

TOWN OF MIDLAND



TERMS OF REFERENCE AND REQUEST FOR PROPOSALS

OFFICIAL PLAN REVIEW STUDY

MAY 2015

**Proposal Submission Deadline
Friday, June 12, 2015 12:00 pm**

Town of Midland
Planning and Building Services
575 Dominion Avenue
Midland, Ontario
L4R 1R2
705-526-4275 ext: 2216

TOWN OF MIDLAND

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SECTION A

GENERAL INFORMATION

1. Scope of Proposals

The Corporation of the Town of Midland invites proposals for an **Official Plan Review** Study respecting the Town's Official Plan in accordance with this Request for Proposals and the Terms of Reference provided in Section B of this document.

2. Terms of this Request for Proposals

The Terms of Reference for the Study are set out in Section B to this document. The requirements for the Proposal Submission are set out in Section C of this document. All three sections of this document comprise the REQUEST FOR PROPOSAL (RFP) for the **Official Plan Review** Study.

3. Questions and Clarifications

Proponents having questions and seeking clarification respecting the RFP shall do so in the following manner:

- a. Questions shall be submitted in writing by email to the Director of Planning and Building Services, Wesley R. Crown at wcrown@midland.ca
- b. Questions shall be submitted by 12:00 p.m. (noon) on **Monday, June 1, 2015**.
- c. Answers to all submitted questions will be posted on the Town's website on **Wednesday, June 3, 2015**.

TOWN OF MIDLAND

SECTION B

TERMS OF REFERENCE

**TERMS OF REFERENCE
OFFICIAL PLAN REVIEW STUDY
TOWN OF MIDLAND**

1. Purpose

The Town of Midland is seeking proposals from qualified consultants to carry out a phased exercise for the Town's Official Plan Review over approximately 18 months in 2015 and 2016. The study is proposed to conclude in December 2016 with the adoption of a new Official Plan for the Town of Midland.

2. Background

The Town of Midland is located on the picturesque shores of Georgian Bay on Lake Huron in Northern Simcoe County. The Town is a lower tier government and provides a full range of Municipal services to its residents including Police, Fire, Engineering Services, Library, cultural and recreation services and facilities, Midland Harbour and the Administrative Centre and staff in respect to the provision of these services. Midland has been identified as a Primary Urban Settlement in the Growth Plan for the Greater Golden Horseshoe and is anticipating continued growth and development over the coming years.

The Town's Official Plan was adopted on December 16th, 2002 and approved by the County of Simcoe on June 24th, 2003. As set out by Section 26 of the *Planning Act*, the Town is required to update and revise its Official Plan not less frequently than every five (5) years. The Town's Official Plan has not undergone a major review as required by the *Act* over the past 14 years.

The Town first commenced its mandatory Official Plan Review and Update Project (OPRUP) in 2008. Through the Fall of 2008 and Spring of 2009 the Town undertook its consultation process and produced a series of background reports (Growth Management Study, Plan and Policy Conformity Review, Natural Heritage Review, and Housekeeping Review) to guide the OPRUP. On June 4, 2009 the Province released the "Simcoe Area: A Strategic Vision for Growth" (SASV) document. A statement of the Province's intentions, the SASV indicated the steps that the Province would take to implement its growth vision for the Simcoe Area which included the County and its lower tier municipalities as well as the separated cities of Orillia and Barrie. Council, at its July 2009 Regular Meeting, determined that the Town should put on hold any further work on the OPRUP in light of the Provincial release of the SASV and the resultant uncertainty created in the planning system in the County of Simcoe. Staff was also directed to monitor the planning system at the Province and in the County as it may impact the Town's OPRUP.

In May of 2011 Council received Staff Report PL-2011-35 respecting a proposed re-start of the OPRUP as requested by Committee and an approach to the OPRUP that would "fit" the status and projected timing of the Growth Plan and County Official Plan OMB processes. The concept for the 2011 restart of the OPRUP review was based on a series of sequential, multi-year, thematic reviews and resultant Official Plan Amendments (OPA) that would follow one after another and would address the full range of policy issues and matters that were previously identified in the background studies for the OPRUP. This sequential work plan concept would have permitted Council to start work on the OPRUP and not delay the update until after Growth Plan Amendment 1 (GPA1) was approved or the new County Official Plan was approved by the OMB. Council commenced the 2011 OPRUP in the Summer and early Fall of 2011 with the "Refining the Vision for the Town of Midland Official Plan". In late 2011, with the continued

uncertainty over the OMB process for the County Official Plan, Council again determined to put the OPRUP on hold.

The Town's Official Plan Review (OPR) is now scheduled for 2015 and 2016. The County Official Plan is presently before the Board for approval. Through a series of phased approvals, the issues identified by the various parties are being addressed. Most of the Town's identified issues have been resolved through Minutes of Settlement and revisions to the County Official Plan. It is anticipated that the majority of the Simcoe County Official Plan will be approved by the Board, save and except for some site specific properties and issues not located in Midland, prior to the completion of the OPR in December 2016.

3. Study Area

The study area includes all the lands within the jurisdiction of the Town of Midland. The OPR must also consider the location and context of the Town within the north Simcoe area, within the County of Simcoe, and the broader, regional context.

4. Scope of Work

The Official Plan Review Study is intended to occur over 2015 and 2016. Provided below in Table 1 is a summary of the proposed phasing and timelines for the OPR Study project. The schedule matches the Council approval to include the Budget for the project in the 2015 and 2016 Budgets.

Table 1 – Phasing and Timelines

Phase		Timeline
ONE	Getting Started	April 2015 – June 2015
TWO	Consultation/Visioning	September – December 2015
THREE	Background Studies and Discussion Papers	June 2015 – April 2016
FOUR	Directions and Recommendations	May 2016 – June 2016
FIVE	Draft Official Plan	July 2016 – September 2016
SIX	Final Official Plan	October 2016 – December 2016

The following description of each proposed phase of the OPR study is intended to provide an overview of the process and describes, in a general way, the outcomes and deliverables for each phase of the project.

PHASE ONE – GETTING STARTED April – June 2015

Planning Staff will complete the following steps to initiate the OPR process:

- Schedule the Statutory Public Meeting to consider the revisions to the Official Plan as per the *Planning Act*.
- Internal circulation to identify preliminary issues.
- Prepare the draft Terms of Reference and Work Program for the OPR.
- Set up internal governance approach for OPR (this report).
- Prepare RFP for Consulting Services.
- Retain Project Consultants.

PHASE TWO – CONSULTATION/VISIONING September-December 2015

Community engagement in the OPR will be critical to the success of the Project. Community consultation and participation is an essential component of the work program and opportunities for engagement and participation in the process will be required during each phase of the OPR. Moreover, Section 8.7 Public Involvement and Consultation the Town's current Official Plan recognizes that Community consultation and engagement is an "essential component of community building and the local planning review and decision making process". In addition, the Official Plan requires the development of a Public Consultation Plan as part of a comprehensive review and update to the Plan.

The consultants, selected in Phase One, will be required to prepare a Public Consultation Plan to describe how they will engage the Community through the entire course of the work program for the OPR. The Public Consultation Plan must include:

- the methods and types of notice, including social media
- the number and purpose of the consultation meetings including workshops, round tables and statutory public meetings
- how the Town's "duty to consult" will be undertaken in respect of the Georgian Bay Council of the Metis Nation of Ontario, Beausoleil First Nation, Ouendat First Nation and other First Nations.
- how comments will be addressed and responded to; specifically including where changes in land use designation are proposed and how those owners will be notified and consulted.
- the number, timing and purpose of consultation meetings with the County of Simcoe Planning Department throughout the various phases of the study. The County of Simcoe is the approval authority for the Town of Midland Official Plan.

The project consultants will also be required to undertake a Community Visioning exercise at the outset of the OPR. The intent of the visioning exercise is to establish a Community vision, goals and principles for the new Official Plan based on Community input. The vision, goals and principles will guide the development of the Official Plan and will guide the growth, development and change of the Town over the next 20 years. The deliverable will be a Vision Statement, guiding principles, goals and policy objectives to form and inform the framework for the new Official Plan. The final format for the visioning exercise will be determined based on the recommendations of the selected consultant and as outlined in the Public Consultation Plan.

PHASE THREE – BACKGROUND STUDIES AND DISCUSSION PAPERS June 2015–April 2016

Official Plans are large, complex and comprehensive documents that cover a wide range of issues and themes impacting the operation, growth and development of the Town. As a result, the amount of information that needs to be presented to the Public and to Council is considerable and the best way to present both the new and existing work is through a series of background studies and discussion papers. The themed discussion papers will form the basis for public consultation.

It should be noted that a number of foundational studies have or will be completed by the Town that must be incorporated into the OPR through the discussion papers. The Town completed its Transportation Master Plan in 2012, Employment and Commercial Lands Strategy Update in 2012, Water Master Plan in 2013, Cultural Plan in 2014, Development Charge Background Study in 2014, Asset

Management Plan in 2014, and the Downtown Master Plan will be completed in mid-2015. The Town has also been involved in a number of area wide studies and/or plans. The Severn Sound Sustainability Plan 2009, HEA Economic Development Strategic Action Plan 2013 and Huronia Area Tourism Strategy 2013 must all be considered for input to the OPR.

The following studies and discussion papers will be completed by the Project Consultants in Phase Three of the OPR:

- Growth Management & Municipal Comprehensive Review Study and Discussion Paper – the purpose of this report is to address the growth management components of the Growth Plan and County Official Plan and the growth targets in both. Included will be an intensification review to determine appropriate intensification locations and policies to satisfy the intensification targets in the Growth Plan. The Study will also look at employment land forecasts and commercial land-needs based on the 2012 Study and to develop a comprehensive strategy for protecting employment lands. Issues and options for the new OP will be identified in the discussion paper.
- Natural Heritage Study and Discussion Paper – the purpose of this Study will be to provide a review and analysis of the natural heritage features and functions in the Town based on the 2014 PPS and allow for the identification and protection of a natural heritage framework. Approaches for the OP in respect of the natural heritage system implementation will be the subject of the Discussion Paper.
- Infrastructure Discussion Paper – this discussion paper will review the relevant background studies noted above and identify issues and options for policies that should be considered in the OPR respecting water, wastewater, stormwater, roads, and active transportation matters.
- Living Areas Discussion Paper – This discussion paper will address the full range of “living areas” issues including the intensification opportunities, affordable housing issues, and the full range of housing and living area policy matters required by the PPS, Growth Plan, and County Official Plan.
- General Policy Discussion Paper - This Discussion Paper would deal with the proposed format and structure of the new Official Plan and would also address the complete range of general development, amenity and design, heritage, culture and implementation and administrative policies typically included in an official plan document.

PHASE FOUR - DIRECTIONS AND RECOMMENDATIONS May–June 2016

Phase Four of the OPR Study project will include an extensive consultation process on the Discussion Papers produced in Phase Three of the process and will result in a Directions and Recommendations Report from the Project Consultant. The Directions and Recommendations Report will provide consolidated and integrated recommendations on the various policy matters identified in the Discussion Papers and directions on the drafting of the new Official Plan. The consultation could include a range of approaches including on-line, social media, and the use of more traditional workshops and open houses.

The final format for the consultation approaches for Phase Four will be determined based on the recommendations of the selected consultants and as outlined in a Public Consultation Plan.

PHASE FIVE – DRAFT OFFICIAL PLAN July-September 2016

Phase Five will include preparing the draft Official Plan for circulation to all Departments, agencies, stakeholders and Committee for review and for holding the statutory Public Open House under the *Planning Act*. The Open House will include a presentation of the draft Official Plan and an opportunity for the Community to provide comments and suggestions for consideration by Committee and Council.

PHASE SIX – FINAL OFFICIAL PLAN October-December 2016

Phase Six will include preparing the final draft of the Town of Midland Official Plan based on the review and comments received during Phase Five of the OPR Project. The final draft of the Official Plan will be presented at the statutory Public Meeting under the *Planning Act* and subject to any final refinements; the Official Plan will be prepared for Council adoption. Once adopted by Council, the new Official Plan will be submitted to the County of Simcoe for approval in accordance with the provisions and regulations under the *Planning Act*.

5. Consultation and Meeting Requirements

The Downtown Master Plan Study will be guided by a Steering Committee comprised of Municipal Council representatives, residents of the Town and supporting Municipal staff from the Planning and Building Services Department, Engineering Department, Operations Department, and the Clerk’s Department. The project consultation will be managed by the Town’s Planning and Building Services Department. Regular communication with the Steering Committee is a requirement of the Study.

The proposal must contain the consultant’s recommendations for public consultation as part of the Study. As noted above, the selected consultant will be required to prepare a Public Consultation Plan to set out how they will engage the Community through the entire course of the work program for the OPR. Creative and innovative approaches to engage the Community are highly sought.

At a minimum, the proposal shall include a description of the number and type of meetings and consultation opportunities proposed:

- a. Meetings with the Steering Committee and purpose and proposed outcomes of each.
- b. Community consultation meetings by number, type and proposed outcomes.
- c. Statutory Meetings with Council. The statutory meeting required under Section 26 of the *Planning Act* was held on April 1, 2015.

6. Available Information

The Town will provide:

- Existing Official Plan (MS Word format)
- Previous OPRUP draft reports and all staff reports respecting OPR (PDF format)
- Results of Section 26 meeting
- Transportation Master Plan 2012 (PDF format)
- Employment and Commercial Lands Strategy Update 2012 (PDF format)
- Water Master Plan 2013 (PDF format)
- Cultural Plan 2014 (PDF format)

- Development Charge Background Study 2014 (PDF format)
- Asset Management Plan 2014 (PDF format)
- Downtown Master Plan (to be completed in mid-2015) (PDF format)
- GIS data as required
- GIS data respecting natural Heritage features and functions may be purchased directly from the SSEA.

7. Work Plan

The proposal must provide a work plan indicating the timing for conducting each of the six phases of the Official Plan Review Study, the approximate timing for the various tasks included, the cost of each of the phases broken down by task and the date of final submission to the Municipality.

8. Project Budget

The overall project budget has been set at a maximum upset limit of \$100,000, taxes included. The OPR Study Project has been budgeted over two years (2015 and 2016) and has a project budget of approximately \$30,000 for 2015, with the balance of the project budget set for 2016.

9. Deliverables

The selected consultant will be required to provide the following to the Town during and at the conclusion of the study:

- A. Fifteen (15) bound hard copies of all draft and final reports and fifteen bound (15) copies of the final Town of Midland Official Plan for adoption.
- b. One (1) electronic PDF version of all draft and final reports on appropriate media (CD or DVD) or via email.
- c. One (1) electronic MS Word version of all draft and final reports and of the final Official Plan on appropriate media (CD or DVD).
- d. One (1) electronic copy in PDF, JPEG or TIFF or compatible version formats of all plans, illustrations and and/or drawings produced during the Study.
- e) One (1) electronic copy in ArcMap or compatible format of all schedules to the Official Plan.

TOWN OF MIDLAND

SECTION C

PROPOSAL SUBMISSION REQUIREMENTS

THE CORPORATION OF THE TOWN OF MIDLAND

PROPOSAL SUBMISSION REQUIREMENTS

1. **Required Proposal Format**

The Terms of Reference contains several sections all of which need to be addressed for your proposal to be considered. Please double check your finished document to ensure that you have included 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 your submission:

- a. Proposals should be submitted electronically only in PDF format including a letter of submission signed by an authorized representative of the Consultant as set out below.
- b. Proposals shall be less than 10 MB in size and shall be less than 40 pages in total length. Proposals shall generally be limited to standard letter format (21.59 cm x 27.94 cm). Cost Estimates and Work Plan/Timing may be in larger formats. **Proposals larger than 10 MB or longer than 40 pages in length will not be accepted.**
- c. Proposals must outline the cost of conducting the study listed in the Terms of Reference both as a total price, total plus HST and cost per task format.
- d. The proposal shall include a Work Plan for the study and the projected and expected time frame for the Study.
- e. The Proposal will include a summary of the Consultant's professional information and history and relevant experience shall be included.
- f. A summary of past projects which will demonstrate the Consultant's experience in the Study tasks as outlined in the terms of reference shall be included in the Proposal.
- g. Proposals must be submitted with a minimum of three references listed for contact respecting recent and relevant projects.

2. **Evaluation Process**

An "OPR Study RFP Review and Consultant Selection" Ad-Hoc Committee has been formed to undertake the review of the submitted proposals and to make appropriate recommendations to Council. The Chair and Vice Chair of the Planning and Development Committee of Council, CAO, Director of Planning and Building Services, Director of Operations, Town Engineer, Planner and Mayor (ex-officio) comprise the Ad-Hoc Committee.

The selection of a Consultant is a competitive process and therefore the Town reserves the rights to accept or reject in whole or in part any or all proposals and cancel all or part of this RFP process for any reason at the sole discretion of the Town and to negotiate contracts with the selected Consultant whose proposal is considered to be most acceptable to the Town.

3. **Evaluation Criteria**

The Consultant Selection Committee will make its recommendation based on the following evaluation criteria:

- The degree to which the proposal responded to the RFP and Terms of Reference.
- The demonstration of relevant experience in similar studies and the professional reputation of the consultants.
- The demonstration of creative approaches to community consultation and study process.
- The demonstrated ability of the consultant to provide the services defined in this RFP.
- The total cost.
- The overall project timing.

4. Interviews

Consultants may be asked to attend an interview with the Selection Committee prior to final consideration by Council.

5. Assumptions and Contract

The selected Consultant will be expected to enter into a Contract with the Town 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 Town’s Occupational Health and Safety requirements.

The selected Consultant will indemnify the Town from all costs, charges, 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.
- Automobile Liability Insurance.
- WSIB Clearances (if required).
- Any other labour requirements of the Province.

6. Contract Award

The final authority to award the Study rests solely with the Council of the Town of Midland. Consultants are advised that the lowest cost proposal will not necessarily be awarded the contract as the selection will be based on the evaluation criteria and cost is only one of the criteria. The Town will not be responsible for any preparation costs incurred by the Consultant submitting a proposal and will not pay for any travel expenses to participate in interviews or contract negotiations.

7. Submission of Proposals

Proposals should be submitted electronically in PDF format only including a letter of submission signed by an authorized representative of the Consultant, to:

planning@midland.ca

Subject: OFFICIAL PLAN REVIEW STUDY PROPOSAL

The Town will not accept proposals in any other format. It is the responsibility of the Consultants to ensure that the proposal has been received and that 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.

8. Submission Deadline

Proposals must be received by **12:00 p.m. (noon) on Friday, June 12, 2015**. Proposals received after this date and time will not be considered.