

**Corporation of the
Township of Southgate
185667 Grey Road 9
Dundalk, Ontario
N0C 1B0**



**Phone 1-519-923-2110
Toll Free 1-888-560-6607
Fax 1-519-923-9262
www.southgate.ca
info@southgate.ca**

Bid Response - Services

Service: Development Charge Study

Name of Company

Address

Telephone #

Name of Person with Signing Authority

Position of Person with Signing Authority (Please print using ink or type)

Bid documents received at:

**Township of Southgate
Attention: William Gott, CPA,CA
185667 Grey Road 9,
Dundalk, Ontario N0C 1B0**

Township Contact/Project Liaison: William Gott

Email address: wgott@southgate.ca

Notice to Bidders Regarding this Document

Contractors are advised to carefully read the clauses in this document as a Contract Agreement and confirm acceptance of same with approval below:

Witness

Signature of Signing Authority

Date: _____

Instructions to Bidders - Services

Services Information

A sealed tender package, clearly marked "**Development Charge Study RFP**" must be addressed to the following:

Township of Southgate
Attention: William Gott, CPA,CA
185667 Grey Road 9,
Dundalk, Ontario N0C 1B0

And an electronic copy of the tender package should be emailed, with "**Development Charge Study RFP**" in the subject line to:

tenders@southgate.ca

Submission deadline is: February 17, 2022 at 2:00 pm.

Scope of Services Required

The intent of this bid is to seek consulting services to complete a Development Charges Background Study and a five-year review of the township's development charges by-law.

Contacts

Any questions or concerns arising out of this procurement document, should be addressed to:

Name & Title: William Gott, Treasurer
Phone: 519-923-2110 x220
Email Address: wgott@southgate.ca

All questions and requests for interpretation or clarification are to be made in writing to William Gott and shall use the subject line:

"Development Charge Study RFP".

Bidder Notifications

We request that bidders interested in responding to this RFP inform the Township's contact above of their intentions to participate in the process. This will allow the Township of Southgate to inform as soon as possible of any addendum documents that may be issued, requests for information and /or clarification of any questions we receive. Otherwise it will be the respondent's responsibility to monitor the Township website for this information.

Proposal Opening

A virtual opening of the submissions shall commence just after 2:00 pm on February 17, 2022 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, using the following credentials:

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/153910205>

You can also dial in using your phone.

Canada: +1 (647) 497-9391

Access Code: 153-910-205

New to GoToMeeting? Get the app now and be ready when your first meeting starts:

<https://global.gotomeeting.com/install/153910205>

Project Timelines

The Township of Southgate approximate project timelines are as follows:

- i. Procurement Closing date: February 17, 2022
- ii. Commencement of Bid Evaluations: February 18, 2022
- iii. Recommendation to Council for Approval: March 2, 2022
- iv. Notification of Successful Contractor: March 3, 2022
- v. Commencement Date: ASAP
- vi. Final Presentation to Council Date: No later than October 5, 2022

Payment Terms:

Each bid proposal shall provide a payment terms based on the bid price submitted for the service as work is completed.

General Conditions - Services

Extent

The Contractor shall be liable for all costs of doing the work including labour, equipment and all materials to complete the service work.

Contractor's Responsibility

Upon notification of acceptance of the contract and before the commencement of work, the contractor must provide the Township of Southgate with a Certificate of Insurance as per the following:

- (a) The Contractor shall be protected and indemnify and save harmless the Corporation of the Township of Southgate from any and all claims which may arise from the Contractor's operations where bodily injury, death or property damage is caused, and shall, without restricting the generality of the foregoing, maintain insurance acceptable to Southgate, subject to limits of liability of not less than \$3 million inclusive.
- (b) All liability policies shall be written in such terms as will fully protect the Contractor notwithstanding his assumption of liability and his indemnity covenants under the contract.
- (c) All liability insurance policies shall be written in the names of the Contractor and the Corporation of the Township of Southgate and shall be subject to a cross liability clause. The Contractor agrees to provide to Southgate a Certificate of Insurance in compliance with the above including a warranty that the insurer will not cancel said policies without thirty days written notice of such cancellation provided to Southgate. Such certificate shall clearly indicate the amount deductible/applicable, if any.
- (d) Certificate of such other insurance as the owner may from time to time deem necessary.
- (e) The Contractor shall maintain such insurance and pay such assessments as to protect both the contractor and the owner from claims under the Workers' Compensation Act.

Workers' Compensation

The Contractor shall submit a Clearance Certificate every 60 days during the active working period and at completion of contract.

Protection of Property

The Contractor will be responsible for any damage that may occur relative to the execution of all operations arising from this contract. Any damage done to Southgate's or surrounding property must be made good to the satisfaction of Southgate.

Applicable Legislation

- A. The Contractor shall comply with all applicable Provincial and Federal legislation and regulations, including the Occupational Health & Safety Act and pertinent Southgate by-law.
- B. 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.
- C. Accessibility for Ontarians with Disabilities Act, 2005 – The successful contractor must be in compliance with the Township of Southgate Accessible Customer Service Policy under the AODA, 2005 and provide proof that training requirements have been met.

Protection

Temporary safeguards and protection shall be provided to adequately guard against injuries to the public, particularly children and workmen, by accidents around and adjacent to the project.

Termination

If, at the discretion of the Township of Southgate, there is default by the Contractor of any of the terms contained herein, Southgate shall have the right to terminate the contract upon giving the Contractor twenty-one (21) days notice to address the concerns or issues to successfully complete the project.

Upon termination of the contract, the balance of the contract price shall be forfeited.

Acceptance or Rejections

- Lowest or any Bid proposal is not necessarily accepted.
- All Bid proposals must provide pricing for each of their submissions.

Southgate reserves the right to award the services required to the contractor with the best proposal for the Township of Southgate. Southgate also reserves the right to reject any or all bids or award the contract to other than the lowest bid received, if in Southgate's opinion, it is in the best interest of the Township.

Project Progress Meetings with Contractor

The successful bidder will be required to hold project progress meetings at least once every 30 days, or more frequently, if required by the Contractor or the Township's project management review team.

Proposals Must Include

- a) Description of Firm - Firm's brief history with highlights of services provided.
- b) Curriculum Vitae/Expertise - An outline of qualifications and experience of the team members, including all sub-contractors to be assigned to complete any of the services. Indicate the names of all personnel, and experience that will be involved in the delivery of the service to the Township.
- c) Team Organization - The respective roles and responsibilities team members will take in the project team organization and in the development of design/tender documents, contract administration and commissioning of the project.
- d) Experience - Brief description documenting at least three previous engagements with other similarly sized government entities to the Township that outlines projects of similar scope, cost, and magnitude completed in the past two years. This shall include client names, contact, and contact phone numbers. The Township may verify references as part of the proposal evaluation process.
- e) Delivery Schedule - An outline of the approach proposed to meet the requested schedule(s) and what other resources will be made available by the proponent to meet service schedules should delays occur.
- f) Cost Control - An outline of the approach proposed to effect cost control for the Township.

Evaluation and Selection - Services

Selection Process

Proposals will be assessed on the basis of information provided by the Respondent at the time of submission. The evaluation of Proposals will be conducted by an evaluation team comprised of staff members from the Township of Southgate and reserves the right to interview and facilitate presentations in order to gain additional detail outside of the proposals received.

Evaluation Criteria

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	Weight Factor
1.	Qualifications and Experience of Company	15
2.	Methodology	15
3.	Work Plan/Schedule of Work	20
4.	Approach to Cost Control	10
5.	Project Cost	40
	Total	100

The Township reserves the right to reject any or all proposals. The Township also reserves the right to not proceed with the services proposal without stating reason thereof.

Selection of a proposal(s) will be based on all the above criteria and any other relevant information provided by the Respondent(s).

All proposals are to be submitted with the understanding that the selection of a proposal for discussion by the Evaluation Committee shall not thereby result in the formation of a contract. Nor shall it create any obligation on the Township to enter further discussions.

The services required will be awarded to the respondent who, in the sole judgment of the Township, provides the best overall value. The Township will not be obligated to select the lowest cost or any proposal.

The Township reserves the right to conduct references on the Respondents, the results of which may affect the award decision.

Proposal Specifications/Requirements - Services

1. Scope of Services and Work Required

The consultant will be responsible for the preparation of a Development Charges Background study which will result in updating the calculations of the Township's development charges in accordance with the Development Charges Act. The Consultant will also attend the public meetings, and provide an updated Development Charges By-Law. The Consultant must also be available to the Township as an expert witness in the event of an appeal of the Development Charges By-Law to the Ontario Land Tribunal, and will receive additional compensation based on that stated hourly rate.

2. Specifics and Details of Services Expectations

- a. Develop an updated Development Charges Background Study that includes any optional approaches that might be considered for maximising the Township's opportunities and in accordance with the requirements of the Development Charges Act, as amended. The Consultant will be required to collect an appropriate database from Township sources to support the development of the Development Charges Background Study.
- b. The Consultant will utilize data from, but not limited to, the following sources as background information for the Development Charges Study:
 - i. The Township's Asset Management Plan;
 - ii. Watson & Associates 2017 Development Charges Background Study;
 - iii. County of Grey Growth Management Strategy 2021; and
 - iv. Southgate's 2022 Capital Budget and 10 year Plan
- c. Initial start-up meeting with Council to confirm review and scope of work.
- d. Finalize a project charter, timeline, and key milestones for developing the Development Charges Background Study and draft Development Charges By-Law.
- e. Facilitate meetings and discussions with Council and staff as appropriate.
- f. Prepare a draft report and By-Law for Council consideration. This report will include all policy recommendations, Development Charges calculation methodologies, background technical information, and the legal basics on which the findings of the report can be sustained. The Consultant will also draft responses to inquiries with respect to process, study, and proposed by-law for approval by Council.
- g. The Consultant shall explore the following matters as part of the preparation of the Development Charges By-Laws update:

- i. Consideration of providing a deferral agreement for development charges when proposing to construct affordable housing units;
 - ii. Unidentified capital growth requirements. Specifically, how growth-related capital plans and costs may change and how to best address these changes;
 - iii. Calculating the incremental operating costs related to growth expenditures.
- h. The Consultant will present the final report and By-Law to Council no later than October 5, 2022.
- i. The Consultant will work with Southgate Council and other Township staff to complete this project work. Council and staff will provide guidance and direction to the Consultants and also provide background information and data as requested. The Consultant's principal contacts with the Township of Southgate will be the Chief Administrative Officer and the Treasurer.
- j. The Consultant will provide expert advice on each key decision and recommendation.
- k. The Consultant will assist with the drafting of notices of public meetings and notices of the by-law passage as required for the Township. The Consultant will also need to be in attendance for the public meeting(s).
- l. The Consultant will prepare a draft of an information pamphlet in accordance with the requirements of the Development Charges Act.
- m. The Consultant will be available to the Township as an expert witness in the event of an appeal of the Development Charges By-Law to the Ontario Land Tribunal.

Contractor Health and Safety Agreement - Services

It is our objective at the Township of Southgate, to provide all persons within our workplace, the opportunity to work in a safe environment. It is the Municipality's Policy to totally eliminate all accidents through Health and Safety Standards. All Employees, Contractors, Subcontractors, Suppliers and any other Service Providers to our projects must co-operate and make all reasonable efforts to ensure the maximum protection and minimum inconvenience to the general public, occupants, and the environment.

The Township of Southgate believes the following ideals must be accepted and followed in order to ensure safety on our projects:

1. Any Contractor hired by Southgate must ensure that their employees have safety training and certificates equal or exceeding the requirements set forth in the current Occupational Health and Safety Act and current regulations.
2. The Contractor(s) on the project must work in conjunction with Southgate's appointed Health and Safety representatives. All Contractors must follow Health and Safety policies set forth by Southgate.
3. The Contractor must report and investigate all incidents, and near accidents to the Southgate's Public Works Manager, and Health and Safety representatives within 24 hours.
4. Health and Safety issues will always be given immediate attention by the Municipality, its representatives, contractors and subcontractors.
5. All applicable current and environmental legislation/regulation(s) are considered a minimum requirement;
6. All employees, contractors/sub-contractors, suppliers and visitors/residents must immediately report unsafe conditions, incidents, and accidents to Southgate's Project/Site Supervisor or the Township of Southgate's Occupational Health and Safety Committee;

Failure to adhere to one of the above stated requirements would jeopardize the Health and Safety of all. Through a safety conscious workforce, the quality of work and production will ensure safe and timely project completion. All accidents will be investigated to determine the causes and corrective actions to prevent recurrence.

Disciplinary Action in the form of:

Step 1 – verbal warning

Step 2 – written warning

Step 3 – notification to the Ministry of Labour re: Health and Safety Violations of the Legislation/regulation(s), and unsafe work practices.

Southgate takes pride in the commitment of our employees and contractors, and will take the necessary steps to ensure Health & Safety on all projects.

Note: A WSIB Certificate must be attached.

Contractor Approval:_____ **Phone Number:**_____

Contractor Responsibilities	Municipal Required	Contractor Submitted
Documentation: <ul style="list-style-type: none"> ▪ WSIB Certificate of Clearance (equivalent private) ▪ Liability Insurance Certificates \$3,000,000 minimum ▪ Health and Safety Policy Statement and Operating Procedures ▪ WHMIS 2015 Training Completed (proof required by the successful bidder) ▪ MSDS Training for all controlled products to be on the work site ▪ Traffic Plan & Control Training 	<div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>	<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>
General Requirements: <ul style="list-style-type: none"> • Comply with all Legislation, Regulations and Codes • Enforce compliance with Municipal issued safety violations • Perform regular safety inspections of project • Employ only qualified competent workers on project • Provide qualified competent on-site supervision • Provide copies of MOL reports, orders, charges related to the project within 24 hours of receipt • Provide accident reports for critical injuries related to this project to Municipality within 24 hours and all other accidents within 3 days 	<div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div> <div><input checked="" type="checkbox"/></div>	<div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div> <div><input type="checkbox"/></div>

Required Bidder Documents Checklist - Services

Signature: _____

Dated: _____

Bidder Information Responses - Services

Statement of Qualifications:

Experience—Statement of Company' expertise in this Business

Note: Attach any brochures and company profile that would support this section.

Contractor References

Company

Contact

Phone #

Bid Form Pricing Submission - Services

Bid Proposal Pricing:

Quantity	Description	Price
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Total Proposal Costs		_____

Other Optional Costs:

Description	Order Qty.	Unit Price
Expert witness in the event of an appeal of the Development Charges By-Law to the Ontario Land Tribunal	Hourly Rate	\$_____
_____	_____	\$_____

Bidder Checklist and Submissions Requirements-Services

Proposal Submission Inclusions:

The RFP proposal submission shall include the following documents:

1. A copy of this RFP document as provided with all signature approvals;
2. Complete the Contractor Health & Safety Agreement form;
3. Complete the Services Compliance Acknowledgements;
4. Complete the Required Bidder Documents Checklist forms;
5. Provide the Bidder Information Responses;
6. Complete the Bid Form Pricing Submission;
7. Include the Bid Deposit if applicable;
8. Complete the Bid Form Declaration; and
9. Provide any supporting documentation, materials, proposal explanations, etc. will be accepted and used as part of the selection process.

Services Contacts & Compliance

The purpose of this document is to determine a contractor's ability and intention to comply with the Township of Southgate's contractor safety requirements.

Contractor Company Name: _____

Contractor Phone: _____

Cell phone: _____

Site Supervisor: _____

Company Health & Safety Rep: _____

Bid Form Declaration - Services

This Bid Proposal is submitted by: _____

To: The Township of Southgate

1. I _____ **OF** _____

DECLARE that no person, firm or corporation other than the one whose signature or the signature of whose proper officers and the seal is or are attached below has any interest in this Proposal or in the contract proposed to be taken.

2. I FURTHER DECLARE that this Proposal is made without any connection knowledge, comparison of figures or arrangement with any other company, firm or person making a Bid for the same service and is in all respects fair and without collusion or fraud.

3. I FURTHER DECLARE that no employee of the Township or elected official is or will become interested directly or indirectly as a contracting party or otherwise in the performance of the contract or in the supplies, work or business to which it relates or in any portion of the profits thereof, or in any such supplies to be used therein or in any of the monies to be derived therefrom.

4. I FURTHER DECLARE that the several matters stated in the said Proposal are in all respects true.

5. I FURTHER DECLARE that I have carefully examined the Proposal, Instruction to Bidders, General Conditions, Proposal Specifications/Requirements proposed and hereby acknowledge the same to be part and parcel of any contract to be let for the service therein described or defined and do all the work and to provide the services of the requirement mentioned for the prices stated on the Bid Form Pricing Submission.

6. I FURTHER DECLARE that I have a clear understanding of all the work involved in this contract.

7. I FURTHER DECLARE that this offer is to continue to be open to acceptance until the formal awarding is made to the successful Bidder for the said service OR for a period of sixty (60) days after the closing date, whichever first occurs and that the Township may, at any time, within that period, without notice, accept this Proposal whether any other Proposal has been previously accepted.

8. I FURTHER DECLARE that the awarding of the service based on this Proposal by the Township shall be an acceptance of this Proposal.

9. I FURTHER DECLARE that in the event of default or failure on our part, that the Township shall be at liberty to advertise for new Proposals, or to carry out the

works in any other way they deem best, and we also agree to pay to the said Township the difference between this Tender and any greater sum which the said Township may expend or incur by reason of such default or failure or by reason of such action as aforesaid, on their part, including the cost of any advertisement for new Proposals; and to indemnify and save harmless the Township of Southgate and their officers from all loss, damage, cost charges and expenses which they may suffer or be put to by reason of any such default or failure on our part.

(COMPANY NAME)

(SIGNATURE)

(ADDRESS)

(PRINT NAME & TITLE)

(CITY OR TOWN)

(WITNESS OR SEAL)

(POSTAL CODE)

(DATED)