

REQUEST FOR PROPOSALS

Living Lakes Canada Society



Issued: March 30, 2026

Closing Location:
Nelson, British Columbia

Closing Date and Time:
April 27, 2026 at 11:00 PM PST

Georgia Peck
Program Manager
FIMP@livinglakescanada.ca

TABLE OF CONTENTS

1	PART 1 – INVITATION & INSTRUCTIONS TO PROPONENTS	3
1.1	Executive Summary	3
1.1	Request for Proposal Terminology	3
1.2	Proposal Documents	4
1.3	Inquiries and Clarifications	4
1.4	Examination of Sites and Local Conditions	4
1.5	Mandatory Site Visit	4
1.6	Proposal Closing Date, Time and Location	5
1.7	Proposal Submissions	5
1.8	Ownership of Proposals and Freedom of Information	5
1.9	LLC Right to Accept or Reject Proposal	5
1.10	No Claim for Compensation	6
1.11	Conflict of Interest	6
1.12	Anti-Collusion, Fraud & Corruption	6
1.13	Confidentiality	6
1.14	Irrevocability and Acceptance of Proposal	6
1.15	Irregularities and Informalities	7
1.16	Discrepancies or Omissions	7
1.17	Modification of Terms/Addenda	7
1.18	Liability for Errors	7
1.19	Basis of Contract Award	7
1.19.1	General	7
1.19.2	Project Specific	9
1.20	Definition of Contract	9
1.21	Form of Contract	9
2	PART 2 – SPECIFICATIONS	10
2.1	Introduction	10
2.2	Background	11
2.2.1	Living Lakes Canada	11
2.2.2	Okanagan Indian Band	12
2.2.3	FIMP Project	12
2.3	Scope of Work	12
2.3.1	Instructions to Proponents	12
2.3.2	Key Resources	13
2.3.3	Objectives	15
2.3.4	Deliverables	16
2.4	Schedule	18
2.5	Cost	18
3	PART 3 – PROPOSAL SUBMISSION	18

3.1	Proposal Format	18
3.2	Proposal Content	19
3.3	Proposal Evaluation Criteria	19
4	APPENDIX A - Consulting Services Agreement	20
5	APPENDIX B - Year 1 Study Area	21

TABLES

Table 1.	Project Schedule	4
Table 2.	Project Scoring Criteria and Weighting	10
Table 3.	Key Resources	14

1 PART 1 – INVITATION & INSTRUCTIONS TO PROPONENTS

1.1 Executive Summary

Request for Proposal

The Living Lakes Canada Society (LLC) is requesting proposals from qualified agencies to survey Okanagan Lake, in the Okanagan Region of British Columbia. This project is co-led by the Okanagan Indian Band (OKIB), Westbank First Nation (WFN) and Living Lakes Canada. For the purpose of this Request, proposals should be directed to Living Lakes Canada.

Timeline of milestones and deliverables:

Table 1. Project Schedule

Name	Deadline	Description
Request for Proposal Opens	March 30, 2026	Submissions accepted for this Request for Proposal.
Request for Proposal Closes	April 27, 2026	Submissions received after this date will not qualify for review.
Contract Awarded	May 4, 2026	Selected proponents will be notified via email.
Contract Executed	May 11, 2026	Contracts must be signed by LLC and selected proponents. Valid proof of insurance must be provided by the Consultant to LLC.
Milestone 1 (M1)	Jan 1, 2027	Draft Rate-of-Change Analysis submitted to LLC for review and comment.
Milestone 2 (M2)	Feb 15, 2027	Draft memorandum submitted to LLC for review and comment.
Deliverables Submitted	Mar 31, 2027	All final deliverables submitted to LLC.

1.1 Request for Proposal Terminology

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

Throughout this Request for Proposal, terminology is used as follows:

- a) **“Contract”** means the written agreement resulting from this Request for Proposal executed by LLC and the Consultant;
- b) **“Consultant”** means the successful Proponent to this Request for Proposal who enters into a written Contract with LLC;
- c) **“Must”** or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;

- d) **“Proponent”** means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal;
- e) **“Should”** or **“desirable”** means a requirement having a significant degree of importance to the objectives of the Request for Proposal;

1.2 Proposal Documents

It is the responsibility of the Proponent to ascertain that they have received a full set of Proposal documents. Upon submission of their Proposal, the Proponent shall be deemed conclusively to have been in full possession of a full set of Proposal Documents.

1.3 Inquiries and Clarifications

It is the responsibility of the Proponent to thoroughly examine the documents and ensure that the requirements contained are fully understood.

Requests for clarifications or additional information related to this Request for Proposal should be directed, **in writing**, to the following person:

Georgia Peck
Program Manager
FIMP@livinglakescanada.ca

Information obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be distributed to all Proponents at LLC option.

1.4 Examination of Sites and Local Conditions

The Proponent must satisfy themselves as to the practicability of executing the work in accordance with the Contract, and shall be held to have satisfied themselves in every particular before making up a Proposal, by inquiry and by attending the site visit if it is a requirement.

The Proponent should examine the site and surroundings and, before submitting a Proposal shall satisfy themselves as to the nature of the site, the quantities and nature of the work and equipment necessary for the completion of the work, the means of access to the site, the accommodation they may require, and in general, shall obtain all relevant information as to risks, contingencies and other circumstances which may influence their Proposal.

1.5 Mandatory Site Visit

A mandatory site visit will be held on Okanagan Lake prior to the commencement of the field survey. LLC will coordinate a combined field reconnaissance for the Proponent and relevant project team members.

The field reconnaissance component will allow the Proponent to review the lake and foreshore survey area, areas of cultural and archaeological significance, shoreline development pressures, habitat changes, and recent shoreline modifications and structures. The proposed budget should include one day of time and required travel to Okanagan Lake for this mandatory project component.

1.6 Proposal Closing Date, Time and Location

Proposals must be submitted by the Closing Date and Time to the Closing Location identified on the cover page of this Request for Proposal.

1.7 Proposal Submissions

A digital PDF format of the Proposal submission may be sent by e-mail to: **FIMP@livinglakescanada.ca**, with the email subject line **“Proposal – Okanagan Lake Inventory Using FIMP 2026”**

The LLC email server has about a 10mb file size limit. Proponents are to ensure that they have received a confirmation of receipt of email prior to the closing time. Larger submissions should be broken down into 2 or more emails or arrangements should be made ahead of time for file transfer via secure file transfer (e.g., Dropbox, SharePoint, OneDrive link).

Proponents wishing to send or deliver a Proposal submission in paper format to LLC should submit one printed copy in a SEALED envelope CLEARLY MARKED **“Proposal – Okanagan Lake Inventory Using FIMP 2026”**

1. The Proponent’s name and full mailing address should be clearly marked on the outside of the response envelope.
2. Faxed proposals will not be accepted.

1.8 Ownership of Proposals and Freedom of Information

All responses to this Request for Proposal become the property of LLC. By submitting a Proposal, the Proponent agrees LLC has the right to copy the Proposal Documents. Proposals will be held in confidence by LLC, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and any requirement for disclosure of all or a part of a Proposal under that Act. The requirement for confidentiality shall not apply to any Proposal that is incorporated into a Contract for the Work. Further, LLC may disclose all or part of any Proposal to the proposal review committee, at a public meeting of the Board, or when making a recommendation for the award of the Contract.

1.9 LLC Right to Accept or Reject Proposal

The lowest cost or any Proposal will not necessarily be accepted. LLC reserves the right in its absolute discretion to: accept the Proposal which it deems most advantageous and favourable in the interests of LLC; and waive informalities in, or reject any or all Proposals, in each case without giving any notice.

If only one compliant proposal is received by the closing date, LLC reserves the right to either accept the proposal or cancel the process without further consideration of the sole submission. This includes the right to cancel this Request for Proposal at any time before entering into a Contract with the Consultant. LLC reserves the right to cancel at any time before the award of the Contract without being obliged to any Proponent—not just where there is only one compliant Proposal.

Proposals that contain qualifying conditions or otherwise fail to conform to these Instructions to Proponents may be disqualified or rejected. LLC, however, may at its sole discretion reject or retain for consideration Proposals which are non-conforming because they do not contain the content or form required by these Instructions to Proponents or because they have not complied with the process for submission set out herein.

1.10 No Claim for Compensation

Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the Request for Proposal, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim. In no event will LLC be responsible for the costs of preparation or submission of a Proposal.

1.11 Conflict of Interest

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent has any financial or personal relationship or affiliation with any elected official or employee of LLC or their immediate families which might in any way be seen (in LLC sole and unfettered discretion) to create a conflict. If the proponent is uncertain as to whether a conflict of interest (or perceived conflict of interest) exists, then the proponent must disclose all reasonably relevant details so that LLC may make a determination. LLC may, at its sole discretion, reject or retain for consideration Proposals for which potential conflicts of interest are deemed to exist.

1.12 Anti-Collusion, Fraud & Corruption

The Proponent shall not communicate to any person prior to the opening of Proposals (other than to LLC through the delivery of a Proposal in the prescribed manner) the amount of any Proposal, or at any time adjust the amount of any Proposal by arrangement with any other persons, make any arrangement with any other person about whether or not he or that other person should or should not submit a Proposal or otherwise collude with any other person in any manner whatsoever in the Proposal process.

Any breach of this provision or non-compliance on the part of a Proponent shall, without affecting the Proponent's liability for such breach or non-compliance, result in the Proposal's disqualification.

1.13 Confidentiality

Confidential information about LLC or OKIB obtained by Proponents must not be disclosed unless authorized to do so, in writing, by LLC or OKIB. The Proponent agrees that his obligation of confidentiality will survive the termination of any Contract awarded under this Proposal process.

1.14 Irrevocability and Acceptance of Proposal

After the Closing Date and Time, all Proposals are irrevocable. By submission of a Proposal, the Proponent agrees that should its Proposal be successful the Proponent will enter into a Contract with LLC for the Work on the terms and conditions set out in the Proposal. Each Proposal will be irrevocable and open for acceptance by LLC for a period of ninety (90) calendar days from the day following the Proposal Closing Date and Time, even if the Proposal of another Proponent is accepted by LLC. By submission of a

clear and detailed written notice, the Proponent may amend or withdraw its Proposal PRIOR to the Closing Date and Time.

1.15 Irregularities and Informalities

LLC reserves the right, at its sole discretion to waive minor irregularities and informalities in any Proposal and to seek clarification or additional information on any area of any Proposal when it is in the best interest of LLC to do so.

1.16 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the specifications or other documents or having any doubts about the meaning or intent of any part thereof should immediately request, in writing, clarification from **Georgia Peck (FIMP@livinglakescanada.ca)**, who will send written instructions or explanations to all parties having a set of the Proposal Documents. Any work on a Proposal done by the Proponent after the discovery of discrepancies, errors or omissions, which the Proponent fails to seek clarification about, shall be done at the Proponent's risk.

1.17 Modification of Terms/Addenda

LLC reserves the right to modify the terms of this Request for Proposal at any time before the Closing Date and Time in its sole discretion. Written Addenda are the only means of amending or clarifying any of the information contained in the information package. LLC may amend or clarify the information package by issuing an Addendum. No employee or agent of LLC is authorized to amend or clarify the content of the information package or any Addenda except by issuing an Addendum. LLC makes no guarantee as to the timely delivery of any Addendum. Addenda issued prior to closing of this Invitation to Proposal shall become a part of the Proposal Documents.

1.18 Liability for Errors

While LLC has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by LLC, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve the Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

1.19 Basis of Contract Award

1.19.1 General

Proponents are hereby notified that LLC intends to review and enter into a Contract for the Work based not only on the Proposal price, but the other factors considered essential by LLC to provide a service for the Work being requested. Proposal evaluation may include, but is not limited to:

- Proponent's suggested approach to the work
- Professional qualification of managerial, technical, and in-field personnel

- Labour rates for key personnel
- Other associated costs to perform the Work
- Staff and corporate experience with projects similar to that being contemplated in the Work
- References provided by other clients of the Proponent
- Experience of the Proponent on past FIMP projects
- Confirmation of the proponent's ability to facilitate project completion in accordance with the schedule
- Availability of project team to complete the work in a timely manner
- Compliance with these terms of reference and completeness of the Proposal
- Total project cost
- Proponent's understanding of project requirements and expectations
- The overall value that the Proposal represents to the project, based on quality, service and price
- Any other value-added benefits offered by the Proponent which are not specifically addressed in this Request for Proposal

The evaluation process will be conducted solely at the discretion of the review committee. The review committee may decide to utilize other criteria in the review of Proposals other than those set forth above; in particular, the price to carry out the work will not be the only or primary criterion that will be utilized by the review committee. The review committee reserves the right to make inquiries regarding any or all Proposals and to verify all information submitted by Proponents. Proponents shall be competent and capable of performing the work. Proponents may be required to provide further evidence of previous experience and financial responsibility.

LLC reserves the right, at its discretion, to negotiate with any Proponent that LLC believes has the most advantageous Proposal or with any other Proponent or Proponents concurrently. In no event will LLC be required to offer any modified terms to any other Proponent prior to entering into a Contract with the successful Proponent, and LLC shall incur no liability to any other Proponent as a result of such negotiations or modifications.

Proponents are advised that, after receipt of Proposals and prior to award of Contract, Proponents may be required to provide LLC with additional information concerning the Proponent or their Proposal including, but not limited to, a further breakdown of relevant components of the proposed prices.

LLC reserves the right to reject any Proposals of a company that is, or whose principals are, at the time of submitting a Proposal, engaged in a lawsuit against LLC in relation to work similar to that being proposed.

LLC reserves the right to reject any Proposals of a company that owes, or whose principals owe, monies to LLC at the time of submitting a Proposal.

1.19.2 Project Specific

Each compliant proposal will be evaluated based on the criteria and weighting outlined in Table 2.

Table 2. Project Scoring Criteria and Weighting

Num.	Criteria	Description	Weight
1	Value	Evaluates the overall cost, accuracy, and breakdown of the proposed budget. (30%)	30%
2	Technical	Evaluates the quality of the written proposal. Evaluates the technical expertise and past experience of the Project Team. Evaluates the reputation and past performance record of the Project Team. (30%)	30%
3	Collaboration	Assesses the Project Team’s demonstrated experience working in partnership with First Nations governments. Evaluates how Indigenous Knowledge systems are meaningfully integrated into the proposal. (30%)	30%
4	Socio-Economic	Evaluates the overall socio-economic benefit provided to the local economy and participation of the local community. (7.5%)	10%
5	Health, Safety, and Environment	Evaluates the apparent commitment to Health, Safety, and the Environment of the Proponent. (2.5%)	
TOTAL:			100%

1.20 Definition of Contract

This Request for Proposal should not be construed as an Agreement or Contract to purchase goods or services. LLC is not bound to enter into a Contract with the Proponent who submits the lowest priced Proposal or with any Proponent. LLC will be under no obligation to receive further information, whether written or oral, from a Proponent after the Proposal Closing Date and Time.

Neither the acceptance of a Proposal nor the execution of a Contract will constitute approval of any activity or development contemplated in any Proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or bylaw.

Notice in writing to a Proponent that it has been identified as the Consultant and the subsequent full execution of a written Agreement will constitute a Contract for the performance of the Work and no Proponent will acquire any legal or equitable rights or privileges relative to the Work until the occurrence of both such events.

1.21 Form of Contract

By submission of a Proposal, the Proponent agrees that should it be identified as the successful Proponent, it is willing to enter into a Consulting Services Agreement with LLC within fifteen (15) days of the date of the Notice of Award. A copy of LLC's Consulting Services Agreement is attached in Appendix A.

By submission of a Proposal, the Proponent agrees that, should it be identified as the Consultant, it is willing to provide to LLC the necessary Insurance Policies and WorkSafe BC Clearance Letter (as is appropriate) within fifteen (15) days of the date of the Notice of Award.

2 PART 2 – SPECIFICATIONS

2.1 Introduction

The [Foreshore Integrated Management Planning methodology \(2021\)](#) has been updated and field-tested by Living Lakes Canada through a four-year Contribution Agreement with Fisheries and Oceans Canada (DFO), with funding provided through the *Canada Nature Fund for Aquatic Species at Risk Program*. FIMP (2021) has been applied to sixteen lakes since 2020. Through a partnership with Okanagan Indian Band and Westbank First Nation, Okanagan Lake has been identified as a high-priority re-FIMP, where local decision makers and rightsholders will benefit from a repeat assessment to determine the rate of foreshore change.

The [Local Indigenous Knowledge and Values Framework](#) will help guide this project as cultural assessments (led by the respective First Nations) will take place in tandem with ecological assessments. This framework has been previously applied to Nicola Lake, Douglas Lake, Wood Lake, and Kalamalka Lake. The Local Indigenous Knowledge and Values Framework is a guidance document co-developed between Upper Nicola Band and Living Lakes in 2022 with the intent to direct respectful and consistent inclusion of Indigenous Knowledge and values into the FIMP process. By providing culturally appropriate directions throughout the project timeline, project team members, advisors, and hired consultants will be guided when developing and maintaining meaningful relationships and connections with Indigenous partners. This tool does not introduce new regulations or alter existing regulations but integrates cultural understanding and awareness of shoreline values in the FIMP project process.

The Okanagan Indian Band and Westbank First Nation support the use of this framework by the FIMP project team to facilitate inclusivity, thoughtfulness, and balance throughout the project, for the ultimate purpose of creating opportunities for both worldviews to work in tandem throughout the Foreshore Integrated Management Planning project process. The information generated from these efforts will diversify FIMP project processes and provide Okanagan communities with documented foreshore characteristics to identify sensitive and high-quality habitat, areas with Indigenous cultural and archaeological value (cultural overview assessments to take place separately from outlined works in this Request for Proposal), high impact/developed zones, and areas demonstrating environmental degradation. The information will be shared with government, Indigenous communities, consultants, developers, and other stakeholders to support evidence-based, land-use decision making.

OKIB and WFN will co-lead this project alongside LLC and will partake in FIM field work, sharing capacity with hired consultants. Experienced staff members and technicians formally trained in the FIMP methodology will apply their skills throughout the project by providing and driving the field boat, collecting drone footage, and providing up to two technicians to join the field crew. These costs have been previously accounted for in the project budget and do not need to be represented within proposal

budgets. Proponents should take this additional capacity into consideration while developing a project budget and scope of work. Details on this shared approach can be found below.

This Project relies heavily on a suite of biological methods referred to as the “Foreshore Integrated Management Planning (FIMP)” methodology. The FIMP methodology is explained in detail in Schleppe et al. (2021) and has three main components:

- 1) **Foreshore Inventory and Mapping (FIM)** is a biological methodology developed by consulting biologists in partnership with DFO. The FIM methodology was derived by adapting an existing stream mapping protocol, called Sensitive Habitat Inventory and Mapping (SHIM), for use on lakes. As the name implies, FIM is used to delineate, inventory, and map lake foreshore habitats.
 - a. OKIB will be responsible for vessel operation throughout the field survey and inventory and any required field reconnaissance.
 - b. OKIB will be responsible for video documentation via drone use.
 - c. Two OKIB technicians will be available to assist with data collection during the field survey and inventory.
- 2) **Foreshore Habitat Sensitivity Index (FHSI)** is a quantitative analysis that relies on simple math to help account for, and then reduce multiple biological variables into an intuitive, easy to interpret index. The index consists of five Ecological Ranks (e.g., Very Low, Low, Medium, High, and Very High) that describe the existing habitat value and sensitivity to urban development activities.
- 3) **Foreshore Development Guidelines (FDG)** is a report that summarizes the technical analysis (i.e., the FHSI) and recommends management guidelines to help protect high-value and sensitive habitats located along the lake foreshore.
 - a. FDG and FIM report reviews will be coordinated by LLC and will involve OKIB, WFN, and the project steering committee which includes representatives from provincial and local government, First Nations, and local stewardship groups.

Living Lakes Canada invites proposals from qualified consulting firms to survey and report on the selected lakes using the FIMP methodology.

2.2 Background

2.2.1 Living Lakes Canada

Living Lakes Canada (LLC) is affiliated with Living Lakes International, a global network of over 130 non-government organizations that share the mission to enhance the protection, restoration and rehabilitation of lakes, rivers, wetlands and watersheds throughout the world. Living Lakes Canada is a registered BC Society and charitable organization.

Living Lakes Canada’s science-driven, community-based water monitoring, assessment and restoration programs bridge the gap between science and action to foster freshwater stewardship. Living Lakes Canada’s mandate is to increase public knowledge of watershed health and empower Indigenous and non-Indigenous communities across Canada to protect their threatened freshwater sources.

Global Nature Fund, the Lake Winnipeg Foundation, and Wildsight established Living Lakes Canada in 2010 to unite water stewardship groups throughout the country. These three organizations share the common goal of conserving ecosystems for humans and nature, and strive for the protection of lakes, streams, wetlands, and watersheds.

2.2.2 Okanagan Indian Band

The Okanagan Indian Band is part of the Okanagan Nation, and is located at the head of Okanagan Lake in Vernon, BC. Our seven reserves total 11,282 hectares. There are currently about 2,030 Okanagan Indian Band members. Approximately half of our members reside on reserve while the other half reside off reserve. The majority of members living on reserve reside at IR#1 at Vernon. The Okanagan Indian Band offers a variety of services and facilities including health care, social services, and early childhood education to name a few.

2.2.3 Westbank First Nation

Westbank First Nation (WFN) is one of eight Okanagan Nation communities. Certain areas of WFN Lands are traditionally known as *stqaʔtkwʔniwt* which interprets to windy bay. WFN people are *syilx*, speaks *nqilxʷcn*, and oversees approximately 69,000km² of traditional territory. WFN has over 900 Members, of which approximately 60% live on reserve. Balancing growth and development with cultural identity is at the forefront of WFN's policies, principles, and procedures. WFN works closely with the Okanagan Nation and neighbouring communities to ensure a shared responsibility to the water, land, animals, and all living things is upheld.

2.2.4 FIMP Project

Request for Proposal

Living Lakes Canada invites proposals from qualified consulting firms to re-FIMP survey and report on the following lake(s) using the FIMP methodology (Schleppe et al. 2021):

Okanagan Lake (approximate latitude and longitude: 49.8339° N, 119.5236° W)

2.3 Scope of Work

This Request for Proposal (RFP) pertains to Year 1 of a planned two-year project to conduct a Foreshore Integrated Management Planning (FIMP) re-survey of Okanagan Lake. The full project is anticipated to cover approximately 290 km of shoreline. At this time, funding has been secured for Year 1 only, and proponents are requested to submit proposals for Year 1 services only.

Year 1 will include the survey and assessment of approximately 200 km of shoreline, encompassing the northern and central portions of Okanagan Lake, extending south to the southern boundary of Westbank First Nation territory, located between the communities of Peachland and Summerland (see Appendix B for attached map).

Subject to the confirmation of additional funding, Year 2 of the project may proceed and will involve the survey and assessment of the remaining approximately 90 km of shoreline. In such circumstances, Living Lakes Canada intends to engage the successful proponent from this RFP to complete Year 2 under a subsequent agreement, subject to satisfactory performance and mutually agreeable terms.

2.3.1 Instructions to Proponents

Proponents shall review, understand, and incorporate the Key Resources listed in Table 3 into their proposal (and subsequent deliverables).

Where the lake to be surveyed is considered a “re-FIMP” (i.e., the lake has previously been assessed using the FIMP/SHIM/FIM framework once and the next survey would constitute a re-assessment), Proponents must review, understand, and appropriately consider and incorporate all previously completed FIMP-related reports, projects, and publications. Completing this task is considered essential to the quality and credibility of any re-FIMP project.

2.3.2 Key Resources

Proponents are expected to review, understand, and incorporate the resources listed in Table 1 into their proposals. Table 1 is provided as a starting point and does not represent a comprehensive list of relevant materials. Proponents are encouraged to supplement these resources with additional research, including relevant international riparian and foreshore assessment tools, to strengthen the discussion and supporting references within their submissions.

Table 3. Key Resources

Resource Reference	Rationale	Available at:
Schleppe, J., L., Porto., and S. McPherson. 2021. Foreshore Integrated Management Planning Methods. Prepared for Living Lakes Canada. Nelson, British Columbia.	This document provides the most up-to-date and comprehensive explanation of the FIMP methodology. It describes in detail the methodology, equipment, data management, and reporting structure likely required to scope a competitive proposal.	Columbia Basin Water Hub- FIMP Landing Page: https://data.cbwaterhub.ca/dataset/foreshore-integrated-management-planning-framework/resource/16254d71-0f9e-4ac3-8fc6-cc9d5cea0579
Schleppe, J.1, F. C. Yanez, and L.Crevier. 2021. Foreshore Integrated Management Planning. Database Management. Prepared for Living Lakes Canada. Prepared by: Ecoscape Environmental Consultants Ltd.	This document details FIMP database management methods. The key objective of a template for data management for FIM datasets is to ensure better conformance and data standards for use of data in long-term monitoring of lakeshore conditions.	Columbia Basin Water Hub- FIMP Landing Page: https://data.cbwaterhub.ca/dataset/foreshore-integrated-management-planning-framework/resource/ef013bc9-f79f-4ddd-8c0e-8d5748c060e4
Schleppe, J. and B. Mason. 2009. Standard Methods for Completion of Foreshore Inventory and Mapping Projects. Prepared by: Ecoscape Environmental Consultants Ltd. and The Community Mapping Network.	This document was, until 2019, the most up-to-date explanation of the methodology and may contain alternative, yet useful explanations for some activities.	LLC website: https://livinglakescanada.ca/wp-content/uploads/2020/05/FIMP_Methods_2009.pdf
FIM and FDG (Previously Shoreline Management Guidelines) reports from the previous Okanagan Lake survey in 2009 and 2016.	The link takes you to the FIMP landing page on the Columbia Basin Water Hub, for quick access to previous Okanagan Lake FIM reports.	Columbia Basin Water Hub- FIMP Landing Page: https://data.cbwaterhub.ca/dataset/okanagan-lake-foreshore-inventory-and-mapping-and-aquatic-habitat-index-2016
FIMP reports for several other recently surveyed lakes. Previously re-surveyed lakes include Douglas Lake 2024, Fraser Lake 2023, Nicola Lake 2023, Slocan Lake 2022, Columbia Lake 2022.	The links provide quick access to a number of completed reports for previously surveyed lakes.	Columbia Basin Water Hub- FIMP Landing Page: https://data.cbwaterhub.ca/organization/foreshore-integrated-management-planning

<p>Federal, provincial, and municipal sources and inventories such as fish and wildlife inventories.</p>	<p>This information should be used to support various components of the FIMP methods (as explained in Schleppe et al. 2021).</p>	<p>Review Section 2.2 of Schleppe et al. (2021) for examples of relevant federal, provincial, or municipal information sources (e.g., <i>Aerial Imagery, Aerial Imagery, Cadastral, Regional Boundaries, Provincial & Conservational Boundaries, Fisheries & Wildlife data</i>).</p> <p>Okanagan Large Lakes Foreshore Protocol: https://www2.gov.bc.ca/gov/content/environment/natural-resources-stewardship/laws-policies-standards-guidance/best-management-practices/okanagan-large-lakes-foreshore-protocol</p>
<p>First Nations community locations and Traditional Use areas.</p>	<p>This information should be used to support various components of the FIMP methods (as explained in Schleppe et al. 2021).</p>	<p>Province of BC: https://www2.gov.bc.ca/gov/content/environment/natural-resources-stewardship/consulting-with-first-nations/first-nations-negotiations/first-nations-a-z-listing</p>
<p>G. Peck, B. Holmes, C. Armstrong, 2023. Local Indigenous Knowledge and Values Framework. Prepared by: Living Lakes Canada, Upper Nicola Band.</p>	<p>The Local Indigenous Knowledge and Values Framework was developed with the intent to direct respectful and consistent inclusion of Indigenous Knowledge and values into the Foreshore Integrated Management Planning project in the Syilx Okanagan region.</p>	<p>LLC website: https://livinglakescanada.ca/wp-content/uploads/2023/04/indigenous-knowledge-and-values-framework-april-2023.pdf</p>

2.3.3 Objectives

Year 1 Objectives

The objectives for Year 1 are to:

- 1) Complete all components of the Foreshore Inventory Mapping (FIM) survey within the Year 1 study area, in collaboration with project co-leads, in accordance with the methodology outlined in *Schleppe et al. (2021)*.

- Conduct proofing and quality assurance/quality control (QA/QC) for all Foreshore Inventory Mapping (FIM) data.
 - Undertake a rate-of-change analysis by jurisdiction using available historical and current FIM data.
 - Prepare a results-oriented memorandum summarizing Year 1 findings for decision-makers and Rights-holders to inform planning ahead of Year 2.
 - Provide a draft FIM database as an interim deliverable in advance of finalized project products anticipated in 2027.
 - Communicate with OKIB and WFN regarding cultural assessment processes. Cultural assessments will be completed by OKIB and WFN and summarized in a report memorandum; proponent involvement is expected to be minimal.
 - Communicate with OKIB as drone imagery for the central and northern portions of Okanagan Lake is collected.
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Year 2 Objectives (Subject to Funding)

Subject to confirmation of funding, the objectives for Year 2 are to:

- Complete the Foreshore Inventory Mapping (FIM) survey for the remaining Year 2 study area, in collaboration with project co-leads, in accordance with *Schleppe et al. (2021)*.
- Conduct proofing and QA/QC for all Year 2 Foreshore Inventory Mapping (FIM) data.
- Complete a rate-of-change analysis by jurisdiction using the full project dataset.
- Complete all components of the Foreshore Habitat Sensitivity Index (FHSI) analysis using combined Year 1 and Year 2 data, in collaboration with project co-leads and in accordance with *Schleppe et al. (2021)*.
- Prepare an integrated Foreshore Development Guidelines report using data collected in Years 1 and 2, informed by guidance from project co-leads, and the Local Indigenous Knowledge and Values Framework.
- Support the editing and packaging of drone imagery collected across the full Okanagan Lake foreshore (2026–2027).

2.3.4 Deliverables

Year 1 deliverables must include four individual products, along with all supporting GIS files, databases, and metadata. Details are outlined below.

1. Year 1 Results Memorandum
 - a) A results-oriented memorandum summarizing Year 1 findings for decision-makers and Rights-holders to inform planning ahead of Year 2. The memorandum should closely align with the structure and content of a FIM technical report, as outlined in *Schleppe et al. (2021)*, including:
 - i) Field data collection and entry into the electronic database
 - ii) Database formatting and quality assurance/quality control (QA/QC)
 - iii) Required analyses and summary of findings
 2. QA/QC analysis must include updates to original datasets and removal of any failed data points in accordance with *Schleppe et al. (2021)*.
 3. Rate-of-Change Analysis
 - a) A complete rate-of-change analysis for the Year 1 study area, conducted by jurisdiction using available historical and current FIM datasets.
 4. Draft FIM Database
 - a) A draft Foreshore Inventory Mapping (FIM) database provided as an interim deliverable in advance of finalized project products anticipated in 2027. This deliverable must include:
 - i) All supporting GIS files
 - ii) Associated databases
 - iii) Complete metadata documentation
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Subject to confirmation of funding, Year 2 deliverables must include four individual products integrating both Year 1 and Year 2 data, along with all supporting GIS files, databases, and metadata.

1. Integrated FIM/FHSI Technical Report
 - a. A complete FIM/FHSI technical report, prepared in accordance with *Schleppe et al. (2021)*, including:
 - i. Field data collection and entry into the electronic database,
 - ii. Database formatting and QA/QC procedures
 - iii. Analytical outputs and interpretations
 - iv. Final report preparation
2. QA/QC analysis must include updates to original datasets and removal of any failed data points in accordance with *Schleppe et al. (2021)*.
3. Foreshore Development Guidelines (FDG) Report
 - a. A standalone Foreshore Development Guidelines (FDG) report suitable for distribution to decision-makers and the public. The report must follow the structure outlined in *Schleppe et al. (2021)* and include all recommended sections and supporting materials, such as; Figures, Tables, Maps, GIS-related files and spatial outputs
4. Final Project Data Package
 - a. A complete package of all supporting GIS files, databases, and metadata associated with the integrated Year 1 and Year 2 datasets.

2.4 Schedule

The Project Schedule is provided in Table 1 (Section 1.1).

Proponents are encouraged to include a proposed project schedule in their submissions. The schedule should demonstrate a well-organized and realistic timeline for completing the proposed work. Providing this information will assist the review committee in evaluating the feasibility of the proposed approach and may inform proposal scoring. Additional details on proposal evaluation are provided in Section 1.19.2.

Proponents should ensure that the proposed field survey schedule aligns with the considerations and processes outlined in *Schleppe et al. (2021)* (see Key Resources in Table 3).

Living Lakes Canada strongly encourages proponents to conduct the required field surveys in August 2026, ideally near the timing of the previous survey conducted September 12–23, 2016, while avoiding periods past peak lake use that typically occur after September 1.

For reference, the 2016 survey completed 314 shoreline segments in 11 days, with four to five field crew members deployed daily.

2.5 Cost

The applicant should clearly present all anticipated costs to complete the scope of work. Costs should be sufficiently explained so that the proposal review committee can assess the amount of time, effort, and cost associated with each component (e.g., lake), phase or deliverable of the Project (e.g., FIM, Results Memorandum, Rate of change analysis). This information may assist the review committee with scoring proposals. Additional proposal scoring details are provided in Section 1.19.2. If interested, additional details about the expected budget can be requested directly from **Georgia Peck** (FIMP@livinglakescanada.ca).

3 PART 3 – PROPOSAL SUBMISSION

3.1 Proposal Format

The Proposal should clearly convey the Proponent's intent in a clear and concise manner. The Proposal should contain a covering letter, Table of Contents, and a short executive summary of the key features of the proposal. All pages should be consecutively numbered.

3.2 Proposal Content

3.2.1 The Firm

- b. Firm Experience/Past Performance - The firm's past project experience with the FIMP methodology or similar projects (such as lake foreshore inventory, assessment, classification, or mapping experience).

- c. Project Team - The qualifications and experience of the personnel the Proponent intends to use for the Work. This must include any subcontractors proposed to be used in the Work.
- d. Resources - The qualifications and experience of the Proponent's reserve personnel backing up the Project Team and the quality and quantity of resources available to the firm such as technical aids, IT resources, equipment etc.

3.2.2 The Proposal

2.1 Methodology/Task Evaluation - The Proponent's approach to the services required as set out in Part 2 Specifications. Consideration is given to whether the Proponent has effectively addressed each aspect of the Request for Proposal, thoroughly understood the requirements of the Request for Proposal (e.g., FIM, FHSI, FDG), and identified problem areas. The Proponent is expected to adhere as closely as possible to the project components and methods outlined in Part 2; however, Proponents may suggest alternative approaches or propose modifications that they deem improvements over the existing methodology.

3.1 Scheduling/Work Plan - The completeness of the task items and rationale of the work plan which shows a clear indication of the anticipated work schedule along with any other supporting documents pertinent to the Project. LLC requests that proponents agree to meet or better the Project Schedule (Table 1) for submitting deliverables. However, Proponents are encouraged to expand on the Project Schedule (Table 1) as they see fit.

4.1 Detailed Cost Breakdown – the Proponent should provide a detailed cost breakdown of all work tasks which includes details of the team members assigned to those tasks, hours budgeted for each team member and hourly rates for each team member. The Proposal should also include details of Proponent's preferred arrangements for mileage, per diem and other disbursements.

3.3 Proposal Evaluation Criteria

Please see Section 1.19.2 for Project-specific evaluation criteria.

Proponents are encouraged to review and incorporate any aspect or information from this Request for Proposal in their proposal.

4 APPENDIX A - Consulting Services Agreement

5 APPENDIX B - Year 1 Study Area

