



Township of South Frontenac

REQUEST FOR PROPOSAL
RFP# 2019-P01

DEVELOPMENT CHARGES STUDY

Issued on: January 2, 2019

1. Background Information

The Township of South Frontenac (*"The Township"*) is a rural lower tier municipality located in Eastern Ontario north of the City of Kingston. The total population of the Township is approximately 18,646 with 10,425 households.

Major infrastructure in the Township consists of the following:

- Municipal Roads (paved and unpaved)
- Bridge & Culverts
- Water distribution systems, fire hydrants, water meters, storm sewers and elevated storage tanks
- Facilities including: recreation centers, libraries, park pavilions, administration centre and fire stations
- Land Improvements including: baseball diamonds, sports parks, parks, beaches, boat launches and playground equipment
- Vehicles, Machinery & Equipment

In addition to the infrastructure which the Township is responsible for acquiring, maintaining, and rehabilitating, there are a number of services the Township provides to its residents which include, but are not limited to:

- Fire & Emergency Services
- Recreation, Parks and Facilities
- Solid Waste management including recycling, landfills and household hazardous waste
- By-law Enforcement
- Licenses and Permits
- Development Services including Planning and Building Permits and Inspection

Township Council is made up of 9 members including the Mayor and Deputy Mayor.

2. Intent of the Proposal

The Corporation of the Township of South Frontenac is inviting proposals from respondents for the provision of professional services for a Development Charges Study, preparation of the Development Charges By-Law and Local Services Policy.

On September 2, 2014 the Township passed Bylaw 2014-54, being a bylaw to implement Development Charges pursuant to the *Development Charges Act, 1997*. Pursuant to the *Development Charges Act*, this bylaw will expire in September 2nd, 2019.

The Township is looking for a qualified consultant to undertake a Development Charges Study that includes:

- Preparing an updated Development Charge Background Study to meet the requirements set out in the *Development Charges Act, 1997, Chapter 27* that includes any optional approaches that might be considered for meeting the requirements and maximizing the Municipality's opportunities under the Development Charges Act.
- Calculating an updated Development Charge Rate Schedule based on the information contained in the Development Charges Background Study
- Preparing a revised Development Charge By-Law and associated Rate Schedule
- Defending the Development Charge background study, by-law, and/or rate schedule if required before the Local Planning Appeal Tribunal (LPAT)

3. Proposal Structure and Content Requirements

3.1 Proposal Submission Structure

The proposal document should be structured in sections that refer to the headings addressed in the Proposal Content Requirements of this section and should be numbered and tabbed accordingly.

3.2 Proposal Content Requirements

3.2.1 Company Profile

Proponents are to provide company information such as, but not limited to the following:

- a) Provide a general company profile including the ownership and affiliations of the firm and number of years the firm has been in business
- b) Address and contact information for the proposed entity; and
- c) Size of company and office locations

3.2.2 Qualifications and Experience

Provide a brief resume of the project manager and support staff that would be directly involved in the project. Evaluation of the project manager and support staff will include an assessment of the firm's overall ability to provide adequate resources to the project.

Proponents shall include a description of at least three (3) previous engagements with other similar sized government entities to the Township, that outline projects of similar scope, cost and magnitude that have been successfully completed in the past two (2) years. This shall include client names, contact and contact phone numbers

3.2.3 Project Understanding and Approach

The Background Study resulting from the development charges review process shall be a document containing an executive summary, study findings related to growth and projected development, development charges policy recommendations, development charges calculations methodology, together with a draft Bylaw and draft local services policy. The Background Study shall meet all requirements of the *Development Charges Act*, as amended, and related Regulations.

This background study will also be used to support a future Growth Management Study for the Township, anticipated to begin in mid-2019. The population projections through the Development Charges Study and the Growth Management Study will be used to support the development of a new Official Plan for the Township of South Frontenac.

Describe your firm's ability and experience to also provide services to prepare a Growth Management Study. Although this will be a separate process, the Township feels continuity in having the same consultant do both studies is an important factor in awarding this proposal.

At a minimum, the background study must include detailed sections on the following topics:

- Levels of Service
- Allowable Charges analysis/calculation
- Anticipated growth and development
- Capital Forecast (10 year and longer term initiatives)
- Service Area Options analysis
- Proposed Development Charge recommendations

The Development Charges Background Study must also address the following components:

- 1) Review current and long term population and growth analysis and if necessary, undertake an update of this analysis and other primary statistical and data elements.
- 2) Evaluate options for development charges based on geographic service areas; developing an appropriate methodology for calculating levels of service and allowable charges for services eligible for development charges funding.
- 3) Determine the extent where service areas can be broken out.
- 4) Evaluate various Service Area options including calculating appropriate development charges rates for each potential Service Area.
- 5) Complete a cash-flow analysis based on revenues and expenditures to ensure anticipated development charges revenue will provide for necessary expenditures.
- 6) Calculate incremental operating costs related to growth expenditures.
- 7) Assist the Township in considering new services to be included in the Bylaw.
- 8) Provide advice with respect to various development charges related issues.
- 9) Ensure the study meets all the requirements of the *Development Charges Act*, as amended, and related Regulations.

3.2.4 Schedule of work

Proponents shall indicate when work would commence (pending notification of award by February 5, 2019, should you be the successful proponent) and upon execution of contract, the background study shall be completed by no later than May 31, 2019. Meeting dates, other key events and major project deliverables should be clearly identified on the project schedule. It is the Township's intent to aim to put the by-law before Council for consideration by August 6, 2019.

3.2.5 Budget

The Proponent's submission shall include:

- Overall project cost exclusive of HST.
- A detailed cost and time breakdown of each major activity identified in the proposal.
- A time and cost breakdown for each team member.
- Identifying any disbursements and the associated costs.
- A fee schedule and hourly rates for all project team members.

Proponents shall indicate a breakdown of costs as provided for on the Appendix A: Schedule of Fees, inclusive of all costs associated with providing services.

3.2.6 Validity

Proposals shall be irrevocable and open for acceptance by the Township at any time within ninety (90) days from the closing date.

3.2.7 Other Considerations

Please include any other items, not covered in the previous sections, which will identify why your firm should be selected by the Township. Information should be included in the proposal regarding any advisory services (e.g. be available to answer general staff questions about ability to utilize development charges to fund certain projects) that would be available to the Township on an on-going basis while the bylaw is in effect (2019-2023).

Section 4: Proposal Process

4.1 Timeline

The following timeline has been established for the Proposal selection process:

Request for Proposals Issued	Wednesday, January 2, 2019
Proponent questions received until	Wednesday, January 9, 2019
Township to provide answers by	Monday, January 14, 2019
Receive Proposals	3 p.m. Thursday, January 17, 2019
Invitation to Interview	Friday, January 18, 2019
Interviews, if necessary	Thursday, January 24, 2019
Contract Award	Tuesday, February 5, 2019

4.2 Date & Place for Receiving Proposals

- a) Proposals will be received by 3:00 p.m. local time on Thursday, January 17, 2019

FAX OR EMAIL COPIES WILL NOT BE ACCEPTED.

It is the responsibility of the proponent to ensure that the documents have been received before the closing time and date.

Proposals received after 3:00 p.m., local time on Thursday, January 17, 2019 will be returned unopened.

- b) Proposals must be addressed to:

**Township of South Frontenac
4432 George Street
Sydenham, ON
K0H 2T0
Attention: Wayne Orr, CAO**

and clearly marked: **Request for Proposal – Development Charges Study**

- c) Before being officially received, the proposal envelope will be marked by the Township, with the time and the date that the envelope was received in the office.
- d) All proposal submissions are appreciated. However, the Township will be contacting only those selected for an interview.

4.3 Documentation

- a) One original and 2 copies of the proposal are required.
- b) All proposals must be legible and typewritten.

4.4 Interview

An interview may be necessary as part of the evaluation process. Proponents may be contacted to attend an interview on Thursday, January 24, 2019 and will be notified by Friday, January 18, 2019

4.5 Negotiations

In the event that a prepared proposal does not precisely and entirely meet the requirements of the Township, the Township reserves the right to enter into negotiations with the selected Proponent(s) to arrive at a mutually satisfactory arrangement with respect to any modifications to a proposal.

4.6 Communications

All requests for information and/or clarification as well as questions regarding the interpretation of the terms set out in this document should be referred to Claire Dodds, Director of Development Services at cdodds@southfrontenac.net.

Addendums will be uploaded to the website. It is the proponent's responsibility to inquire on the website for addendums.

The Township reserves the right to distribute any or all questions and answers to the other proponents.

4.7 Withdrawal or Substitution of Submission

A proponent may withdraw or substitute all or part of his/her proposal at any time up to the official closing time. The last proposal received shall supercede and invalidate all proposals previously submitted by that proponent for this proposal.

A proponent may withdraw or qualify his/her proposal at any time up to the official closing time, by submitting a letter bearing the signature as in his/her proposal to the Clerk, who will mark thereon the time and date of receipt and will place the letter in the tender box.

4.8 Alterations or Variations

No alterations or variations of this document shall be valid or binding upon the Township unless authorized in writing in accordance with the procedure set out in Communications 4.6.

4.9 Oral Explanation or Interpretation

No oral explanation or interpretation shall modify any of the documents or provisions of the Township's request for proposal documents.

5. Proposal Evaluation

5.1 Qualification evaluations will be carried out based on the following criteria:

1	Qualification and Experience (3.2.2)	20
2	Project Understanding and Approach (3.2.3)	25
3	Schedule of Work (3.2.4)	10
4	References	10
5	Budget	25
6	Interview	10
	Total	100

The submissions will be assessed on the merits of the information provided. Proposals should address the categories listed above to enable the Review Committee to undertake adequate assessment.

LOWEST BID OR ANY PROPOSAL NOT NECESSARILY ACCEPTED

5.2 Review Committee

The review committee will be comprised of Township staff.

5.3 Acceptance of this Proposal and Contract

It is expected that one proponent will be selected to conduct this project. Upon selection, the successful proponent will be required to enter into a contract with the Township.

The contract will be based on the specifications, terms and conditions expressed in this document, the successful proponent's proposal and documented negotiations and will include the requirement of proof of professional liability insurance.

5.4 Incurred Costs

The Township shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Proponent(s) prior or subsequent to or by reason of the acceptance or non-acceptance by the Township of any proposal by reason of any delay in the acceptance of a proposal.

5.5 Errors and Omissions

The Township shall not be held liable for any errors or omissions in any part of this RFP. While the Township has used considerable effort to ensure an accurate representation of information in this RFP, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Township, nor is it necessarily comprehensive or exhaustive.

5.6 Cancellation

The Township reserves the right to cancel this Request for Proposals at any time up to the Award of a Contract.

5.7 Confidentiality

The successful proponent shall not at any time before, during or after the completion of the engagement, divulge any confidential information communicated to or acquired by the proponent in the course of carrying out the engagement. No such information shall be used on any other project without prior written approval.

5.8 Invoicing and Payment

All invoices shall show the actual hours, responsibilities, staff and hourly rates. All payments will be made in response to invoices itemized in accordance with the final signed contract, provided the invoices are based on work described in the scope of the project, consistent with the negotiated deliverables and completed to the Township's satisfaction.

For further certainty, in the event that invoices are rendered that are in excess of the fees quoted in the final signed contract, payment will not be made unless the additional deliverables have been negotiated with and accepted by the relevant entity in advance of the conduct of the work.

Appendix A: Schedule of Fees

Complete the cost summary chart below by breaking down costs, before HST in Canadian Dollars (CAD). Proponents must complete this form and include with the Proposal Submission.

2019-P01 DEVELOPMENT CHARGES STUDY

Description	Cost
Proposed Total Fee (inclusive of all costs except for HST) to complete all tasks noted in RFP 2019-P01	\$
SUB TOTAL	\$
HST	\$
TOTAL	\$

The quoted price shall be an upset limit to include all labour, materials, travel, accommodation, meals, long distance charges and incidental expenses incurred by the successful respondent in the provision of all services as specified herein.

The Township of South Frontenac may award one, some or all parts of any option.

Proponent's Name: _____

Proponent's Signature: _____

Date: _____