



TOWNSHIP OF **Southgate**

Request for Proposal For a New Official Plan for the Township of Southgate

Issue Date: May 6, 2021

Closing Date: June 4, 2021

Time: 2:00 PM

Location: Township of Southgate
185667 Grey Road 9
Dundalk, ON N0C 1B0
Attention: Clinton Stredwick, Planner
Subject: Official Plan Review Proposal

**Electronic
Submissions:** tenders@southgate.ca

Documents are available in alternat formats upon request. Please contact the Municipal Planner at 519-923-2110 ext. 235 or by email at planning@southgate.ca if you require an accessible format.

Information & Instructions to Consultants

Section 1 - General Information

1.1 Instructions

Proposals must be received at the address, or electronically, as indicated on the proposal submission document no later than 2:00 PM local time, June 4, 2021.

1.1 Definitions

- **Corporation/Township:** Refers to the Corporation of the Township of Southgate
- **Consultant:** Refers to any eligible entity submitting a Proposal
- **Successful Consultant/Consultant:** Refers to the selected Consultant

1.2 Additional Legislation to be Noted

1. Municipal Freedom of Information and Protection of Privacy Act. Any personal information provided in this document will be used for selection purposes only as per the Municipal Freedom of Information and Protection of Privacy Act. Questions about collection of personal information and the Municipal Freedom of Information and Protection of Privacy Act, 1989, R.S.O. 1990, Chapter M.56, as amended, should be directed to:

Lindsey Green, Clerk
Township of Southgate
185667 Grey Road 9
Dundalk, ON N0C 1B0
Telephone (519) 923-2110
ext. 230

2. Accessibility for Ontarians with Disabilities Act, 2005 – The successful bidder must be in compliance with the Township of Southgate Accessible Customer Service Policy under the AODA, 2005.

1.3 Late Submissions

Proposals received after the official closing time will not be considered during the selection process and will be returned unopened to the respective Consultant.

1.4 Submission Withdrawal or Alteration

Any submission may be withdrawn in writing by an authorized representative prior to the Closing Date, or authorized postponement thereof. Any alterations to a submission must be submitted prior to the submission deadline.

1.5 Inquiries

Any questions or concerns arising out of this proposal are to be directed to:

Clinton Stredwick
Municipal Planner
519-923-2110 ext. 235
planning@southgate.ca

1.6 Examination of Proposal Documents

Each Consultant must satisfy himself/herself as to the full requirements of the proposed work. There will be no consideration of any claim, after submission of Proposals, if there is a misunderstanding with respect to the minimum requirements indicated in this Request for Proposal. Should the Consultant require more information or clarification on any point, it must be obtained prior to the submission of the Proposal.

1.7 Required Proposal Format

The Terms of Reference contains several sections all of which need to be addressed to have the Proposal considered. Please ensure the finished document includes all the required information. In order to receive uniform format of responses and information from all prospective consulting firms the following should be addressed and included in the submission:

- Three (3) hard copies and a USB of the proposal must be submitted including a letter of submission signed by an authorized representative of the consulting firm.
- Proposals shall be less than 10 MB in size and shall be less than 50 pages in total length. Proposals shall be limited to standard letter format. Cost Estimates and Work Plan/Timing may be in larger formats. **Proposals larger than 10 MB or longer than 50 pages in length will not be received.**
- Proposals must outline the cost of conducting the review listed in the Terms of Reference both as a total price, total plus HST and cost per task format.
- The proposal shall include a Work Plan/Timing for the review and the projected and expected time frame for the review.
- The proposal will include a summary of the consultant's professional information and history and relevant experience shall be included (a maximum of three (3) relevant experiences are required).
- Proposals must be submitted with a minimum of three (3) references for contact respecting recent and relevant projects.

The Township will not accept proposals of any other format. It is the responsibility of the Consultants to ensure that the proposal has been received and all documents required have been submitted. Submitting a proposal confirms and certifies that the prospective consultant has read and fully understands and accepts the terms of the RFP and its requirements.

1.8 Addendum

The Township may choose to issue an addendum to provide clarification or additional information to interested parties. The Addendum will be distributed to all who have submitted questions and will be posted on the municipal website www.southgate.ca. It is the Consultant's ultimate responsibility to ensure all addendums have been accessed.

1.9 Acceptance or Rejection of Proposal

The Corporation reserves the right to reject any or all Proposals and to waive formalities as the interests of the Corporation may require without stating reasons, therefore.

Notwithstanding and without restricting the generality of the statement immediately above, the Corporation shall not be required to award and accept a Proposal, or recall the Proposals at a later date:

When only one (1) Proposal has been received as result of the Proposal call;
When all Proposals received fail to comply with the minimum specifications;

The Corporation shall not be responsible for any liabilities, costs, expenses, loss, or damage incurred, sustained, or suffered by any Consultant by reason of the acceptance or the non-acceptance by the Corporation of any Proposal or by reason of any delay in the acceptance of a Proposal except as provided in the Proposal document.

1.10 Proposal Selection Criteria

The review and selection recommendation of Consultants will be completed by an evaluation team comprised of staff members from the Township. The criteria outlined below will be used as the basis to compare proposals. The Township reserves the right to engage individual proponents in an interview to obtain further information or clarification on the proposals submitted. The Township retains the option to evaluate proposals based on other criteria or considerations that may emerge as the RFP and proposal process proceeds.

Proposals will be assessed against the following criteria. The Township reserves the right to shortlist firms for further evaluation and interviews which may alter the final scoring results. Proposals will be scored based on meeting or exceeding the expectations of the established evaluation criteria.

Evaluation Criteria	Weighting (%)
Degree to which the proponent responded to the RFP	30
Qualifications/experience of the project team	25
Total price/cost	25
Consultation methods and project process	10
Ability to meet the anticipated schedule	5
Innovative approaches and value added	5

1.11 Proposal Award Procedures

The virtual opening of the submissions shall commence just after 2:00 PM on June 4, 2021, unless the CAO or designate acting reasonably postpones the start to some later hour, but the opening shall continue once started, until the last bid is opened.

Proposals will be assessed on the basis of information provided by the Consultant at the time of submission. The Township will make every effort to complete this process in a timely manner. Notice of acceptance of a proposal will be by telephone and/or by

written notice following the June 16, 2021 Council Meeting.

1.12 Assumptions and Contract

The selected Consultant will be expected to enter into a Contract with the Township addressing the full scope of the work and its obligations to perform the work in compliance with all applicable Federal and Provincial requirements and with the Municipality's Health and Safety requirements. The selected consultant will indemnify the Municipality from all costs, charges and expenses and other claims with respect to the job functions being carried out. This will include possessing and confirming:

- General Liability and/or Professional Liability Insurance minimum of \$5,000,000
- Automobile Liability Insurance minimum of \$5,000,000
- WSIB Clearances (if required)
- Any other labour requirements of the Province

1.13 Governing Laws

This Proposal arrangement and any subsequent arrangements will be interpreted and governed by the laws of the Province of Ontario.

1.14 Conflict of Interest

In addition to complying with the conflict of interest provisions, each Consultant must declare in its proposal any Conflict of Interest (actual or potential) which exists now or may exist in the future in respect of its participation in the RFP process, the submission of its proposal, and, if selected, the performance of its responsibilities. The Municipality will determine, in its sole discretion, whether any situation constitutes or may constitute a real or potential Conflict of Interest and reserves the right, in its sole discretion, to disqualify any Consultant.

Consultants must also describe in the Proposal, their process for identifying, disclosing, reporting, and dealing with conflicts of interest that may arise in the future.

1.15 Confidentiality

Consultants shall not at any time before, during or after completion of the contract, divulge any confidential information communicated to or acquired by the Consultant or disclosed by the Municipality.

Section 2 – Background

2.1 Background Information

The Township of Southgate is inviting proposals from qualified firms/consultants for the provision of consulting services to develop a new Official Plan to replace the current Official Plan, as amended. The objectives of the project are to create a new Official Plan with policies from the Provincial Policy Statement 2020 and all other applicable provincially approved legislation and policy documents and update Township Official Plan policy to ensure conformity with the County of Grey Official Plan. The information contained herein is to facilitate in the preparation of the Consultant's proposal submission.

The Township is seeking a best value proposal and will consider the proponent attributes, quantity and quality of the services offered as well as price.

2.2 Accessibility for Ontarians with Disabilities Act (AODA)

The delivery of goods and services by the Consultant to members of the public on behalf of the Township must comply with Ontario Regulation 191/11 respecting Integrated Accessibility Standards under the Accessibility for Ontarians with Disabilities Act (the "AODA").

2.3 COVID-19 Pandemic

Due to the COVID-19 pandemic, the Township has developed specific policies and procedures, which we would expect the successful consultant to comply with. Due to the fluidity of the situation, technical meetings with staff, meetings with Council and Open Houses may be affected and may be required to be conducted electronically.

Section 3 – Terms of Reference

3.1 Context

The Township of Southgate is located in the southern portion of the County of Grey between Highway 10 and Highway 6 and north of Highway 89. The Township of Southgate is a result of the amalgamation of the Village of Dundalk and the Townships of Egremont and Proton, there are two villages, Dundalk and Holstein, and several rural hamlets that span over 644 hectares (249 sq. miles). The Township of Southgate is the “Southern Gateway” to the County of Grey which is where the Township’s name comes from. The population of the Township was 7,354 in 2016 and is rapidly expanding, particularly in Dundalk, where current population is expected to double in the next 5-10 years.

The Township of Southgate is surrounded by the following municipalities: West Grey, Grey Highlands, Melancthon and Wellington North.

The economy of Southgate is primarily based on agriculture. Agriculture in Southgate is changing with the migration of many Mennonite families from the Waterloo Region. Manufacturing also plays an important part in the community with many new small-scale on-farm industries, as well as retail and the service economy is also a major employer which is mainly concentrated in Dundalk.

3.2 Purpose

The Township of Southgate is issuing an RFP to solicit a qualified Land Use Planning Consultant to develop a new Official Plan for the Township of Southgate. The Project is anticipated to begin mid 2021 and is to be completed by the end of 2021. The new Official Plan will replace the current in effect Official Plan, as amended which received final approval in 2008. The purpose of the new Official Plan is to:

- Replace the current Official Plan with a new Official Plan that reflects new policy initiatives and regulations in the *Ontario Planning Act*, the Provincial Policy Statement 2020, County of Grey Official Plan and other applicable planning legislation and documents.
- Update population projection and complete a development lands needs assessment for a 25 year time horizon. The Township and County have been monitoring growth in Southgate for a number of years and there have been several studies that have been completed regarding growth including a DC Charges Background study, County of Grey Growth Management update study.
- Review and provide either new or updated policy for current topics such as:
 - Second dwelling units
 - Home occupations and home industries
 - On-farm diversified uses
 - Short-term rentals
 - Cannabis

- Affordable housing policy
- Source Water Protection
- Climate change
- Environmental conservation
- Natural heritage
- Natural hazards
- And any other Consultant recommendations

The new Official Plan will provide a long-term Official Plan for the Township of Southgate that will focus on creating economic and sustainable growth as well as a strong, resilient, and vibrant community while being agriculturally and environmentally focused.

3.3 Project Area

The project area includes all lands within the Township of Southgate.

3.4 Scope of Work

The Project is anticipated to start mid 2021 with a completion by the end of 2021. It is anticipated that the review will be undertaken in four phases:

- Phase 1: Background Review and public engagement.
- Phase 2: Proposed Policy Direction
- Phase 3: Draft new Official Plan and public open house and public meeting.
- Phase 4: Refinement and finalization of the new Official Plan, Township of Southgate Council adoption and County of Grey approval

It is required that the selected Consultant will actively engage all stakeholders throughout the process with each phase undergoing at least One (1) public and or Council consultation sessions. It is also the responsibility of the Consultant to use various consultation methods such as open houses, surveys, workshops, information sessions, etc. to ensure all appropriate groups have been consulted and appropriate feedback has been received.

The following is a description of each phase of the Official Plan review and is intended to provide an overview of the process.

Phase 1 Background Review/Study:

The purpose of this Phase is to review the main themes (see purpose section above) and develop policy options that can be considered. This phase will also focus on the commencement of new Official Plan schedules in Collaboration with the County of Grey. The Township utilizes the County of Grey for its mapping needs and GIS software. The Township has purchased 150 hours of time with the County of Grey to facilitate the creation of new Official plan mapping that is utilizes the County GIS software and parcel fabric. It is expected that the consultant will utilize the County of Grey to help with the preparation of the mapping. A deliverable of this phase includes a report on the above consultation efforts.

Phase 2 Proposed Policy Directions

At the completion of Phase 1, a report is required to be provided to Council to provide the background for the identification on the proposed direction of the new Official Plan. A Council workshop would be a deliverable of this phase to review the major themes/issues identified in Phase 1 work and to discuss with Council the proposed direction. The workshop will also provide Council with an opportunity to identify any specific issues that they may have identified with the current Official Plan that should be addressed within Phase 2.

Following the Council workshop, a subsequent Phase 2 report would be prepared identifying: structure and formatting options, approach to new or revised Official Plan policies, incorporating Council and staff input on policy and finalizing the approach on mapping with the County. The report would identify options and provide a recommended approach with the goal to provide clear direction on the Municipality's new Official Plan.

Phase 3 Drafting of the Official Plan

During this phase, the preparation of the draft Official Plan will occur for the purpose of circulation internally, to agencies and stakeholders for review. The statutory Public Open House under the *Planning Act* will also be held, which will include a presentation on the draft document as well as comments from the public to be considered by Council. A deliverable of this phase is the submission of the draft Official Plan and its presentation at a minimum of one (1) open house.

Phase 4 Finalizing of the Official Plan

Preparation of the final Official Plan (with tracked changes) will be presented at the statutory public meeting under the *Planning Act* for any additional revisions and then be considered by Council for adoption. Additionally, should modifications be required by the approval authority, the County of Grey, such modifications shall be prepared. The deliverable of this phase is the submission of a final Official Plan, adoption by Council and approval by the County of Grey.

3.5 Consultation and Meeting Requirements

The Official Plan review will be guided by the Municipal Planner with the assistance of a technical committee. The technical committee will consist of the Municipal Planner, Chief Building Official, Chief Administrative Officer, Public Works Manager and Clerk or designate(s).

The technical committee's role will be to:

- Provide technical input regarding the background study and proposed policy recommendations and co-ordinate meetings;
- Provide technical assistance and coordination for community engagement events and to Council as necessary;
- Circulate and provide Notices in accordance with the *Planning Act*.

The proposal must include a description of the number and type of meetings and consultation opportunities proposed (see section on COVID-19):

- Meetings with Municipal staff and Council and their purpose and outcomes;

- Community consultation meetings by number, type and proposed outcomes;
- Statutory meetings with Council as required by the *Planning Act*;
- Description of the type of webpage to be utilized for this project that attracts public engagement through the project timeline;
- An explanation of how the above can be accomplished through virtual means due to the COVID-19 pandemic and its limitations on meeting gatherings.

3.6 Planning Documents

The Township will provide the current approved Official Plan, the current approved County of Grey Official Plan, mapping is to be done in conjunction with the County of Grey.

3.7 Work Plan

The selected Consultant will be responsible for:

- Public consultation that will promote stakeholder engagement and input;
- Creating a strong web presence through the Township's website;
- All reporting to staff and Council;
- All communications with the public and/or stakeholders through the public engagement process. All communication must be recorded by the consultant.
- Providing a work plan indicating the timing for conducting each phase of the project, the time allocation for each task, the cost of each of the phase broken down by task and the date of final submission to the Township.

3.8 Deliverables

The selected Consultant will be required to provide the following to the Township at the conclusion of the Official Plan project:

1. Five (5) bound hard copies of the draft Official Plan;
2. Ten (10) bound hard copies of the final Official Plan for adoption and approval;
3. One (1) electronic PDF version of all reports;
4. One (1) electronic PDF version of the draft Official Plan;
5. One (1) electronic PDF version of the final Official Plan for adoption and approval;
6. One (1) electronic Microsoft word version of the final adopted Official Plan.
7. An Official Plan layer in the County of Grey GIS prepared by the County and Consultants.
8. Hard copies of all final Official Plan schedules; and,
9. One (1) electronic copy in PDF of all plans, illustrations and/or drawings produced for the project.