

TRAINING FOR LONG-TERM SUSTAINABILITY PLANNING AMONG SMALL WATER SYSTEMS IN BC

Terms of Reference – Consulting Services

July 2, 2017

1. Background

The BC Water & Waste Association (BCWWA) is a not-for-profit organization that represents over 4,000 water professionals. Our members are responsible for ensuring safe, sustainable and secure water, sewer and stormwater systems in BC and the Yukon. They work every day to keep our water systems clean and safe – from source to tap to drain, and back to the environment. They include water and wastewater facility operators, utility managers, engineers, technicians and technologists, consultants, government policy and regulatory staff, researchers, suppliers, backflow assembly testers, and cross-connection control specialists. The BCWWA delivers professional development, certification and advocacy programs and services to ensure that our water systems continue to protect public health and the environment.

In 2015, the BC Ministry of Health approached the BCWWA with funding to develop a pilot project to build the financial and managerial capacity of small water system owners and operators so that they make informed decisions and, ultimately, health risks to small water system users are reduced.

The outcomes of this pilot included the development of a guide and term sheet to help communities determine if point-of-entry/point-of-use treatment devices meet their needs and to facilitate legal agreements between owners and users; and delivery of capacity building workshops, networking sessions and webinars to 99 small water systems that deliver water to approximately 20,000 residents in BC. Nine of these systems also received one-on-one coaching to support implementation of an action plan to improve their systems.

The data collected from the 99 systems that participated in the pilot project indicates less than half have centralized treatment in place that meets BC's drinking water standards. Despite this low level of compliance, the majority of participants self-assessed their treatment infrastructure as "fair". This discrepancy highlights the need to continue engaging with and educating small water systems owners and operators about their responsibilities and risks.

In 2017, additional funding was provided by the BC Ministry of Health to continue helping small water systems move beyond addressing their immediate operational needs, and begin long-term sustainability planning.

The BCWWA is seeking the services of a qualified Consultant to develop and deliver training and coaching support to trustees and directors of governance bodies responsible for small water systems i.e. strata councils, water user communities, improvement districts, good neighbour systems etc. The objective is to increase awareness about the legal responsibilities, risks and financial best practices among all members of a small water system's governance body so that informed decisions are made about the long-term management and sustainability of their system.

2. Situation Analysis

There is concern among government policy makers and water sector professionals that many of BC's small water systems may pose risks to public health due to lack of capacity to effectively manage operations and finances, lack of financial resources to invest in needed infrastructure, and challenges related to stewardship and governance. Furthermore, many of these issues have become chronic, resulting in complacency and resistance to change on the part of some small systems owners and users.

There are approximately 4,500 water systems in British Columbia; the vast majority of these systems (~90%) are considered to be "small water systems", which are defined to have two or more connections and serve a population of up to 500 people. Small water systems are estimated to serve about 500,000 people, or ~15% of BC's total population, mostly in non-urban areas.

In recent years, there have been a number of reports that have reviewed the state of small systems in BC, including *Fit to Drink* (2008) by the BC Ombudsman; *Recommendations for Addressing Key Small Water System Challenges* (2013) by the UBCM Small Systems Working Group; *Small Water Systems Regulatory Review* (2014) by the BC Ministry of Health, and *Are Our Water Systems at Risk?* (2015) by the BC Water & Waste Association.

These reports point to the need to build capacity among small water system owners so that they make informed decisions that advance financial sustainability, operational resilience, and safety. They also highlight the need to build understanding and support among small water system users so that they understand the relationship between rates, level of service, and risks to public health.

3. Scope of Work

The selected Consultant will work with the BCWWA to provide the following scope of services:

1. **Develop training and support materials** for all members of a small water system's governance body (e.g. strata council, water user community, improvement district board of trustees, etc.) so that informed decisions are made about the long-term management and sustainability of their system. One of the limitations of the "Taking Care of Your Water System" workshops delivered in 2016-2017 was that only one or two owners from a system participated. It can be challenging for a single individual to influence change, particularly when a culture of complacency and resistance to change exists within the community.

Group training will address the following key topics:

- Cost of getting it wrong
- Components of a water system – how it works
- Regulatory and legal responsibilities of water system owners
- Specific legislation that applies to each type of governance body (i.e. *BC Societies Act* vs *Strata Property Act*) and good governance practices
- Common areas of risk in a water system (i.e. liability)
- Importance of training and certification of operators
- Long-term financial planning and financial best practices
- Annual schedule of water system management responsibilities

The Consultant will also develop a self-assessment tool to be completed by workshop participants that gauges their current level of knowledge of their water system and the efficacy of their governance practices in supporting informed decisions and long-term sustainability planning. The self-assessment tool should build on and complement the capacity self-assessment tool (see attached) developed for the ‘Taking Care of Our Small Water Systems’ workshop from the first phase of this project. The results of these tools will be utilized by participants in the development of an action plan and as a component of their application for coaching.

2. **Deliver the ‘Long-Term Sustainability Planning’ training** to 10 - 20 systems with at least two systems in each of the 5 sessions (or cohorts). The delivery of this training may be in-person, online or a combination as the small water systems who apply, may not all be in close physical proximity to enable face-to-face delivery. Feedback from each session will be collected, reviewed and incorporated to improve delivery of each subsequent session.

In-person training may be possible in regions where there are BCWWA has a list of small water systems that participated in the first phase of the project, including Abbotsford, Courtenay, Duncan, Kamloops, Kelowna, Nelson, Powell River, Smithers or Victoria.

3. **Deliver coaching support** to 5 selected water systems on implementing good governance and long-term management and sustainability practices. Communities will apply for coaching using their self-assessment results and action plan, completed as a part of the ‘Long-Term Sustainability Planning’ workshop. They must also demonstrate an interest in continuous improvement and a willingness to develop plans and take action towards long-term sustainability planning for their systems.

4. Out of Scope

To support the work of the Consultant, the **BCWWA will be responsible for:**

- Workshop logistics, including organizing the venue and providing printed materials.
- Program marketing, including contacting small system owners to encourage their participation in the workshops and coaching.

5. Deliverables

The deliverables for the project include:

- Training facilitation guide and PowerPoint presentation
- Support materials for training including a self-assessment tool, template for developing an action plan and template for coaching application
- Delivery of 5 training sessions (on-line, in-person, or combination)
- Coaching for 5 small system owners to support implementation of changes

6. Expected Project Milestones

Milestone	Timeline
Proposals due	August 1
Review proposals and select Consultant	August 7
Project kick-off meeting	By August 15
Develop 'Long-Term Sustainability Planning' workshop and materials	By September 15
Pilot the workshop	By October 15
Adjust workshop and materials based on pilot feedback	By October 31
Deliver 'Long-Term...' workshops in up to four communities	Nov 2017 to Mar 2017
1-1 coaching support for up to 5 system owners	Nov 2017 to Mar 2018

7. Budget

The total maximum budget (including expenses) for this project is \$47,500 plus applicable taxes, comprised of:

Scope item	Maximum budget
Item 1: Long-Term Sustainability workshop and material development	\$25,000
Item 2: Workshop delivery – 5 workshops @ \$2,500 each (including travel, if required)	\$12,500
Item 3: One-on-one coaching – 5 communities @ \$2,000 each (including travel, if required)	\$10,000
TOTAL	\$47,500

8. Project Team

The project will be managed by Ashifa Dhanani, Small Water Systems Project Manager, with guidance provided by Carlie Hucul, BCWWA CEO, and Ministry of Health project representatives.

9. Proposals

9.1. Contents

The proposals should include:

- a description of the anticipated approach to carrying out the work, and the expected products;
- a description of the project team, including details about the role of each team member;
- the proposed outline and topics for the training and an outline of the self-assessment tool;
- a budget that outlines project tasks, expected time commitment, and hourly charge out rates;
- a schedule of project milestones and deliverables;
- an outline of requirements from the BCWWA; and
- three references, including names and contact details.

Proposals should not exceed 12 pages in length.

9.2. Deadline

The deadline for proposal submissions is **Tuesday August 1, 6:00 pm**. Proposals received after this time will not be considered.

9.3. Submission Method

Please submit proposals in electronic format to adhanani@bcwwa.org on or before the proposal deadline, with “Long Term Sustainability Planning - Project Proposal” in the subject line. An email confirmation will be sent to acknowledge receipt of the proposal.

9.4. Evaluation Criteria

Please note that selection of the Consultant will be based upon ability to meet the objectives of the project; the lowest priced proposal will not necessarily be chosen. Proposals will be evaluated on the following criteria:

- Demonstrated experience of the team in successfully delivering projects of a similar nature.
- Demonstrated experience and knowledge of legislation impacting small water systems in BC, good governance practices for the various types of small water entities, and components of long-term sustainability planning.
- Methodology/approach.
- Value for money.

9.5. Other

The BCWWA is not responsible for any costs associated with proponents’ preparation of proposals.

10. Questions

Questions about this project can be directed to Ashifa Dhanani, Small Water Systems Project Manager for the BC Water & Waste Association, at adhanani@bcwwa.org or 604-880-8585.