

Terms of Reference

Kleinburg-Nashville Focused Area Review

1. Introduction

On May 7, 2007, Vaughan Council approved the Terms of Reference for the New Vaughan (city-wide) Official Plan. Within the approved Terms of Reference for the New Official Plan project, the Kleinburg-Nashville Community Plan is identified as one of four Focused Area Studies to be undertaken.

The rural/agricultural area of Kleinburg-Nashville is currently subject to strong development pressure, particularly the area surrounding the Nashville Core. Accordingly, there is a need to proceed with a more detailed land use study and analysis that will result in updated land use, urban design and development policies which satisfy recent changes to the Provincial and Regional policy context.

The Review will result in an amendment to the Kleinburg-Nashville Community Plan that will be consistent with the principles, goals and objectives identified in the process leading to the New Vaughan Official Plan. In order to achieve this, it will be imperative that the consulting team chosen for this Review collaborate with the consulting teams working on the New Vaughan Official Plan and the Transportation Master Plan. The Official Plan Amendment for Kleinburg-Nashville will be incorporated into the New Official Plan when it is completed.

2. Scope and Focus of Study

The main focus of the Review are the lands designated "Rural Area" and the "Nashville Core Area", as identified on Map 1, within the Kleinburg-Nashville Community Plan Area - Official Plan Amendment No. 601, as amended. The scope of the study entails examining the Kleinburg-Nashville Community Plan and surrounding area. The Kleinburg-Nashville Community Plan Area is shown on Map 1.

3. Background/Context

3.1 Brief Overview of Kleinburg-Nashville's Heritage and Amenities

The settlement of Kleinburg dates back to approximately 1848. The Humber River Valley system and the source of energy it provided for the mills gave Kleinburg its start. The establishment of sawmills and gristmills attracted supporting trades and shopkeepers, and the village grew around it. The presence of the Kleinburg Railway Station, which supported commercial enterprises such as a grain elevator and lumber yard, contributed to the establishment of Nashville. The station was re-located in 1976 to Kleinburg, just north of the elementary school.

The history of Kleinburg-Nashville is evident through its significant buildings, sites, festivals and institutions, such as the McMichael Art Gallery (a major tourist draw), the Doctor's House, Klein House, Railway Station, and the Binder Twine Festival. The area offers significant natural and recreational resources, including the Humber River Valley System/conservations lands, nature trails, parks, and golf courses.

In 2003, the Kleinburg-Nashville Heritage Conservation District (KNHCD) Study and Plan was approved. The Plan, which includes Nashville, the Kleinburg Core and the adjacent valley system, provides guidance for: 1) the conservation of important historical, architectural, and landscape elements in the District, and; 2) the design of new development and redevelopment, to preserve and enhance the District's heritage character, which was defined further in the Kleinburg Core Area Policy Review described below.

The Nashville Core Area is located within the KNHCD. Although the rural lands on which the Review is partly focused are not located within the Heritage Conservation District boundary, the heritage designation plays an important role in understanding the planning context of the surrounding area within the Kleinburg-Nashville Community Plan. The KNHCD Plan requires new development to be integrated and compatible with the existing villages and to enhance the Heritage District. It is expected that a similar approach will be taken for developable lands within the Rural Area of the Focused Study Area through a set of land use and urban design policies that establish a development and open space framework.

3.2 Vaughan Official Plans

The Kleinburg-Nashville Community Plan and subsequent Amendments provide the existing local planning policy context of the area which are relevant to the Focused Area Review.

In 2001, OPA 601 was approved, which resulted in an update to the Kleinburg-Nashville Community Plan (OPA 160). The Plan was established to guide the development and redevelopment within the Plan area, which includes two villages, rich in cultural heritage and rural character, surrounded by rural/agricultural lands and traversed by the Main and East Humber River valleys. Currently, the Community Plan area is surrounded by a rural area to the north, east and west, and an urban residential community (Woodbridge Expansion Area) to the south.

A key goal of the Community Plan is to strike a balance between demand for growth and the need to continue to protect and enhance the character of the community. With regard to community boundary and growth, the Official Plan (4.2.2. 2)) states: "Any consideration of urban uses to the north, west or east of the community shall explicitly consider the implications on the Kleinburg-Nashville community in terms of the maintenance of its residential and village character, and the impacts of traffic, noise, and effect on community services." The Kleinburg-Nashville Community Plan Natural Environment Background Study and the environmental policies of the Official Plan are key components. The Focused Area Review is required to consider these matters.

In 2004, OPA 610 amended the Kleinburg-Nashville Community Plan (OPA 601) by providing policies for the environmental area that was identified and designated as the "Regional Road 27 Valley Corridor Study Area" between Rutherford Road and Nashville Road. The objectives of OPA 610 was to: provide a framework for the development of the natural trail system in the valley corridor; provide additional policies for the enhancement, restoration and acquisition of natural areas in the valley corridor; and, define where limited development potential is appropriate.

In 2006, OPA 633 (Kleinburg Core Area Policy Review) amended the Kleinburg-Nashville Community Plan (OPA 601) by incorporating: a new "Mainstreet Commercial" designation to the Kleinburg Core; new policies with respect to scale, massing, built form and permitted uses; revised policies for the permitted uses in the "Kleinburg Core"; recommendations and policies contained in the Heritage Conservation District Study and Plan; and, policies related to Cash-in-lieu of Parking within the "Mainstreet Commercial" designation. OPA 633 was approved by the Region of York in 2007, but was appealed and is currently before the Ontario Municipal Board. It is expected that a similar exercise at the Official Plan level be carried-out as part of the Focused Area Study for the Nashville Core Area.

3.3 Region of York Official Plans

In terms of Regional Structure, York Region's Official Plan (2004) identifies Kleinburg-Nashville as "Towns and Villages" for the built-up area and the remainder as "Agricultural Area", Rural Policy Area" and "Greenlands", which recognizes the Humber River Valley System. In 2001, Regional Official Plan Amendment 19 was approved, which designated approximately 1700 acres of land, located to the southwest of the Kleinburg-Nashville Community Plan, as "Urban Area" for employment use. South of the Community Plan is "Urban Area", consisting primarily of the residential expansion area of Woodbridge. To the north and east is the Rural Policy Area.

The Region of York is now engaged in a review of its Growth Management Plan, followed by the updating of its Official Plan based on the principles of sustainable development. In preparing the New Vaughan Official Plan and the Official Plans implementing the Focused Study Areas, it will be necessary to take into account the Region's growth management initiatives and its approach to sustainability. This will help to ensure that the Region's and City's environmental/sustainability programs are complimentary and supportive. For example, York Region's *New Communities Strategy* will result in the establishment of criteria for sustainable new community development. It is anticipated that once this initiative has been completed, together with a series of other initiatives that the Region is undertaking related to its Growth Management Plan, an Amendment to the Region's Official Plan will be introduced in the fall of 2008. The City is obliged to amend its Official Plan in conformity with the Provincial Policy and the Region of York Official Plan.

3.4 The Greenbelt Legislation

In 2005, the Province approved the Greenbelt Plan, which identified where urbanization should not occur within the Golden Horseshoe Area in order to provide permanent protection to the agricultural land base and the ecological features and functions on the landscape.

The Greenbelt Area does apply to certain lands, including portions of the Rural Area lands, within the Kleinburg-Nashville Community Plan. The approximate boundary of the Greenbelt lands, as it applies to the Community Plan Area, is shown on Map 1 attached. The greenbelt boundary, in relation to certain areas within the Community Plan, will mark the developments limits and plays an important role in determining what areas can or cannot be developed and how they will be designed.

Regional and local municipalities are required to bring their plans into conformity with the Greenbelt Plan. The Region of York is currently working on bringing their Official Plan into conformity with the Greenbelt Plan. The Region's Amendment must be approved by the Province before local amendments can take place. It is expected that the Regional Amendment will be introduced as part of a series of growth management amendments contemplated for the fall of 2008.

3.5 The Growth Plan

Approved in 2006, the Provincial "Growth Plan for the Greater Golden Horseshoe" establishes a policy framework for compact urban growth; sets intensification targets, directs growth to existing urban areas and transit corridors; limits Greenfield development; and promotes compact, transit-supportive development patterns. The Focused Area Review will be required to address the framework provided by the Growth Plan, including, but not limited to, the creation of a complete community and density targets.

A GTA West (Transportation) Corridor is identified in the Growth Plan as part of the policies for future provincial infrastructure to support growth. An Environmental Assessment Study is planned to examine the long-term transportation problems and opportunities to the year 2031 and consider alternative solutions to providing linkages between Urban Growth Centres in the GTA West Area (between Guelph and the Vaughan).

3.6 Other Initiatives

Additional initiatives planned for Kleinburg, which came out of the Kleinburg Core Area Policy Review Study, include: an Economic Development Strategy; a Streetscape Master Plan for the main streets in the Core; a Tree Inventory/Preservation By-law; a City-wide review of parking standards and cash-in-lieu, and; a review of the sign by-law.

In February 2007, Vaughan Council approved a detailed work plan and time-line for proceeding with the Consolidated Growth Management Strategy and its components, the Environmental Master Plan, other component Master Plans and a new Vaughan Official Plan. In May 2007, the Terms of Reference for the New Vaughan Official Plan was approved. The Plan will provide the

City with a comprehensive, contemporary policy framework to guide the City's future growth and to achieve sustainable community development to the year 2031. The lead consulting team (Urban Strategies Inc.) has commenced work on the project, which is expected for completion (Council adoption of the final Official Plan) by the fall 2010.

The Focused Area Review of the Kleinburg-Nashville Community Plan is one of four focused study areas to be undertaken. The Review will result in an Amendment to the Kleinburg-Nashville Community Plan that will be consistent with the principles, goals and objectives identified in the process leading to the New Vaughan Official Plan. The Review will also be informed by the Environmental Master Plan (the City's Sustainability Plan), which will provide an overall environmental ethic for the City and contain policies identifying how the City can move toward sustainability in all aspects of its operation. The Environmental Master Plan is scheduled for completion in the third quarter of 2008. The Amendment to the Kleinburg-Nashville Community Plan will be incorporated into the New Vaughan (City-wide) Official Plan.

Vaughan's "Active Together" Master Plan consists of two separate but related plans, being: the Parks, Recreation, Culture and Libraries Master Plan; and, a Sports and Physical Activity Strategy. The purpose of the former plan is to develop a strategy for meeting the current and future parks, recreation, culture and library facility and service needs of Vaughan to enhance the overall quality of life of its residents. The Sports and Physical Activity Strategy is intended to establish various strategies encouraging people to increase their level of fitness. The Master Plan is expected to be finalized in 2008. The Review will be responsive to and incorporate the recommendations made in the Active Together Master Plan.

In 2007, Region of York Official Plan Amendment No. 57 was approved, which amended the Regional Official Plan to extend lake based water supply to the community of Kleinburg-Nashville. The Amendment facilitates provision of additional water supply for approved and anticipated development in the Community Plan Area. Future growth is to be based on predominantly full municipal services. As a result of this Regional initiative, the City of Vaughan is currently undertaking a Servicing Strategy Master Plan Class Environmental Assessment to identify the water and waste water servicing needs for the Kleinburg-Nashville area. This will be completed by the end of 2008.

The City's Transportation Master Plan will evaluate in detail the local road network and identify the infrastructure that will be needed to efficiently accommodate the population and employment growth that will result from the implementation of the Growth Management Strategy. It will address both current and future transportation needs in an integrated and comprehensive fashion. Given the relationship between transportation and land use, the Transportation Master Plan study (to commence this Fall) will be undertaken as a component of the New Vaughan Official Plan Review and the Focused Areas Studies.

In 2007, the Region of York initiated a transportation study known as the Western Vaughan Arterial Road Improvements Environmental Assessment. The purpose of the study is to identify transportation deficiencies in Western Vaughan as a whole, develop alternatives to address the deficiencies and secure Environmental Assessment Act clearance for the preferred alternatives. The final Environmental Study Report is expected to be filed in 2010. One area of concern is the possibility of the need to relocate Major Mackenzie Drive as much as 300 metres north of its current alignment to enable an interchange with an extended Highway 427.

In 2006, the Ministry of Transportation initiated the 427 Transportation Corridor Environmental Assessment. The purpose of the study is to address existing and short-term transportation problems related to the existing Highway 427 terminus at Highway 7, truck traffic to and from the CPR Vaughan Intermodal facility and inter-regional traffic on Highway 7, 27 and 50. To date, the study team has identified the need to extend Highway 427 north of Regional Road 7, examined corridor alignment options (including the new terminus point for the highway) and has determined a preferred corridor option (to terminate at Major Mackenzie Drive) for further consultation. The next and final stages will be concluding consultation on the preferred alignment, preliminary

design, finalization of the Environmental Assessment document and Ministry of Environment approval. Detailed design, land acquisition and construction may begin in 2010.

All of these initiatives/studies will continue on their own merits and schedule. While they play an important role to inform the Review, the progress or schedule of any one such study should not deter the schedule and priority of this Review. This would also apply to the GTA West (Transportation) Corridor as described in Section 3.5.

4. Purpose of the Review

The purpose of the Review is twofold: 1) to establish an updated land use and urban design framework for the Kleinburg-Nashville Community Plan (OPA 601) with focused study on the lands designated "Rural Area" (as identified on Map 1) and the "Nashville Core Area" and; 2) to review the Community Plan for conformity with Provincial, Regional and City Plans.

5. Components of the Review

The major components of the review will include the following:

5.1 Background Review and Analysis:

This includes the review and consideration of existing Provincial, Regional and local policies and regulations applicable to the subject lands, including, but may not be limited to, the Provincial Growth Plan (*Places to Grow*) and Greenbelt Legislation, Highway 427 Corridor Extension Environmental Assessment, the Western Vaughan Arterial Road Improvements Environmental Assessment, Region of York Official Plan/Amendments, Kleinburg-Nashville Heritage Conservation District Plan, Kleinburg-Nashville Community Plan Natural Environment Background Study, Toronto and Region Conservation Authority Regulation(s) and the draft Terrestrial Natural Heritage Strategy, Vaughan's "Active Together" Master Plan, Kleinburg Official Plan/Amendments and zoning provisions. These documents will provide the regulatory basis/framework for the Study.

5.2 Issue Identification, Review and Analysis:

A review and analysis of existing conditions within and surrounding the Study Area and assembly of relevant information will be required, including but not limited to, existing land use, lot pattern, heritage resources, natural resources, community services, recent developments, community structure, and development applications for proposed development. The review and analysis of existing transportation networks, including roads/traffic and rail, as well as servicing will be required, which will be undertaken by the consultants working on the City's Transportation Master Plan and the Servicing Master Plan Class E.A. for Kleinburg-Nashville, respectively.

The assessment of existing conditions and relevant planning considerations, include:

- a) assess the existing parkland and open space and community services in the Study Area and surrounding lands and determine parkland, open space and community services requirements based on existing and proposed residential densities;
- b) determining any issues associated with lands adjacent to natural resource and greenbelt areas, such as defining the development limits and approach to development and determining availability of access and servicing; addressing City and TRCA environmental policy requirements;
- c) determining how to protect for the re-alignment of Major Mackenzie Drive and the Highway 427 Corridor Extension and appropriate land use(s) and relationships adjacent to the planned highway corridor;

- d) evaluating the ways in which more recent community development contributes positively or negatively to the area and identifying new approaches to development which is more sustainable generally, and land use and energy efficient, pedestrian friendly and transit-supportive more specifically;
- e) determining appropriate land use(s) and densities in consideration of Provincial and Regional policies, the broader context of the community and surrounding areas, population projections and related planning matters/constraints;
- f) addressing the notion of sustainability in every dimension of the new Plan to provide increased emphasis on the triple bottom line concept during implementation (Ecology – e.g. protection and restoration of habitat, water and energy conservation; Society – e.g. community design, including storm water design; and, Economy – e.g. economic spin-offs), which builds on the goals and policies of the Environmental Master Plan; emphasis on the creation of a healthy and inclusive community that supports new economic opportunities and a high quality of life with minimal impact on and potential to enhance the environment. Special consideration should be given to the following sustainability issues:
 - Natural systems and green space. The Kleinburg-Nashville area includes some of the highest quality, contiguous natural areas in the City of Vaughan. These are centred on the Humber River and connected to Greenbelt lands. The significance of these natural areas should be considered in an eco-regional context.
 - Energy conservation and climate protection. Reducing energy use in buildings and transportation is critical for greenhouse gas (GHG) reductions, while urban design and green space can mitigate climate change impacts.
 - Water conservation and water quality.
 - Pedestrian and cycling opportunities and transit-friendly design.
 - Continued improvements in waste reduction through Vaughan's three-stream waste reduction program.
- g) the impact on and the integration and connectivity with the existing and planned land uses within the surrounding area/community in terms of infrastructure, including GO/CP rail, traffic/roads, transit, trail system for pedestrians and bikes, the natural heritage system, cultural heritage, facilities, parks and community identity/character;
- h) determining the existing and future relationship between the Nashville Core Area and the surrounding area in order to provide an integrated and complete community;
- i) addressing the appropriate scale, massing, built form, permitted uses and development standards for the Nashville Core Area;
- j) undertake an examination of the heritage fabric and character of the Study Area and the KNHCD policies with a view to a possible update. This would include examining the integration and preservation of heritage fabric outside of the heritage district to ensure that any necessary heritage policies are developed and that future development is sensitive to and respectful of the heritage fabric and district;
- k) explore the land use and urban design implications of commuter transit opportunities.

5.3 Development of Planning Principles, Goals and Objectives:

These will be formulated in consideration of the prevailing Provincial, Regional and Municipal policies, the surrounding land use context and the issues identified in 5.2 above. The principles, goals and objectives will be consistent with the principles, goals and objectives identified in the process leading to the new Official Plan.

5.4 Preparation of Land Use/Development Alternatives and Urban Design Framework:

- The development and evaluation of a number of land use and development options/scenarios (at least three) for the Focused Areas (Rural Area and Nashville Core Area) and a set of urban design policies that establish a development and open space framework;

- Prepare a range of building typologies appropriate as infill or subdivision development for the area immediately adjacent to the heritage district.

5.5 Develop Evaluation Criteria:

This shall be developed based on the analysis of all the issues identified in the study process, and the planning principles and objectives, in order to evaluate and rank the land use alternatives/development options based on the evaluation criteria.

5.6 Recommendation of Preferred Land Use/Development Alternative and Urban Design Framework.

5.7 Recommendation of updated policies for permitted uses and development standards for the Nashville Core Area, that address scale, massing, built form, height, density, treatment of transition areas, etc.;

5.8 Prepare a Parks/Open Space and Public Realm/Streetscape Strategy:

The Strategy should include pedestrian/bicycle connections to the surrounding area, with special emphasis on providing attractive and convenient access to the Village Cores, valley lands and other green systems;

5.9 Recommendation of policies for permitted uses and development standards for the Rural Areas within the Community Plan (as identified on Map 1) that provide for integrated, connected, complete and sustainable communities in the future;

5.10 Prepare Secondary Plan/Official Plan Amendment for consideration of Council.

5.11 Include as part of the Official Plan Amendment, implementation policies, such as enabling a Community Improvement Plan, phasing, etc.

6.0 Consultation Program

Public consultation will play a key role in this Review in order to achieve a broad level of public acceptance for recommended policies and a land use plan(s). A variety of techniques should be used to convey an understanding of how the Focused Study Area will be developed, including a range of illustration techniques.

The consultant will design and be responsible for organizing a full consultation and engagement program, including community information and workshop meetings with residents, ratepayer groups, the business community, the development community, public agencies and other special interest groups. Staff anticipate that one or more Stakeholder Consultation Groups (SCG's) will be established to represent the various interests and provide ongoing input at key points in the

study process. A Technical Advisory Committee should be established (comprising City staff, external agencies and other stakeholders) and statutory public meeting(s) will be required for an Official Plan Amendment.

The consultation process should reflect the following meeting requirements:

- Working group meetings with the Core Team: Up to eight (8) meetings;
- Meetings with the City's Project Coordinator: As required;
- Presentations to Senior Management/Council/Official Plan Review Committee of Council: Up to eight (8) meetings;
- Public/Stakeholder Consultation Process: Up to four (4) meetings. The consultation process will involve and inform local residents, ratepayer groups, the business community, the development community, public agencies and other special interest groups, and will include meetings and presentations;
- Technical Advisory Committee meetings: Up to four (4) meetings;
- It is expected that the Consultant will also need to meet individually with City Councillors and the City Departments.

Details of the proposed consultation process will be provided in the submission of candidate consulting teams.

7. The Consulting Team

The Study requires the services of a multi-disciplinary consulting team to address a number of issues and shall demonstrate expertise in:

- a) Land Use Planning
- b) Urban Design
- c) Heritage Planning
- d) Environment
- e) Sustainable Development
- f) Public Consultation Facilitation

The City's Transportation Master Plan and the Servicing Master Plan Class Environmental Assessment for Kleinburg-Nashville will provide the transportation and servicing related analysis that is necessary for the successful completion of the Focused Area Review. The Review's consulting team will be required to be informed by these studies and collaborate with the consultants working on the transportation and servicing studies. Therefore, members of the consulting team will have, at minimum, a general knowledge and understanding of the issues and concepts related to transportation and servicing. The consulting team will also be required to be informed and collaborate with the City's Environmental Master Plan and the core team working on the New Vaughan Official Plan.

The consulting team will be led by a firm or consortium specializing in planning, with a demonstrated record in the formulation of Official Plan policy, large-scale land use and urban design plans, heritage planning, implementation and Community Plan review expertise. The lead firm will identify sub-consultants as part of the proposal and indicate the specific expertise offered to the Study and the extent of their involvement in the project. Should all required areas of expertise be provided within a single firm, sub-consultants may not be required. Consulting team members must have professional credentials in their given field of knowledge/expertise (e.g. CIP/OPPI, OAA, etc.)

The consulting team will carry out the project under the project management of the Policy Planning Department with the input and participation from the core consulting team for the New Vaughan Official Plan, Development Planning, Parks, and Engineering Departments, and other internal departments as required.

8. Schedule and Staffing

The Study is expected to begin in the Fall of 2008 and should be completed within 12 months.

The upset limit for this study is \$180,000 (including all disbursements and taxes). The successful consultant will be required to submit for approval of the Commissioner of Planning and the Director of Policy Planning, a work plan and payment schedule prior to commencing the project. The work program will detail task timing and sequencing and meeting schedules. The consultant's detailed prices should identify task costs, meeting costs, costs for disbursements, contingencies and applicable taxes, per diems of each member of the team, plus a payment schedule for each key stage or component of the Review. The proposal will also identify the role(s) and responsibility(ies) of each member of the consulting team, including assigned hours by task, their direct involvement and responsibilities in the Review, and their relevant experience.

9. Deliverables

a) Background and Final Reports

- Background report(s) shall be prepared on each of the following components:
 - i) Land Use and Sustainable Community Development Options, Urban Design framework
 - ii) State of the Environment and environmental policy requirements
 - iii) Housing and demographics
 - iv) analysis and draft Parks/Open Space and Streetscape/Public Realm Strategy
- Final report with recommendations

The background and final reports shall be submitted as follows:

- 50 cerlox bound copies of each;
- 1 unbound copy;
- 1 digital copy, in a format that can be edited.

b) The Draft Official Plan Amendment

The draft Official Plan Amendment document shall be submitted as follows:

- 50 cerlox bound copies;
- 1 unbound copy;
- 1CD/DVD (PDF) of the draft document and any related photos, graphics or maps in City-compatible software (Word, Power Point, Excel).

c) Final Official Plan Amendment

The final Official Plan Amendment document shall be submitted as follows:

- 50 cerlox bound copies;
- 1 unbound copy;
- 10 CD's/DVD's (PDF) of the final document and any related photos, graphics or maps in City-compatible software (Word, Power Point, Excel).

All illustrations contained within the above-referenced documents must be prepared in a way that effectively conveys the information when photocopied in black and white. Notwithstanding the above, the City may require documents or portions of documents to be in colour in order to convey the information more effectively.

All illustrations provided in presentations and documents must be of high quality and easy to read/legible. There shall be a variety of illustration types/techniques, approaches and levels of detail employed throughout the study process in presentations and documents (e.g. plans, sections, charts, perspectives, photographs, etc.) to effectively convey and promote the intended concepts.

Where appropriate, digital information shall be geo-referenced in accordance with City standards (NAD 83, 6 degrees UTM, Zone 17). Acceptable City formats include jpeg photos, AutoCAD dwg (2004 version), jpeg/bmp/tif/Adobe graphics. Specific technical information will be provided to the consultant.

d) Presentation Materials

Presentations shall be presented in PowerPoint format.

10. Content of Proposals

The consultant will be retained on the basis of a written proposal and, if necessary, interviews held by the Project Team or a sub-committee thereof. Selected Proponents may be short listed for interviews.

The written proposal shall contain the following information:

- Members of the consulting team including their qualifications and experience;
- Identification of the Consultant Team Leader;
- An explanation of the approach and methodology to be used and research to be undertaken to achieve the project's goals and objectives, as outlined in the Request for Proposal;
- A Council/staff/public/stakeholder consultation strategy;
- A comprehensive work plan/project schedule, including timelines, milestones, meeting and key dates, which fulfill the requirements of the Terms of Reference;
- An upset cost for the completion of the project, which includes a breakdown of the hourly rates attributable to each of the Consulting Team members and the and the hourly time commitment by task, for each of the participants; and all other costs and related disbursements;
- Documentation of related experience;
- A list of three (3) client references in respect of projects similar to the one described in the Terms of Reference, preferably in a municipal environment;
- In the proposal the consultant shall indicate the number and type of projects it is currently undertaking which may represent a professional conflict with the conduct of this study.

In addition to the Original, fifteen (15) bound copies of the Proposal, in an 8 ½" X 11" format plus one (1) unbound print ready copy shall be submitted. The maximum length of the Proposal shall be fifteen (15) pages, exclusive of resumes, references and documentation relating to project experience.

11. Evaluation Criteria

The Proposal will be evaluated on the basis of the following criteria:

Qualification and Experience: **35%**

- Capability of the Team Leader;
- Qualifications and expertise of the team members;
- Skills consistent with the needs of the project;
- Experience in similar studies;
- Level of public sector experience;

- Demonstrated success in public/stakeholder consultation; and the quality of the proposed consultation plan;
- Demonstrated skill in communicating project proposal and products, including excellent graphic presentation.

Quality of the Proposal: **30%**

- Complete and comprehensive submission;
- Demonstrated understanding of the project requirements;
- Organization and clarity of presentation;
- Introduction of innovative ideas and concepts;
- Skill in communicating the project plan.

Project Management: **25%**

- Work Program, timelines and scheduling consistent with study requirements;
- Degree of participation of senior staff;
- Ability to commit to the timing objectives for the completion of the study.

Financial Considerations: **10%**

- Proposal Fee;
- Appropriate allocation of resources to various phases or study tasks.

12. Negotiations

On completion of the evaluation process, vendor negotiations will be undertaken to refine the details of the contract for all portions of the proposed services described in this Request for Proposals. Negotiations may take the form of adding, deleting or modifying requirements.

Assuming mutually acceptable terms and conditions can be negotiated a contract will be signed with the selected proponent. In the event of default or failure to arrive at mutually acceptable terms and conditions, the City may accept another Proposal or seek new Proposals, or carry out this service in any other way deemed appropriate.

13. Best and Final Offers

Proponents are reminded that, since this is a Request for Proposal, a best and final offer may be requested, but this would be considered only with the short-listed proponents, if used at all. Proponents are encouraged to provide their best offer initially and shall not rely on oral presentations or best and final offers.

14. Disbursement of Fees

The successful Consultant will be required to submit a payment schedule prior to commencing the project. The payment schedule shall be subject to the approval of the Project Coordinator.

Invoices will be required to contain the following minimum information:

- Description and explanation of work undertaken in each invoice time period;
- Personnel employed and hours expended by the hourly rate;
- Disbursements;
- Total Fee for each invoice;
- Budget expended to-date and remaining budget.

The City shall retain a ten percent (10%) hold back on payment on all invoices until such time as the project is completed.

15. Conflict of Interest

In the proposal the Consultant shall indicate the number and type of projects it is currently undertaking which may represent a professional conflict with the conduct of this study. If the Evaluation Committee is of the opinion that a conflict exists, then the consultant will be disqualified from the competition. This matter may be discussed prior to the submission of the Proposal.