



**The Corporation of the  
Township of Brock**

**Request for Proposal  
BROCK-RFP No. 2020-02**

**Building Our Best Brock  
Official Plan Review Study**

**INTRODUCTION**

The Township of Brock is requesting proposals for consulting services for a Municipal Comprehensive Review of Brock's Official Plan. The project is referred to as Building Our Best Brock and will require the applicant to engage the residents of Brock Township throughout the Official Plan review study process. The project is structured to be undertaken in 8 modules over 2.5 years, that will result in a revised Official Plan.

The municipality presents three distinct urban areas, numerous hamlets, and beautiful countryside. While agriculture is our largest employer, a full range of commercial and industrial businesses are located within the urban areas of Beaverton, Cannington and Sunderland. The Township's location on Lake Simcoe and the Trent-Severn Waterway make it a popular destination for tourists in both summer and winter.

Brock is a lower-tier municipality in the Region of Durham and currently has an Official Plan that is 15 years old. The Township is poised for significant growth soon and requires a comprehensive Official Plan study that results in a strategic, creative and detailed Official Plan to ensure healthy and vibrant communities in Brock.

**DEADLINE**

Proposals shall be submitted no later than **3:00 p.m. (three) on March 12, 2021** by email to [clerks@townshipofbrock.ca](mailto:clerks@townshipofbrock.ca) with the Subject Line: "RFP No. 2020-02 Submission by [insert company name]".

**QUESTIONS**

Any questions regarding this proposal should be submitted by email by February 18, 2021 to [clerks@townshipofbrock.ca](mailto:clerks@townshipofbrock.ca) with the Subject Line: "RFP No. 2020-02 – Question for Clarification".



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## 1.0 INSTRUCTIONS TO PROPONENTS

### 1.1 Submission Details

Proposals shall be submitted no later than **3:00 p.m. (three) on March 12, 2021** by email to [clerks@townshipofbrock.ca](mailto:clerks@townshipofbrock.ca) with the Subject Line: "RFP No. 2020-02 Submission by [insert company name]". It is suggested that a read receipt be requested in your submission email.

### 1.2 Modification of Bids

Modifications to bids already submitted will be allowed if submitted by email (and confirmed) prior to the time fixed in the Request for Proposals.

The Township of Brock reserves the right to waive irregularities and to reject any or all bids. The Township of Brock also reserves the right to negotiate with the preferred Proponent, particularly in the event that the price exceeds available funds.

### 1.3 Insurance and Indemnity

The successful proponent shall, at its own expense, obtain and maintain until the termination of contract, and provide the Township of Brock with evidence of:

- Comprehensive general liability insurance on an occurrence basis for an amount not less than Five Million (\$5,000,000) dollars, and shall include the Township of Brock as an additional insured with respect to their operations, acts and omissions relating to its obligations under this Agreement, such policy to include non-owned automobile liability, personal injury, broad form property damage, contractual liability, owners' and contractors' protective, products and completed operations, contingent employers liability, cross liability and severability of interest clauses;
- Automobile liability insurance for an amount not less than Five Million (\$5,000,000) dollars on forms meeting statutory requirements covering all vehicles used in any manner in connection with the performance of the terms of this Agreement.

The successful proponent shall indemnify and hold the Township of Brock, its officials, agents and employees harmless from and against any liability, loss, injuries, claims, demands, costs and expenses, including reasonable legal fees, occasioned wholly or in part by any acts or omissions either in negligence or in nuisance whether willful or otherwise by the Proponent, its agents, officers, employees or other person for whom the Proponent is legally responsible.



## 1.4 Mandatory Requirements

The Township is seeking Proposals from firms who are both interested and capable of supplying the services. The onus is on the Proponent to demonstrate its knowledge, understanding and capacity to supply the requested services. The detail and clarity of the written submission will be indicative of the Proponent's expertise and competence. Please ensure your proposal includes the following mandatory elements:

- **Project Understanding and Approach** - The Proponent shall include a narrative that demonstrates its understanding of the requirements of this RFP. Include a description of the proposed approach to the Project and how potential issues, areas of concern and obstacles will be addressed throughout the study.
- **Methodology and Work Plan** - The Proponent shall provide a detailed methodology of how it would efficiently provide this service to the Township by the specified timelines. Provide details on key/critical tasks throughout each assignment, including provisional items if necessary. Include a detailed Time-Task matrix including hourly rates for all phases of each deliverable.
- **Similar Work Experience** - The Proponent must demonstrate its ability to complete projects with a similar scope of work by providing a brief description of a minimum of three (3) projects for each deliverable completed within the past five (5) years. Include references.
- **Project Team** - The Proponent shall identify an overall Project Lead responsible for the completion of all deliverables. The Proponent may choose to have multiple Project Managers to manage the completion of each deliverable. For each Project Manager proposed, provide a brief synopsis of similar projects managed by this individual. Describe the Project Manager's experience and qualifications and detail their role leading projects with similar deliverables. The Proponent shall append curriculum vitae for the Project Manager(s) that highlights relevant experience. The Proponents shall also identify their proposed "back up" Project Manager who would assume such duties, if approved by the Town, should the original Project Manager become unavailable during the Project.

The Proponent shall identify all other team members who will have significant roles in the project including sub-consultants. Provide a brief synopsis of the role of each team member and sub-consultant, their qualifications and experience with similar projects, and append supporting curriculum vitae.

The Proponent shall also include a Project Team Organizational Chart, indicating reporting relationships and key roles.



## 1.5 Clarification of Proposal Documents

Any clarification of the Proposal documents required by the Proponent prior to submission of its Proposal shall be requested through the Township of Brock. The Proponent and the Township of Brock hereby agree that in no case shall oral arrangements be considered.

No officer or employee of the Township of Brock is authorized to alter orally any portion of these documents. During the period prior to submission of Proposals, alterations will be issued to Proponents as written addenda. The Proponent shall list in its Proposal all addenda that were considered when its Proposal was prepared.

If any Firm has questions concerning this RFP, finds discrepancies or omissions in the document, or requires clarifications, such matters shall be submitted by email to:

Mrs. Becky Jamieson  
Municipal Clerk

Telephone: (705) 432-2355 ext. 240  
E-mail: [bjamieson@townshipofbrock.ca](mailto:bjamieson@townshipofbrock.ca)

The Township reserves the right to request additional data or information after the Proposal date, if such data or information is considered pertinent, in the Township's sole view, to aid the review and evaluation process.

The Township reserves the right to supplement, add to, delete from and change this solicitation document. Firms will be advised by e-mail of any changes that are made.

The Township reserves the right to reject any portion of any RFP and/or reject all RFPs, to waive any informalities or irregularities in the RFP, or to re-invite, or to re-advertise.

## 1.6 Pricing Requirement

Prices shall be in Canadian Funds and shall include charges of every kind attributable to the work. The proposed prices shall not be subject to adjustment for any additional costs incurred by the company, except as may be provided elsewhere in this document.

## 1.7 Terms of Payment

Payment of contract shall be in accordance with the terms of payment indicated in the contract. The Township of Brock shall have the right to withhold from any sum otherwise payable to the company such amount as may be sufficient to remedy a defect or deficiency in the work, pending correction of same.



## **1.8 Assignment**

The Proponent shall not assign the contract or any portion thereof without the prior written consent of the Township of Brock.

## **1.9 Laws and Regulations**

The Proponent shall comply with relevant Federal, Provincial and Municipal statutes, regulations and By-laws pertaining to the work and its performance. The company shall be responsible for ensuring similar compliance by its subcontractors. The contract shall be governed by and interpreted in accordance with the laws of the Province of Ontario.

## **1.10 Contract**

A contract between the successful Proponent(s) and the Township of Brock will be required. The Township of Brock will prepare the draft contract, and the Request for Proposals and Project Proposal shall form the appendices.

## **1.11 Ownership**

Any and all drawings, specifications, studies, electronic data, estimates, inventions, discoveries, improvements, concepts, enhancements, and ideas or any portion thereof that the Company may conceive, make, invent or suggest, either solely or jointly with the Township of Brock at any time during the provision of the Services, whether at the request or upon the suggestion of the Township of Brock, and whether or not patentable or copyrightable (and such drawings, enhancement, idea, program or portion thereof and any and all derivative works created or prepared from the foregoing being hereinafter referred to as "Work Product") shall fully, freely and immediately be communicated by the Company to the Township of Brock and shall belong to and be the Township of Brock's sole and exclusive property. The Company shall not at any time, whether during or after the termination or expiration of this Agreement, apply for any letters of patent, design, copyright, trademark or other form of protection whatsoever in Canada or elsewhere for the Work Product.

The Company hereby irrevocably assigns to the Township of Brock any right, title, or interest the company now has or may hereafter acquire in, to, and under all Work Product, and to any patent, copyright, trademark, or other proprietary or intellectual property rights or interest in, to, and under such Work Product. The Township of Brock shall be the sole and exclusive owner of all patents, copyrights, trade secrets and other proprietary or intellectual property right or interest in connection with such Work Product.



## 2.0 TERMS OF REFERENCE

All Proposals must account for the following scope of work for the elements of the project. If the Proponent recommends additional scope, substitutions and/or value related alternatives, it should be clearly described in full, with reasons for the alternative and a separate pricing for its inclusion.

### 2.1 General Scope of Work

The Official Plan review study will require constant and dedicated on-line consultation efforts using Bang the Table, the Township's new public engagement platform called "Let's Talk Brock" (still in development). Provisions for hard copy availability and by-phone consultation will also be required to ensure accessibility to documentation and participation. The project has been divided into seven (7) modules of study. A consistent approach to developing a policy recommendation document for each module is required and will contain the following steps (at a minimum):

- a) Study the Existing Conditions and determine module goals
- b) Inform and Engage residents through "Let's Talk Brock" to describe the existing conditions and engage residents on feedback and ideas for moving forward.
- c) Draft a module Discussion Paper and virtually present the paper to the public and solicit feedback. The paper is also to be circulated to commenting agencies and the Region of Durham.
- d) Summarize feedback from the Discussion Paper circulation and public consultation and prepare a Module Policy Recommendation report.
- e) Present the report to Council for endorsement. The endorsed report will form the basis of that module's input into the revised Official Plan.

The seven (7) modules will study and consult on the following:

1. Vision and Strategic Directions
2. Housing / Living Areas
3. Growth Management
4. Natural Heritage and Environmental Opportunities
5. Infrastructure Policy Analysis
6. Healthy Communities



## 7. Economic Development

The Region of Durham is currently in the final stages of their Municipal Comprehensive Review (MCR) process entitled Envision Durham. Brock's revised Official Plan will require compliance with all provincial policies and the Region's updated Official Plan when complete.

### 2.2 Detailed Scope of Work

The following work will be required to complete this project. Should the proponent suggest variations to the project deliverables or suggested execution, please provide a detailed explanation with your suggested changes and separate pricing as noted above.

Each Module process is expected to follow steps a) through e) as described in 2.1.

#### 2.2.1 Module #1: Vision and Strategic Directions

This module involves seeking public input on how our residents would like to grow in the future and what strategic policy support can be put in place to support that growth.

#### 2.2.2 Module #2: Housing / Living Areas

This module looks to identify the full range of issues including intensification opportunities, affordable housing issues and the full spectrum of policy matters from the PPS, Growth Plan and Region of Durham Official Plan.

Additionally, this module will specifically address the issues related to Interim Control By-law (ICBL) 2994-2020. The ICBL is in effect until November 23, 2021 and requires the study of the land use impacts of modular construction (including Manufactured Dwelling Houses), tiny homes and Supportive Housing Facilities. In addition to the Policy Recommendations report, this module will require the preparation of an Official Plan Amendment (OPA) and By-law Amendment (ZBA).

#### 2.2.3 Module #3: Growth Management

This module will address the growth management components of the Growth Plan and the Regional Official Plan, and the growth targets contained in both. Regional data will be available to support this module from the Envision Durham process. Study areas include intensification locations and policies to satisfy growth targets, employment land suitability, and forecasts to determine need, supply and demand. Policy direction for meeting growth targets will be identified. This module will have natural connections to Module #7: Economic Development.



#### **2.2.4 Module #4: Natural Heritage and Environmental Opportunities**

This module will review the identified natural heritage features and functions within the Township (recognizing system connections). Policy direction on best practices to protect and enhance the natural assets in Brock will be required.

#### **2.2.5 Module #5: Infrastructure Policy Analysis**

This module will review the best practices in municipal infrastructure construction and maintenance, and consider the policy directions formed in modules #2, #3 and #4 to ensure all policy options with respect to water, wastewater, stormwater, roads and active transportation matters are considered. Climate change and Low Impact Development (LID) policy recommendations will be required.

#### **2.2.6 Module #6: Healthy Communities**

This module will provide the policy recommendations for building, maintaining and enhancing healthy communities in Brock. Recreation, community improvement, accessibility, community and age friendly design, community facilities and cultural heritage will all be considered.

#### **2.2.7 Module #7: Economic Development**

This module will address the policy recommendations to support economic development in Brock given the policy context of the Regional Official Plan and the Greenbelt Plan. Cannabis as an economic development tool will be explored.

#### **2.2.8 Revised Official Plan**

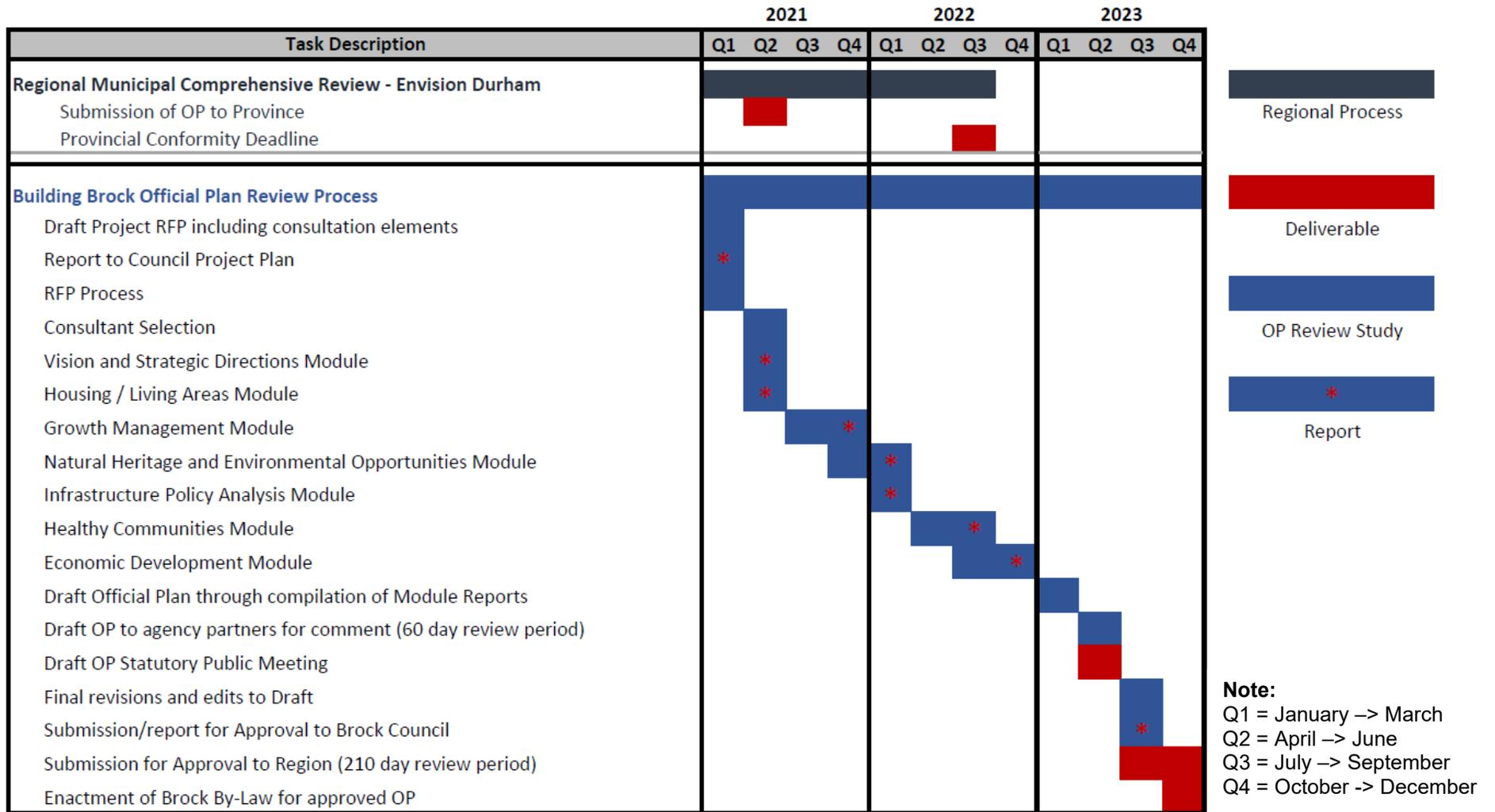
The culmination of the seven modules noted above will form the policy basis of the revised Official Plan. Provisions should be made for one major revision to the created draft plan in the budgeting process. The successful firm will be expected to participate in each approval process until the Official Plan is in force. Any appeals of the Plan will be dealt with outside of this project's timeline and budget.

### **2.3 Project Timetable**

The following general guideline has been provided. Module #2 must be completed by September 2021 to allow for the OPA and ZBA to be approved in advance of the November 23, 2021 ICBL expiration date.



### Building our Best Brock Project Timeline



## **2.4 Qualifications of Firm**

The Firm shall demonstrate:

- Experience and expertise in municipal land use planning;
- Experience and expertise in researching both social and technical land use planning issues;
- Specific experience relating to supportive housing and housing options;
- Expertise and capacity to perform the necessary engagement, process facilitation and consultations virtually;
- Experience and expertise preparing Official Plan Amendments and Zoning By-law Amendments;
- Experience and expertise providing mapping deliverables; and
- Expertise creating public-friendly guidance documents that conform to municipal accessibility standards, prepared in paper and electronically accessible formats.

## **2.5 Role of Firm**

The Firm will provide independent expertise and advice and shall:

- Work closely with Township staff through each module and stage of the project;
- Present each module report as well as the revised Official Plan to Council;
- Work cooperatively with Township staff to undertake and manage consultation/engagement efforts;
- Prepare the OPA and ZBA for Module #2 and all Module reports;
- Prepare Brock's revised Official Plan; and
- Maintain continuous dialogue regarding the status of the project with Township staff.

## **2.6 Proposal Structure / Schedules**

Each Firm shall respond to each of the following questions in a clear and comprehensive manner organized by Schedule as listed below.



**2.6.1 Schedule A – Proposal** should include the following:

- a) Your Project Work Plan and Schedule, including any identified additional work you feel is appropriate that exceeds the defined scope of work. These costs should be listed separately.
- b) Provide a confirmed cost for the project and expected payment schedule.
- c) A signed Declaration by the owner/partner that has authority to bind your firm.

**2.6.2 Schedule B – Qualifications**

- a) Provide the full name and main office address of the Firm.
- b) Identify when the Firm was organized, and if a Corporation, when incorporated and how many years engaged in providing this type of service.
- c) Identify and set out the qualifications of any Firms or individuals that the Firm intends to subcontract, or otherwise use, to perform work on this project.
- d) Describe the Firms specific and relevant experience related to the scope of this project.
- e) Describe the Firm's depth and resources that would also be available for the benefit of this project.
- f) Identify the personnel who would take the lead position in this project and set out their particular qualifications and experience in carrying out this type of work.
- g) Identify the amount of municipal staff time required.
- h) Provide references from three (3) recent projects that relate to this project that the Firm has completed and, if not included in the foregoing, a reference from a municipality of similar size and geographic components as the Township.

**2.6.3 Schedule C – Additional Information** should include:

- a) Any additional detailed information to support your proposal.
- b) Any examples you may wish to show of previous studies completed similar to what is being requested.



## 2.7 Final Deliverables

The following items shall be delivered to the Township upon completion of the project as described in the sections above:

- One (1) unbound copy of each report created;
- Three (5) bound copies of each report created;
- One (1) electronic copy of the above reports in Microsoft Word, formatted in accordance with AODA Regulation 191/11 and appropriate for on-line accessibility;
- GIS layers of all mapping products;
- All materials received and produced by the Firm in the undertaking of this project; and
- In general, all reports and presentation materials shall be in a form and of a quality so as to be acceptable for reproduction and presentation and shall be acceptable to the Township. All information and files required to complete this project will become property of the Township.

## 3.0 PROPOSAL EVALUATION

It is understood that the information in the RFP is a combined Statement of Qualifications (Qualifications) and a Price Proposal (Proposal) and shall be the general basis for the selection of a Firm to provide this professional service and study.

The Township expects to select the highest scoring Firm based on a structured scoring evaluation. The scoring evaluation shall consider each Firm's ability to perform the required service, experience, approach to the project, the personnel assigned to the actual project work, the costs of the project, the time period in which the project will be completed, the reference checks and the clarity of the submission, in relation to the scoring matrix.

Proposals will be evaluated on the bases of the criteria listed below. The Township reserves the right not to accept any Proposal. Firms will be evaluated based on the points system identified in the table below. Failure to provide relevant information may result in penalties to the scoring system.



In addition, and at the sole discretion of the evaluation team, an interview/presentation may be required. The purpose of this interview would be to clarify the qualifications and methodology of the Firms and their proposals.

	<b>Component</b>	<b>Maximum Score</b>
1	Understanding/Approach	20
2	Methodology/Work Plan	20
3	Similar Work Experience	15
4	Project Team	20
5	Price	25
	<b>TOTAL</b>	<b>100</b>

## **4.0 AWARD AND APPROVAL**

### **4.1 Bid Acceptance**

The Township of Brock reserves the right to award by item, or part thereof, groups of items, or parts thereof, or all items of the Proposal, and to award contracts to one or more Proponents submitting identical Proposals as to price; **to accept or reject any Proposal in whole or in part**; to waive irregularities and omissions, if in so doing, the best interest of the Township of Brock will be served. No liability shall accrue to the Township of Brock for its decision in this regard. Proposals shall be irrevocable for 90 days after the official closing time.

### **4.2 Requirements Upon Award**

The successful Proponent shall not make any claims for additional costs, or expenses, due to the delay in, or cancellation of, the award of this RFP.

The successful Proponent will be required to submit, within 10 business days of notification of award of the RFP, and prior to start of Work, the following:



**The Corporation of the Township of Brock**

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- I. Required copies of the signed Agreement;
- II. Certificate of Insurance; and,
- III. Proof of a valid and current Clearance Certificate or proof of exemption from the WSIB.

Thank you for your time, attention and submission in response to this RFP.

TOWNSHIP OF BROCK

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Dean A Hustwick, CAO

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Date