



WHISTLER HOUSING AUTHORITY

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[WHISTLERHOUSING.CA](http://WHISTLERHOUSING.CA)

# INVITATION FOR EXPRESSION OF INTEREST:

## ONLINE HOUSING INVENTORY MANAGEMENT PLATFORM

The Whistler Housing Authority (WHA) invites individuals and/or firms with suitable experience to submit an Expression of Interest (EOI) to develop and implement an Online Housing Inventory Management Platform for the Whistler Housing Authority.

Issued:	September 20, 2023
Deadline for Question Submission:	October 11, 2023 by 4:00 p.m. PST
Closing:	October 23, 2023 by 4:00 p.m. PST
Contacts:	Allison Winkle – Housing Administrator <a href="mailto:allison@whistlerhousing.ca">allison@whistlerhousing.ca</a> 604-905-4688 ext. 3

## INTRODUCTION

Whistler Housing Authority (WHA) invites Expressions of Interest from qualified firms or individuals for the development and implementation of an Online Housing Inventory Management Platform for the WHA. The platform will cater to WHA Homeownership Properties under the Whistler Employee Housing Program. The primary objective is to establish an efficient and comprehensive inventory management system that facilitates information accessibility, both internally and externally, with a specific focus on the restricted Ownership Housing Program.

## BACKGROUND

Established in 1997, Whistler Housing Authority (WHA) is an independent municipally owned corporation of the Resort Municipality of Whistler created to oversee the development, administration, and management of employee restricted housing in Whistler.

WHA works to support and meet the needs and interests of the community through delivery of the following core services:

- Long-term affordable Rental and Ownership Housing for Whistler's workforce
- Portfolio Management of WHA-owned Rental inventory
- Employee Housing Resource Centre for the community

WHA oversees over 2,000 units of restricted Employee Housing across several different housing types and tenures. The two main components of the Employee Housing Program are the employee restricted ownership and rental inventory managed by the WHA. Demand for Whistler's Employee Housing Program remains strong, and waitlists are used to access Employee Housing for the community's workforce.

Whistler's Employee Housing Program is regulated by a myriad of Housing Agreements and Employee Housing Policies. These complex and diverse frameworks have evolved over the past 25 years with the growth and sophistication of Whistler's Employee Housing Program. Most of the information is property-specific and frequently needs to be accessible internally (by staff) and externally (primarily by program participants and occasionally by the general public) in a user-friendly, efficient and secure capacity. The continual growth of the Employee Housing inventory and the entrenched support from the resort community have resulted in ongoing inquiries for information.

## PURPOSE

The purpose of this project is to achieve operational excellence and increase client engagement through digital transformation. Everyone is best served when information is readily available to staff, program participants, and the public. The desired outcome is to optimize staff time, deliver services with consistency, and build trust in the integrity of WHA's Employee Housing Program through a digital platform.

## KEY OBJECTIVES

The Online Housing Inventory Management Platform should encompass the following key objectives, in a phased approach:

- Phase I: Creating a centralized database for internal access & use.
- Phase II: Creating an external information sharing platform.
- Phase III: Integrating an intake portal for property use.

Following any initial needs assessment and planning work, the successful applicant will execute Phase I with development and implementation of an Online Housing Inventory Management Platform, and then ideally be able to be considered for Phases II & III of the project.

#### Phase I: Creating a centralized database for internal access & use.

1. **Assessment:** Assessment of current state, requirements for usable data from the WHA, and generate process/workflows based on new process.
2. **Centralize WHA's Homeownership Inventory information:** Create an online centralized system to store and manage property-related information, including property details, resale and rent formulas, ownership contact details, occupancy data, notes, and covenants registered on title. This storage location should be situated in Canada.
3. **Automation:** Automate the Maximum Resale and Rental formula calculations for each property in the price-restricted Homeownership inventory.
4. **Improved Reporting and Analytics:** Generate exportable reports and analytics to provide better insights, KPI tracking, and data on the housing inventory, as dashboards and exportable data.
5. **Real-time Inventory Tracking:** Implement real-time tracking of housing units, including ownership duration, occupancy status, and other relevant data.
6. **Training and Change Management:** Training documentation, performance governance, change management.

#### Phase II: Creating an external information sharing platform.

1. **Document Storage & Management:** Establish a central and secure location for storing property files (e.g., PDF documents of covenants, floor plans, contracts, occupancy certificates, etc.) and records of communication with owners, including supporting documentation. This storage location should be situated in Canada.
2. **Data Accessibility for the Public:** Provide an online externally accessible cloud-based portal for the public to search and access limited property information, such as specific property restriction details.
3. **Data Accessibility for Owners:** Enable self-service to owner-specific property information, either upon request or through an online portal.
4. **Enforcement:** Provide flagging and tracking capabilities to assist staff with timely resolution of property related issues.
5. **System Integration:** Integrate the platform with existing WHA software and systems, as well as the current [WHA website \(www.whistlerhousing.ca\)](http://www.whistlerhousing.ca) hosted on Shopify.

### Phase III: Integrating an intake portal for property use.

1. **Declaration Intake:** Enable intake and status reporting for annual property Occupancy Declarations, or integrate with an intake form with smart reporting capabilities.
2. **Expanded Reporting and Analytics:** Generate exportable reports and analytics to provide better insights and data on the housing inventory collected from the Occupancy Declarations, as dashboards and exportable data.
3. **Expanded Real-Time Inventory Tracking:** Implement real-time tracking of Occupancy Declarations submitted, including contact details, occupancy status, rental rates, and other relevant data.

### KEY FEATURES AND FUNCTIONALITY

The Online Housing Inventory Management Platform should incorporate the following key features and functionality:

1. **User Interface:** Develop an intuitive and user-friendly interface for easy navigation and efficient data entry, catering to both internal staff and external owners/public, tailored to the unique needs of the Whistler Housing Authority.
2. **User Management:** Implement user authentication and role-based access control for administrators, and potentially for individual owners. Ensure secure user registration, login, and authentication mechanisms for property owners and service providers.
3. **Housing Inventory Management:** Enable the addition, editing, and deletion of housing unit information, including property details, current covenants registered on title, resale prices (monthly formula), rental prices (annual formula), and any approved property improvements.
4. **Scalable and Customization:** Develop a flexible and scalable platform that accommodates property inventory of varying sizes, types, and geographical locations. Allow customization to meet the specific needs of the organization, including covenants on title, rent, resale, and occupancy restrictions.
5. **Occupancy Management & Enforcement:** Track annual reporting of housing units, including review notes for effective enforcement.
6. **Reporting and Analytics:** Generate reports on occupancy types, rental rates, duration of ownership, and other relevant data to assist with WHA KPI tracking.
7. **Owner Communication:** Enable or facilitate seamless communication with owners, including announcements, notifications, and other forms of communication for different distribution lists.
8. **Public Communication:** Provide accessible and understandable publicly available information on properties, including search and mapping functionalities.
9. **Internal Communication:** Incorporate an internal notes section for staff to ensure continuity of program implementation and management.

10. **Integration:** Integrate the platform seamlessly with the WHA website and existing digital systems for efficient and consistent data flow and sharing.
11. **Searchable:** Develop robust search capabilities, both internally for staff and externally with set limitations for public use, allowing property details to be found based on various criteria such as address, owner name(s), and contact details.
12. **Security & Privacy:** Ensure alignment with the [WHA Privacy Policy](#) and the Freedom of Information and Protection of Privacy Act (FOIPPA). All data should be stored within Canada and subject to privacy impact assessments.
13. **Version Control/Back-up:** Provide the ability to export and securely back-up information stored in the Online Housing Inventory Management Platform.
14. **Archived Data:** Allow differentiation between property-related files/information and ownership, enabling archiving of information related to previous ownership when sold.

## SCOPE OF WORK AND DELIVERABLES

Proponent will propose a more detailed, itemized scope of work that may include additional recommendations through a phased approach. However, it is expected that the proposed scope of work for developing and implementing the new Online Housing Inventory Management Platform will include, but not be limited to:

1. **Review & Comprehension:** Undertaking a review of existing WHA Homeownership Inventory to develop an understanding of the WHA's Ownership Housing Program.
2. **Cloud-based Platform:** Develop a fully functional cloud-based platform that includes the key objectives, features and functionality. This may also be the configuration of an existing inventory application. For reference, the WHA primarily uses cloud-based Office 365 for day-to-day business.
3. **System Requirements Specification:** Prepare detailed documentation outlining the functional and non-functional requirements for implementation of the new Online Housing Inventory Management Platform.
4. **Development or Sourcing:** Undertake software development or source existing inventory applications as per WHA's needs.
5. **Database Design:** Create a schema and data model for storing housing inventory and related information.
6. **User Interface Design:** Provide mock-ups demonstrating the visual layout and user interactions of the platform.
7. **Deployment Plan:** Outline the steps required to launch the platform, including a timeline, hosting, configuration, and data migration.
8. **Configuration:** Install and configure the platform on the WHA's preferred and chosen infrastructure.

9. **Testing and Quality Assurance:** Test and deliver results to ensure the platform's reliability and intended performance.
10. **Training and Documentation:** Provide staff training materials, system documentation, and user guides to facilitate smooth implementation, adoption, and understanding of the platform.
11. **Maintenance and Support:** Establish a post-launch support and maintenance plan, including provisions for bug fixes, future enhancements, and system updates.
12. **Future Opportunities:** Explore opportunities for future integration with emerging technologies to further enhance functionality.

## TIMELINE

The EOI for the WHA Online Housing Inventory Management Platform must include a proposed schedule and timeline. The timeline should include, but not be limited to work phased into three phases:

- Phase I: Creating a centralized database for internal access & use.
- Phase II: Creating an external information sharing platform.
- Phase III: Integrating an intake portal for property use.

The schedule may include, but not be limited to:

- Requirements gathering and analysis;
- Research available options;
- Presentation of available options, including pricing estimates;
- System design and documentation;
- Development and testing;
- Deployment and configuration;
- Training and documentation; and
- Maintenance and support.

## DEADLINE

The deadline for submissions of the Expression of Interest: **October 23, 2023 by 4:00 p.m., PST.**

- EOI must be submitted via email to Allison Winkle ([allison@whistlerhousing.ca](mailto:allison@whistlerhousing.ca)).
- Questions may be submitted to Allison Winkle via email no later than the deadline of October 11, 2023 by 4:00 p.m. PST.
- Proponent shall be solely responsible for the delivery and ensuring receipt of their submission in the manner and time prescribed.
- Submissions should include the Proponent's legal name, address, contact person, telephone number, and email address.

- A Proponent may withdraw, revise or amend its Expression of Interest at any time prior to the Submission Time by submitting a clear and detailed written notice of the withdrawal, revision or amendment to [allison@whistlerhousing.ca](mailto:allison@whistlerhousing.ca) prior to the Submission Time.

Proponents to this EOI should include the following:

- Prior experience of applicant, including examples or links to previous similar work;
- Proposed scope of work (including any additional items) for developing WHA Online Housing Inventory Management Platform;
- Proposed schedule and timeline for development of WHA Online Housing Inventory Management Platform; and
- Budget itemized by scope of work for creation and implementation of WHA Online Housing Inventory Management Platform, plus hourly rate(s) for future ongoing consultancy with WHA.

## EVALUATION CRITERIA & SELECTION PROCESS

Proponents submitting an EOI should be aware that various matters may be considered by WHA when evaluating submissions, including but not limited to:

- WHA's assessment of the ability of the Proponent to successfully perform the work;
- The Proponent's experience with similar projects in the past;
- The proposed costs for the work;
- The proposed schedule and timeline;
- The Proponent's references; and
- Other criteria that the WHA, in its sole discretion, may consider appropriate in its evaluation.

Following its initial evaluation, WHA may, in its sole discretion elect to:

- Award or not award the work;
- Enter negotiations with selected Proponent(s);
- Proceed to a competitive process with a revised or redefined scope of work with all, or a selected number of Proponents; or
- Take any other action it deems necessary.

## LIMITATION OF LIABILITY

Each applicant submitting an Expression of Interest acknowledges and agrees that by submitting a proposal:

- WHA bears no liability or obligation to any applicant and each applicant agrees that if it is not awarded the work, then the WHA shall be fully and forever released and discharged of all liability and obligation

to the applicant in connection with this Expression of Interest; and

- No applicant shall have any claim for any compensation of any kind whatsoever from the WHA as a result of participating in this Expression of Interest process, and by submitting a proposal each applicant shall be deemed to have agreed that it has no future claim.

## LAWS OF THE JURISDICTION

Any contract resulting from this Expression of Interest will be governed by and will be interpreted in accordance with the laws of the Province of British Columbia.

## INTELLECTUAL PROPERTY RIGHTS

The Whistler Housing Authority will be the owner of the intellectual property rights, including patent, assignment of copyright, waiver of moral rights, trademark and industrial design in any product, business process, and software or training program developed specifically through this contract. Licensing and marketing rights of the developed product, if appropriate, will be negotiated separately.

Interested firms or individuals are invited to submit their Expression of Interest by contacting the Whistler Housing Authority at the provided contact information below:

### WHISTLER HOUSING AUTHORITY

Allison Winkle  
Housing Administrator

[allison@whistlerhousing.ca](mailto:allison@whistlerhousing.ca)  
604-905-4688 ext. 3

We look forward to receiving your Expression of Interest and exploring the possibility of working together to develop the new Online Housing Inventory Management Platform for the Whistler Housing Authority

Sincerely,

Allison Winkle, Housing Administrator  
Whistler Housing Authority

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