly demonstrating that they meet them will receive no further consideration during the qualifications review process.

Criteria	
a)	The proposal must be received at the closing location before the specified closing time.
b)	The proposal must be in English and must not be sent by mail, facsimile or e-mail.
c)	(4) Hard copies of the proposal (and 1 copy on CD) must be submitted with one unaltered, completed Request for Proposals cover page including an originally-signed Proponent Section with the first copy.
d)	The Response should <u>provide two unique and specific references of projects of similar scope and size. The response should also clearly indicate who within the team structure proposed was involved in these projects and what their role/assignment was.</u> These references should be complete with <u>contact information</u> as the Ministry on behalf of the partners will contact one (or both) of the stated references for the highest scoring Response. The Ministry will not enter into a contract with any Response whose references are found to be unsatisfactory.
e)	The response includes a <u>summary of the individuals on the team proposed with specific details on their demonstrated experience in examining railways as it relates to freight, passenger and transit movements.</u> These details should be specific on what their roles/assignments have been within the various projects cited. <u>Only responses with sufficient team experience covering all three</u>

movements will be considered.

Desirable Criteria

Proposals meeting all of the mandatory criteria will be further assessed against desirable criteria. BC MoT will complete the evaluation of the proponents. This section details the criteria against which proposals will be evaluated. Proponents should ensure that they fully respond to all criteria in order to receive full consideration during evaluation.

Criterion	Individual Proposal Weighting	Combined Proposal Weighting
Financial Proposal	100	20
Technical Proposal	100	80
<ul style="list-style-type: none"> • Related Team Experience, Qualifications, & Availability 	20	
<ul style="list-style-type: none"> • Project Understanding, Identifying Key Issues, & Challenges 	20	
<ul style="list-style-type: none"> • Project Management 	5	
<ul style="list-style-type: none"> • Methodology (Including Communication/Consultation Plan) 	20	
<ul style="list-style-type: none"> • Quality management 	5	
<ul style="list-style-type: none"> • Originality / Alternatives 	10	
<ul style="list-style-type: none"> • Ability to Meet Schedule 	20	
Total		100

Financial Proposal

The financial proposal should provide two total estimates. The first estimate should be for Phase 1: Foundation Paper and the second estimate should be for Phase 2: Development of Business Plan. Both fee estimates will be combined for the overall ranking, however, BC MoT may choose to only procure consulting services for the Phase 1 work with a provision for Phase 2 to be completed at a later date if decided.

The total fee estimates (combined for both phases) for the proposal will be ranked according to the following:

- 100 Points = Lowest Proposal
- 90 Points = Second Lowest Proposal
- 80 Points = Third Lowest Proposal, etc.

Technical Proposal

The technical proposal for the entire study will be evaluated out of a total score of 100 points. To be eligible for consideration the proposal must have a minimum score of 60 points for the technical proposal. In addition, the evaluators will take into consideration the overall schedule and format of the proposal in make a final selection. While these factors are not scored, they will be considered. The submission from each proponent should use the following format for its submission:

Proposal Format

This is a milestone deliverable-based contract to be evaluated using the two-envelope system. Envelope 1 is to be clearly marked as the “Technical Proposal – Evaluation of the Southern Railway of Vancouver Island” (four copies) and Envelope 2 (one copy) as “Financial Proposal – Evaluation of the Southern Railway of Vancouver Island”. Both envelopes should be forwarded as a package clearly marked as to the name of the project and the title of the assignment.

Envelope 1 should contain information with respect to the following:

- Project understanding, identifying key issues, & challenges;
- Project Management and quality assurance structure. This includes the firm’s capacity, capability, and proponents approach to delivering this work;
- A Project Team (summary) of individual teams members proposed and their demonstrated experience in examining railways as it relates to freight, passenger and transit movements.
- Project Team (detailed) with related experience, qualifications, and availability. The names, responsibilities, and location of staff that would be assigned to this project. Those working for the consultant and those working for sub consultants should be identified along with the type of tasks to be undertaken by the individuals. It is also required that a list current project commitment by proposed project team members;
- Methodology proposed for completing the study. The proponent should include any innovative or alternative options they feel would assist in completing this study;
- Two references for work of a similar scope and size; and
- Project milestones and schedule.

The fee schedule in Envelope 2 only should include the following information:

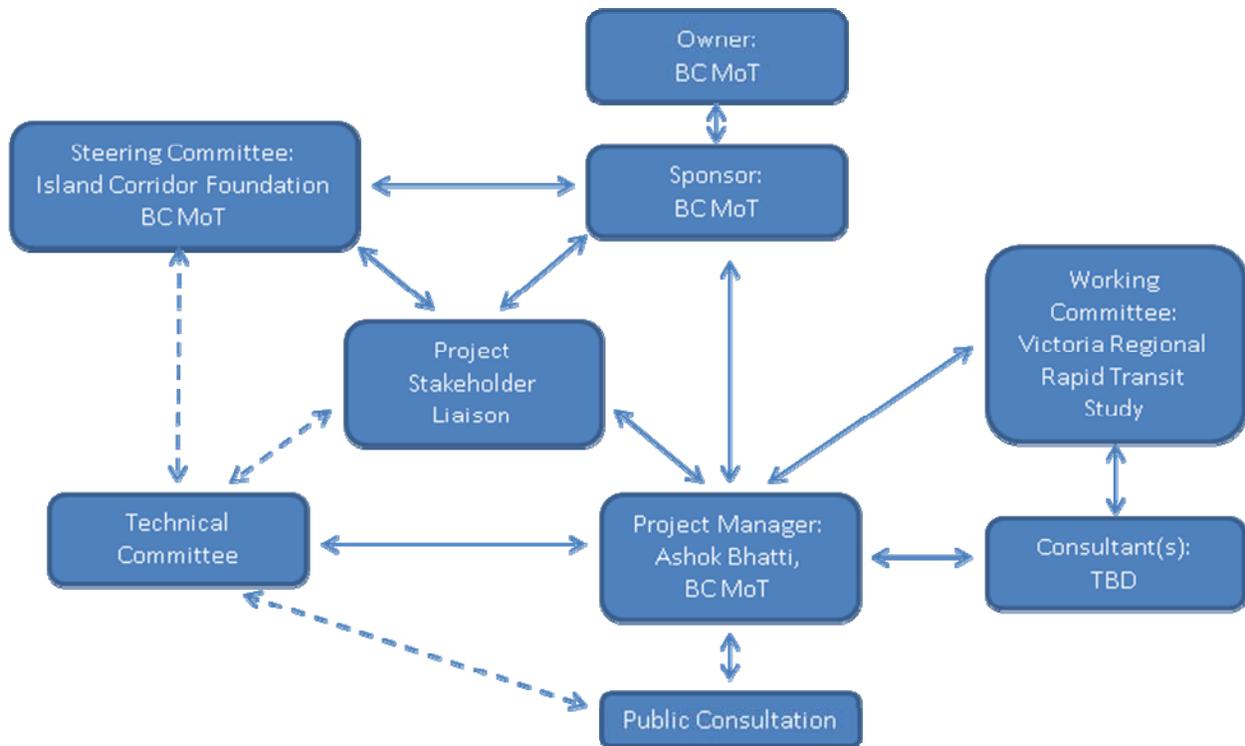
- Total Fee estimate for Phase 1: Foundation Paper
- Total Fee estimate for Phase 2: Development of Business Plan
- Hourly rates for all staff to be included in the proposal;
- Hours assigned to each staff member and sub-consultant for each of the identified list of tasks; and
- Any other anticipated general costs and disbursements.

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- An unaltered, completed and signed RFP cover page including Proponent Section;
- Table of contents including page numbers;
- A short (one or two page) summary of the key features of the proposal; and
- The body of the proposal, i.e. the “Proponent Response”.

***THE TECHNICAL PROPOSAL SHOULD BE NO MORE THAN 40 PAGES (EXCLUDING RELEVANT APPENDICES).

Appendix D: Project Structure



Appendix E: ICF Existing Background Materials

To be used as needed to complete the requirements of the study:

ICF BRIEFING BOOK (2006)

Summary of Current Status

Foundation Bylaws and Application for Incorporation

The Benefits and Challenges of A Partnership for Greater Community Control of the E&N Transportation Corridor

Meyers Norris Penny - Consulting Report for Vancouver Island Railroad

Vancouver Island Railway Development Initiative: Summary of Round Table Discussions

BACKGROUND POLICY PAPERS

Establishing a Charitable Foundation for the Purpose of Owning and Operating the E&N Railway Corridor

Taxation Issues Affecting the Vancouver Island Railway

The Management of Infrastructure on the Vancouver Island Railway

Construction and Maintenance of Railway Crossings on Vancouver Island

Railway Stations and Historic Structures on the Vancouver Island Railway

Regulations on Discontinuance Affecting the Vancouver Island Railway

Urban Transportation Showcase Program – Expression of Interest

DUE DILIGENCE ASSET DONATION AGREEMENTS

Due Diligence Summary, March 2004

BUSINESS PLAN 2005-2009

E&N Railway Valuation Study, 2004

Land and Improvements Valuation – IBI Group

Track and Geotechnical Assessment Report – Earth Tech (Canada) Inc.

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Appendix F: Regulatory Materials Overview

Regulatory Overview

This document addresses the *Baseline Reference Report*.

The Ministry of Transportation and Infrastructure has regulatory responsibility for the operations of the Southern Railway of Vancouver Island operating on the right-of-way owned by the Island Corridor Foundation.

In 2004, the Ministry, under the *Adopted Provisions Regulation* (BC), adopted certain parts of the federal railway safety legislation and then subsequently delegated the administrative of these regulatory requirements to the British Columbia Safety Authority, under the *Administration Delegation Regulation* (BC).

Reference Material (*See Appendix G Reference Material*)

This document includes reference material in order to provide a framework for guiding a consultant through a conditional assessment and analysis of the infrastructure of the corridor. A variety of investment gradients are needed to rehabilitate the existing line if it is to be used for moving freight or if it is to be upgraded for future markets.

Application of the *Railway Safety Act*

Material referenced in this document has been adapted from the adopted *Railway Safety Act* (Canada), its associated Regulations, Rules and Standards and the *Design and Performance Standards for Commuter Railways*, the draft guidelines developed by BCSA for use by commuter railways operating or intending to operate in British Columbia.

Section 4(3) of the adopted *Railway Safety Act* states that:

References to proposed railway works

A reference in this *Act* to a proposed railway work shall be construed, in a case where a person proposes to alter an existing railway work, as meaning the railway work as proposed to be so altered.

Thus, the *Act* requires that alterations to existing railway works shall comply with the relevant requirements of the *Act*, as detailed in Part 1, *Construction or Alteration of Railway Works*.

Application of the Referenced Material

While the enclosed material is comprehensive and covers many potential alterations necessary for the rehabilitation of the right-of-way and its associated substructures, it is not possible to address alterations which may arise as a result of this assessment. Consequently, the consultant should consider Section 7(2.1) of the *Act*, which states that:

Formulation or revision of standards

A railway company shall file with the Minister for approval any engineering standards in respect of any matter referred to in subsection (2) that it proposes to formulate or revise on its own initiative.

This section recognizes that compliance with some of the associated engineering standards may not provide an acceptable level of safety for a particular railway's operation. If the consultant intends to formulate any engineering standards on behalf of the railway, the consultant should seek the Minister's approval prior to including them in the assessment.

Conclusion

This material provides only a baseline for the assessment. It is not possible to cover all potential alterations to the railway until such time as the consultant has completed the assessment. As a result, during the assessment phase, the consultant should maintain communication with the Railway Safety Branch of the BC Safety Authority for clarification of technical requirements.

Reference Materials Submitted by:

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Appendix G: Reference Materials