



**REQUEST FOR PROPOSAL FOR CONSULTING
SERVICES
T-2024-31
COMPREHENSIVE ZONING BY-LAW UPDATE**

Closing Date: April 22nd 2024

Time: 2:00 pm

**Contact:
Mr. Bryce Sharpe
Manager of Planning
705-765-3156 Ext. 235
Planning@muskokalakes.ca**

Township of Muskoka Lakes
1 Bailey St
P.O. Box 129
Port Carling, ON
P0B 1J0

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SECTION 1: INSTRUCTIONS, TERMS, AND CONDITIONS

1 DESCRIPTION OF UNDERTAKING

Firms with an interest in this project must follow the details of this document closely when responding to this request.

The information provided in this document is intended to provide a general overview of the work required.

2 INVITATION

The Municipality is seeking proposals from suitably qualified consulting firms (“Consultants”) to provide professional services to prepare an update to the February 2023 consolidation of the **Township’s Comprehensive Zoning By-law (By-law 2014-14, as amended)**.

3 SUBMISSION DEADLINE

Proposals must be received **NO LATER THAN 2:00 p.m. Local Time on April 22nd, 2024**.

Any proposal received after the above due date and time will not be considered and will be returned unopened to the Consultant. Consultants are to submit their proposal in a sealed package, or electronically, clearly identified as to contents and addressed to:

The Township of Muskoka Lakes PO Box 129, 1 Bailey St
Port Carling ON.
POB 1J0

Attn: **Bryce Sharpe, Manager of Planning**

Fax or electronic submissions will be accepted at the bidder’s sole risk.

Fax #: (705) 765-6755

Or

Planning@muskokalakes.ca

4 PROPOSAL SUBMISSION:

The bid shall include items listed hereunder.

Bids shall be submitted in envelopes with the information outlined in Attachment “E” - Envelope Submission Information, clearly marked on the front of each envelope, as follows:

ENVELOPE 1 – Bid including all items listed below under section **PROPOSAL** (including addenda, if applicable).

ENVELOPE 2 – Bid Summary of Professional Fees and Disbursements, **PROFESSIONAL FEES** (see Attachment “B” – Fee Schedule and Cost Breakdown).

Fax and email submissions should submit each document separately.

5 WITHDRAWAL OF PROPOSAL

A Consultant may withdraw a submitted proposal at any time up to the official closing time by letter bearing a signature and/or seal as in the original proposal and requesting that their proposal be withdrawn. Withdrawal requests received after the time of closing will not be permitted.

6 COSTS FOR RFP DOCUMENTS

The Request for Proposal (“RFP”) documents are provided at no cost to the Consultants.

7 RETRIEVAL OF OFFICIAL DOCUMENTATION

Only documents provided to Consultants by the Municipality or found on the Municipality’s website are to be considered the "official" documents. The Municipality accepts no responsibility for the accuracy of information found on other websites.

8 FORMAT OF PROPOSAL

All proposals must be submitted upon the forms provided and the respondents information called for in this RFP, submitted on 8½ x 11 paper in sealed packages, clearly marked as to contents and should include one (1) bound original and one electronic copy (on USB key) of the complete submission and shall include (at a minimum):

- 1. Proposal Form**
- 2. Respondent Information Form**

9 SUMMARY OF KEY DATES

Cut off for submission of questions	April 2nd, 2024
Response to questions	April 10th, 2024
Submission of proposal	April 22nd, 2024
Anticipated award of assignment	May 17th, 2024

10 COSTS INCURRED BY PROPONENTS

All expenses incurred in the preparation and submission of proposals shall be borne by the Consultant. No reimbursement of costs to prepare the proposal shall be provided to the proponents.

11 ACCEPTANCE AND TERMS

This RFP is not a tender and is not intended to create a contract. The Consultant and all other entities participating in this RFP Process agree that submission of a proposal constitutes acknowledgement that the Consultant has read and agrees to be bound by all the terms and conditions of the RFP.

12 NO CONTRACT CREATED BY THIS RFP

This document is a request for proposals in respect of the services and project described herein and is not a tender. Neither the RFP Documents nor the submission of any proposals in response to the RFP documents shall, in any way whatsoever, create a binding agreement between the Municipality and any Consultant.

13 RIGHT TO REJECT OR NOT OPEN

Notwithstanding any other provision of this RFP, the Municipality may, in its sole and absolute discretion, accept or reject any part or all proposals.

14 CONSULTANT SELECTION COMMITTEE

If deemed appropriate, a Consultant Selection Committee may be formed by the Township to evaluate the proposal. The Consultant Selection Committee will consist of representatives of the Municipality.

15 CONSULTANTS TO INVESTIGATE

Consultants submitting a proposal shall understand and acknowledge that while this RFP outlines the scope of work and specific requirements, the Consultants shall satisfy themselves by such means as they prefer, as to the extent of work required to complete the assignment.

16 NEGOTIATIONS:

If all submitted bids are over budget, the Township reserves the right to negotiate the terms of the project contract, including price and scope of work, directly with the qualified bidder, to identify cost saving opportunities associated with alternate process, material or construction methods.

17 COMPLIANCE:

Any deviations from the Township's RFP document must be clearly defined and are subject to acceptance or rejection by the Township in its sole discretion.

18 COMPLIANCE WITH SPECIFICATIONS AND/OR SCOPE OF WORK:

Alternative bids may be considered however, any deviations to the Township's information to Bidders, general conditions and mandatory requirements must be clearly defined and are subject to acceptance or rejection by the Township in its sole discretion.

19 AWARD OF WORK

If a contract is to be awarded as a result of the RFP, it will be awarded to the Consultant whose proposal, in the Municipality's opinion, provided the best potential value to the Municipality and is capable in all respects to fully perform the contract requirements and the integrity to assure performance of the contract obligations.

The successful Consultant will be notified of the intent to award in writing, and the subsequent execution of a written agreement shall constitute the making of a contract. Consultants will not acquire any legal or equitable rights or privileges whatsoever until the contract is executed by both parties.

20 COMMUNICATIONS

All inquiries regarding this RFP are to be directed to the individual identified below. Inquires must be received in writing (email) no later than April 2nd, 2024. All inquiries received and the responses provided will be sent to all Consultants by way of written addendum(s) no later than April 10th, 2024 without naming the source of the inquiry.

The Township of Muskoka Lakes PO Box 129, 1 Bailey St
Port Carling ON.
POB 1J0

Attn: **Bryce Sharpe, Manager of Planning**
Planning@muskokalakes.ca
705-765-3156 ext. 235

Note that no oral explanation or interpretation shall modify any of the requirements or provisions of the RFP documents.

Where the Municipality deems that an explanation or interpretation is necessary or desirable, an addendum may be issued in writing. All addendums will be posted on the Municipality's website for downloading by all Consultants. It is the Consultant's sole responsibility to check for addenda issued and download same. Acknowledgement of Addenda on the proposal is a mandatory requirement. Failure to acknowledge addenda will result in a non-compliant proposal that is not eligible for award.

21 PROFESSIONAL CONSULTING AGREEMENT

Prior to commencing work on the project, the successful Consultant will enter into an Agreement for Professional Consulting Services.

22 CONFLICT OF INTEREST

The Municipality reserves the right to disqualify a proposal where the Municipality believes a conflict of interest or perceived or potential conflict of interest exists in regard to the Consultant and the intended project.

23 INTELLECTUAL AND PROPRIETARY RIGHTS

All intellectual, industrial or other proprietary rights of any type provided by the Municipality to the Consultants in relation to this RFP shall remain the respective property of the Municipality at all times.

In the case of intellectual Property owned by the Consultant prior to the proposal submission or created by the Consultant during the term of this proposal, the Consultant shall grant to the Municipality, a perpetual right and license to use, modify and reproduce in any form, those parts of the proposal and/or related contracted services.

24 MUNICIPAL FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT (MFIPPA)

All correspondence, documentation and information provided shall become the property of the Township. Any personal information required on the documentation presented is received under the authority of the Municipal Freedom of Information and Protection of Privacy Act, 1989, RSO, 1990. This information will be an integral component of the proposal submission.

25 HEALTH AND SAFETY AND WSIB

The successful Consultant is required to conform with the *Occupational Health and Safety Act* related to the performance of the contract. In addition, the successful Consultant will be required to supply to the Municipality a valid Clearance Certificate issued by the WSIB, or if applicable, a letter from WSIB verifying Independent Operator's Status. A new clearance certificate is required every sixty (60) days.

26 INSURANCE

The successful Consultant shall, at its/his/her own expense, obtain and maintain for the term of the contract and any renewal or extension thereof and provide the Municipality with evidence of:

Comprehensive general liability insurance on an occurrence basis for an amount not less than Two Million (\$2,000,000) Dollars, exclusive of interest or costs per occurrence, with respect to the successful

Consultant's operations, acts and omissions relating to its obligations under the contract, such policy to include coverages for defense and claimants' costs, and coverages for:

- personal injury including death;
- property damage or loss (direct or indirect and including loss of use thereof);
- broad form property damage;
- contractual liability;
- non-owned automobile liability;
- products and completed operations;
- contingent employers liability;
- cross liability;
- severability of interest; and
- owners' and contractors' protective.

The policy of insurance shall name the Municipality as an additional insured with respect to its interest in the operations of the Consultant.

Professional liability insurance or other errors and omissions insurance covering claims and expenses for liability for loss or damage arising from negligence in the provision of the Services, of standard wording, for an amount no less than Two Million (\$2,000,000) Dollars exclusive of interest or costs per occurrence; and

Automotive or Motor vehicle liability insurance of standard wording, covering all vehicles owned, leased or operated by or on behalf of the Consultant, in any matter in connection with the services provided or to be provided under the contract, for an amount not less than Two Million (\$2,000,000) Dollars exclusive of interest or costs per occurrence and equipment leased, borrowed, rented or operated for an amount of not less than Two Million (\$2,000,000) exclusive of interest or costs per occurrence.

Every policy of insurance shall contain either no deductible amount or a deductible amount which is reasonable considering the financial circumstances of the Consultant. The Consultant shall be responsible to pay all deductible amounts.

The Consultant shall provide the Municipality, within seven (7) days of award of Contract, a certificate from its insurer which shows that the policy or policies placed and maintained by it complies with the requirements of this RFP and the contract.

Failure to provide the aforementioned insurance will result in the withholding of payments or at the sole option of the Municipality, forfeiture of the Contract.

27 TERMS OF PAYMENT

The successful Consultant shall be reimbursed on a monthly basis for the actual work completed and time spent on the project. Monthly invoices are to include supporting documentation for all disbursements. Disbursements will be paid at cost.

Invoices submitted by the successful Consultant shall include the project title, a description of the work completed and a billing summary. This summary shall include the tasks set forth in the financial submission and shall indicate the budgeted cost, percentage invoiced to date and a total of these amounts for each task.

28 PROPOSAL VALIDITY

Proposals shall remain valid and open for acceptance by the Municipality for a period of sixty (60) calendar days following the deadline for receipt of proposals.

SECTION 2: BACKGROUND, OBJECTIVES, SCOPE OF WORK & DELIVERABLES

29 INTRODUCTION:

The Township of Muskoka Lakes is located in the District Municipality of Muskoka. The Township's natural beauty, pristine environment, and close proximity to the urban populations of Ontario and the northern United States has contributed to its historic and contemporary role as an iconic cottaging, recreation, and tourism destination recognized across the continent. The Township's small communities, waterfront, and rural areas provide an attractive lifestyle to its residents, both permanent and seasonal. For further information on the attributes of our community please visit <https://www.muskokalakes.ca/en/index.aspx>

The Township of Muskoka Lakes Official Plan (November 20, 2023) is the principle land use planning policy document used by the Township to establish goals and objectives for development and to establish a framework within which sustainable growth and community improvement can take place. In addition to adhering to good planning principles, the Official Plan was prepared within the context of the Provincial Policy Statement and the District of Muskoka Official Plan. The District of Muskoka approved the Township's Official Plan on November 20, 2023, and it is noted that it is currently under appeal to the Ontario Land Tribunal (OLT).

The Township of Muskoka Lakes is issuing a Request for Proposals (RFP) for specific consulting services to update the February 2023 consolidation of the Township's Comprehensive Zoning By-law (By-law 2014-14, as amended) through the provision of background research, professional planning advice, coordinating public consultation and through the provision of recommendations for implementing specific policy areas as outlined in the RFP.

In accordance with Section 26(9) of the Planning Act, the Township is required to review and amend the Comprehensive Zoning By-law to ensure that it conforms with the Official Plan that was approved in November 2023.

The Project Lead will be the Township's Manager of Planning. A Core Project Team will provide support as required to the Project Lead. A Project Steering Committee will help provide guidance. Other staff resources will be identified to provide project support as needed.

A Project Steering Committee comprised of relevant agency staff and key stakeholders (e.g. lake association representatives, building/development representatives, etc.) will be utilized at certain points throughout the project to review materials and provide feedback. This will help obtain stakeholder buy-in at important milestones in the project, evaluate alternatives, and verify direction where necessary.

- The By-law Review will be broken down into five (5) phases as follows (and further described in Attachment "A" – Terms of Reference): **Phase I: Project Initiation**, which will include a project kick-off meeting, completion of a detailed Work Plan, and completion of a Community and Stakeholder Engagement Strategy utilizing contemporary engagement methods.
- **Phase II: Technical Review and Issues Identification**, which will include the completion of a synthesis Background Review and Directions Report outlining concepts and highlighting important considerations identified through research, best practices, and detailing options and recommended directions.
- **Phase III: Community and Stakeholder Engagement**, completed in accordance with approved Engagement Strategy, and completion of a synthesis Community and Stakeholder Engagement Report detailing findings, options, and recommended directions.
- **Phase IV: Draft Comprehensive Zoning By-law Preparation**, including the provision of any necessary input to the District Municipality of Muskoka with respect to the preparation of Draft Zoning Schedules (mapping), and facilitation of further community and stakeholder engagement/Public Meeting(s) as

necessary.

- **Phase V: Approval**, including the completion of a Final Comprehensive Zoning By-law, Final Zoning Schedules (mapping), and Education and Implementation Material as necessary.

30 RESPONSIBLE DEPARTMENT:

Development and implementation of the Zoning By-law Update will be administered by the Development Services and Environmental Sustainability Department (the “Department”).

31 PROJECT OBJECTIVES:

The overall goal of this project is to update the Township’s Comprehensive Zoning By-law to implement the Township’s new Official Plan, as is required under Section 26(9) of the Planning Act. The key deliverable of the project will be an updated Comprehensive Zoning By-law and Zoning Schedules. Other deliverables will include a Work Plan, a Community and Stakeholder Engagement Strategy and Report, a Background Review and Directions Report, and Draft Comprehensive Zoning By-law and Zoning Schedules.

32 TERMS OF REFERENCE:

See Attachment “A” – Terms of Reference

33 FINAL SUBMISSION OF REPORTS/DRAWINGS:

All reports will be prepared in Microsoft Word and/or Excel and all drawings will be created in the latest version of Auto CAD and/or ESRI ArcGIS. Ownership of both hard copies and digital copies must be transferred to the Township upon completion of the project. Metric units with Imperial equivalents are to be used.

Detailed breakdown of cost estimates for Township budget purposes.

Should any mapping and associated database information be produced it is to be provided in ESRI (.shp) shapefile with object data attached. All information is to be tied to UTM coordinates using the standard NAD83 (Zone 17) datum and should be accompanied by supporting files (font files and plot files) if applicable. Please note that graphical images (.pdf, .cdr, .tif) and CAD files are not considered an acceptable GIS format.

Any GIS based file (ESRI .shp) shall follow Township and District GIS Standards including all related asset information as required.

34 TOWNSHIP REPRESENTATIVE:

The Project Manager, Bryce Sharpe, Manager of Planning will be the Township’s main contact for this project. All correspondence will be through this individual. Contact information is provided below.

35 FINANCIAL IMPLICATIONS:

The agreement between the Township and the Successful Bidder shall specify the project cost. Further, in this regard, please note the following:

The cost of advertising and room rentals required for meetings open to the public in the context of the public consultation process and the Township of Muskoka Lakes consultation process will be paid by the municipality. The municipality will be responsible for the preparation and placing of all advertising and notices and renting appropriate facilities.

The cost of any presentation support materials, exhibits and project products will be the responsibility of the Successful Bidder.

The Proposal must outline all costs associated with supplying the identified services.

36 DELIVERABLES

Minimum Deliverables

The key deliverable of the project will be an updated Comprehensive Zoning By-law and Zoning Schedules. Other deliverables will include a Work Plan, a Community and Stakeholder Engagement Strategy and Report, a Background Review and Directions Report, and Draft Comprehensive Zoning By-law and Zoning Schedules. See Attachment "A" – Terms of Reference, for more detail.

SECTION 3 PROPOSAL CONTENTS

37 PROPOSAL CONTENT:

Bid submissions are restricted to those consulting firms that can demonstrate qualifications and experience in the field of Land Use Planning. In particular, previous experience preparing Comprehensive Zoning By-laws for municipalities throughout Ontario, and have completed a project of this nature within the last five (5) years, for a municipality or jurisdiction of comparable (or greater) population in Ontario.

Bidders shall submit a bid, not including the covering letter, résumés and company credentials. Appendices are to be limited to résumés, project lists and corporate information.

The Bidder's proposal submission shall follow the order of components as outlined in the Evaluation Criteria. The bid shall include:

Project Understanding:

The consulting team should detail their understanding of the project specific to Muskoka Lakes.

Methodology:

The Bidder's proposed methodology for carrying out the work.

A detailed work plan and a weekly project schedule which will identify all major components of this project and their anticipated start and completion dates which must coincide with the dates provided by the Township.

Commitment (time and resources) expected to be provided by the Township.

A detailed work plan and time frame for the project including timing for each step of the work program, to be presented in a calendar-style format, based on the time allotted for the project based on the fixed schedule provided by the Township in Attachment "B". The consulting team will meet all work program commitments, timing and completion dates as agreed upon by the Township and the consulting team unless both parties agree to appropriate revisions to the agreement due to unforeseen circumstances. Any overruns in timing (unless otherwise agreed upon), or cost will not be the responsibility of the Township of Muskoka Lakes.

Identification of all sub-consultants, their qualifications and experience, as well as their specific role in the project.

Project Team and Leadership:

A description of the consulting team, the lead persons, and the relevant experience and qualifications of each individual along with an estimate of the percentage of time each key member will dedicate to this project (The individual's hours divided by total project hours).

Similar Work Experience and Local Expertise:

Similar work experience for the lead consulting team members shall be noted.

The municipality where the lead consulting team members reside will also be considered when reviewing local expertise.

References:

Provide at least three (3) references of similar work experience completed by the firm. Included with each reference shall be a contact name and contact information so that references can be checked. This shall

include all applicable contact information, as this will be a key component in the qualification of a Bidder. Bidders that do not fulfill this key component will be scored zero (0) on the Evaluation Criteria.

Schedule:

Start date	End date		
PROJECT NAME: T-2024-31			
Task	Start Date	End Date	% Completed

Cost:

A complete cost breakdown for the project presented in a tabulated format in cumulative hours with a total upset cost for the design to the point of completion and presentation of the final report.

The cost estimate of the Bid shall be submitted in **Envelope 2**.

Miscellaneous Items:

Appendices as noted above.

Disclosure of any litigation and real or perceived conflict of interest (see Attachment “D”).

38 PROPOSAL COST AND PERSON-HOUR ESTIMATE:

The bid shall outline the overall project cost breakdown and include the following:

- Cost breakdown and fee schedule of per diem or hourly rates for the Bidder and any sub-consultant(s) of the project team (see Attachment “B” – Fee Schedule and Cost Breakdown).
- A detailed time and cost breakdown of the workload, i.e., by staff and man- hours.
- Disbursement costs, which may include mileage, telephone charges, printing and reproductions, fax charges, courier services, computer services, etc.
- Compliance with the Township’s insurance requirements, as outlined herein.
- A summary of professional fees and disbursements, as outlined in Attachment “C”.

The Bidder shall note that the Township will consider the estimated total professional service fees for this project as an upset limit based on the work plan and the project duration assumed and will not consider extra items unless prior written approval has been obtained.

39 Basis of Selection

The Municipality intends to recommend the appointment of the Consultant on the basis of best overall value, as determined by the review of the technical proposal and fees. The Consultant appointment is subject to approval by the Municipality in accordance with the provisions of the Municipality's Purchasing By-Law.

40 Evaluation Criteria

Proposals will be assessed against the following criteria. The municipality reserves the right to shortlist firms for further evaluation and interviews which may alter the final scoring results. Proposals will be scored based on meeting or exceeding the expectations of the established evaluation criteria.

Evaluation Criteria		Weight Factor
1	Demonstrated Project Understanding	10
2	Project Methodology	15
3	Project Leadership and Team	15
4	Experience on Projects of a Similar Nature	10
5	References	20
6	Schedule	10
7	Proposed fee structure	20
Total		100

41 Overall Project Schedule

The following schedule is proposed for the selection of the successful respondent and for the completion of this assignment. The following schedule of activities is provided for planning purposes only. The Corporation of the Township of Muskoka Lakes reserves the right to cancel the activity or change the schedule at any time.

The following key dates listed are targeted as ones that will move this project forward.

The 100% Submission to Township Staff is to be completed by **April 22nd, 2024**.

Schedule

Action	Date (Approximate)
RFP Issued	First Quarter, 2024
Submission Date	First Quarter, 2024
Award of Assignment	Second Quarter, 2024
Completion of Phase I	Second Quarter, 2024
Completion of Phase II	Fourth Quarter, 2024
Completion of Phase III	First Quarter, 2025
Completion of Phase IV	Third Quarter, 2025
Completion of Phase V	Fourth Quarter, 2025

Note: Although every attempt will be made to meet all dates, the Corporation reserves the right to modify any or all dates at its sole discretion.

ATTACHMENT “A”
THE TERMS OF REFERENCE: ZONING BY-LAW UPDATE

OBJECTIVE

To update the Township’s Comprehensive Zoning By-law, as is required under the Planning Act, following the approval of an updated Official Plan. The updated Comprehensive Zoning By-law will be written to implement and conform with the Township’s approved (updated) Official Plan.

GENERAL APPROACH

The project is proposed to be divided into five components.

Phase I: Project Initiation, which will include a project kick-off meeting, completion of a detailed Work Plan, and completion of a Community and Stakeholder Engagement Strategy utilizing contemporary engagement methods.

Phase II: Technical Review and Issues Identification, which will include the completion of a synthesis Background Review and Directions Report outlining concepts and highlighting important considerations identified through research, best practices, and detailing options and recommended directions.

Phase III: Community and Stakeholder Engagement, completed in accordance with approved Engagement Strategy, and completion of a synthesis Community and Stakeholder Engagement Report detailing findings, options, and recommended directions.

Phase IV: Draft Comprehensive Zoning By-law Preparation, including the provision of any necessary input to the District Municipality of Muskoka with respect to the preparation of Draft Zoning Schedules (mapping), and facilitation of further community and stakeholder engagement/Public Meeting(s) as necessary.

Phase V: Approval, including the completion of a Final Comprehensive Zoning By-law, Final Zoning Schedules (mapping), and Education and Implementation Material as necessary.

SCOPE OF WORK

Project Initiation

- Project kick off meeting to introduce the Consultant Team and the Project Steering Committee.
- Discuss, with Township staff, a detailed Work Plan to set up an informed and transparent process based on key deliverables identified to complete the project within the allocated timeframe.
- Develop a strategy to maximize input from community and stakeholder resources and identify opportunities for meaningful public engagement based on contemporary methods.
- Prepare and finalize a Work Plan and Community and Stakeholder Engagement Strategy based on feedback by the Project Steering Committee and present to Planning Committee.

Deliverables: Final Work Plan and Community and Stakeholder Engagement Strategy

Technical Review and Issues Identification

- Review the Official Plan of the District Municipality of Muskoka, the Township’s approved (updated) Official Plan, and the February 2023 Consolidation of the Township’s Comprehensive Zoning By-law

(By-law 2014-14, as amended).

- Review site-specific zoning by-law amendments and minor variances approved since the passing of By-law 2014-14, as amended.
- Utilize staff experience to the best advantage and develop an issues list including 'housekeeping' considerations.
- Conduct background research, which includes a review of best practices and planning tools and consistency with current legislation and policies, including, but not limited to: residential standards, industrial, commercial and institutional standards, parking standards, accessory buildings and uses, and Accessibility for Ontarians with Disabilities Act (AODA) requirements.
- Prepare and submit a Draft Background Review and Directions Report for the Project Steering Committee's review. This synthesis report should focus on outlining concepts, highlighting important considerations identified through research, identifying best practices and available planning tools, and detailing options and directions.
- Finalize a Background Review and Directions Report based on feedback by the Project Steering Committee, present and seek approval from Planning Committee to initiate the Community and Stakeholder Engagement Strategy (referenced below).

Deliverables: Final Background Review and Directions Report, Presentations to Steering Committee and Planning Committee

Community and Stakeholder Engagement

- Engage with the community and stakeholders as per the Engagement Strategy to ensure the public and stakeholders have an opportunity to learn about and provide input into the review.
- Create materials to support public engagement and presentations (e.g. PowerPoint presentations, social media, newsletters, posters, display materials, comment forms, explanatory documents).
- Where necessary solicit community and stakeholder input on a range of options to be considered through the development of an updated Comprehensive Zoning By-law.
- Collect and analyze community and stakeholder input.
- Prepare a Community and Stakeholder Engagement Report detailing findings and any related technical considerations and present it to Steering Committee and Planning Committee.

Deliverables: Community and Stakeholder Engagement Report, Presentations to Steering Committee and Planning Committee.

Draft Comprehensive Zoning By-law Preparation

- Prepare a Draft Comprehensive Zoning By-law containing general and zone specific standards within identified land use designations (e.g. Waterfront, Urban Centre, Community, and Rural Areas).
- Provide for traceability by detailing and explaining various changes to the February 2023 Consolidation of the Township's Comprehensive Zoning By-law (2014-14, as amended), through for example, the use of a master document and concordance tables.

- Provide any necessary input to and coordinate with the District Municipality of Muskoka with respect to the preparation of Draft Zoning Schedules (mapping).
- Prepare presentations and attend meetings of Steering Committee and Planning Committee to present the Draft Comprehensive Zoning By-law.
- Facilitate and present at Public Meeting(s) to review the Draft Comprehensive Zoning By-law.

Deliverables: Draft Comprehensive Zoning By-law, Traceability Documents, Attend and Present at meetings of Steering Committee, Planning Committee and Public Meeting(s).

Approval

- Where necessary, recommend options for resolving concerns emerging from review of the Draft Comprehensive Zoning By-law by the public and Planning Committee.
- Prepare a Final Comprehensive Zoning By-law.
- Review Final Zoning Schedules prepared by the District Municipality of Muskoka.
- Present the Final Comprehensive Zoning By-law to Council and attend any necessary Public Meeting(s).
- Prepare Education and Implementation Material as necessary.
- Attend any Ontario Land Tribunal Hearings to resolve any appeals received to the approval of the Final Comprehensive Zoning By-law.

Deliverables: Final Comprehensive Zoning By-law, Finalize Zoning Schedules with the District Municipality of Muskoka, Education and Implementation Material including any graphics, guides, etc. and attendance at Tribunal Hearings.

GOVERNANCE

The Project Lead will be the Township's Manager of Planning who will work closely with other staff on their areas of expertise. A Project Steering Committee will provide initial feedback and guidance and will report to Planning Committee. It is intended to delegate Planning Committee authority for all decisions save for final approval. The Consultant Team will provide updates to Planning Committee at the end of each major project component and when determined necessary by the Project Lead. The ultimate authority for the update will be Township Council.

AVAILABLE INFORMATION

The following documents will be made available to the successful consultant upon award of the assignment:

- District Municipality of Muskoka Official Plan
- Approved (updated) Official Plan of the Township of Muskoka Lakes
- Comprehensive Zoning By-law of the Township of Muskoka Lakes
- Community Improvement Plan
- Any existing studies or Master Plans as requested.

PROJECT SCHEDULE

The intended approximate schedule for the project is expected to be as follows:

- Issue of Request for Proposals: First Quarter, 2024
- Receipt of Proposals: First Quarter, 2024
- Award of Consulting Assignment: Second Quarter, 2024
- Completion of Phase I: Second Quarter, 2024
- Completion of Phase II: Fourth Quarter, 2024
- Completion of Phase III: First Quarter, 2025
- Completion of Phase IV: Third Quarter, 2025
- Completion of Phase V: Fourth Quarter, 2025

It is expected that the update will take approximately 20-24 months and should be completed by the end of 2025. The actual schedule for the update will be set in consultation with the successful consultant based on the information included in their proposal.

ATTACHMENT "C"
PRICES

Consultant Organization: _____

Signing Officer Name: _____

Title: _____

Signature: _____

Date: _____

I/We, hereby propose and agree to provide Consulting Services for The Corporation of the Township of Muskoka Lakes, Public Works Department.
Prices

exclude all applicable sales taxes (HST).

Work Item/ Location	Lump Sum Price
Comprehensive Zoning By-law	
Fees	
Disbursements and Expenses	
TOTAL	

Notes:

1. Fees shall include all costs associated with; undertaking any inspections, purchasing software or equipment, sub-consultants, etc. required to complete the work.
2. Disbursements and expenses shall include any reasonable costs to complete the work.

ATTACHMENT "D"
LITIGATION AND CONFLICT OF INTEREST STATEMENT

In its sole discretion, the Township may reject a submission if the bidder:

- a. Has, at any time, threatened, commenced or engaged in legal claims or litigation against the Township.
- b. Is involved in a claim or litigation initiated by the Township.
- c. Previously provided goods or services to the Township in an unsatisfactory manner.
- d. Has failed to satisfy an outstanding debt to the Township.
- e. Has a history of illegitimate, frivolous, unreasonable, or invalid claims.
- f. Provides incomplete, unrepresentative or unsatisfactory references.
- g. Has engaged in conduct that leads the Township to determine that it would not be in the Township's best interest to accept the submittal.
- h. Has a conflict of interest, or that which may be viewed as a conflict of interest, either with or by the Township (see below).

The bidder, all sub-consultants, and any of their respective advisors, partners, directors, officers, employees, agents, and volunteers, shall not engage in any activity or provide any services where such activity, or the provision of such services, creates a conflict of interest (actually or potentially, in the sole opinion of the Township) with the provision of the work pursuant to the submission. The bidder acknowledges and agrees that a conflict of interest includes the use of confidential information where the Township has not specifically authorized such use.

The bidder shall disclose to the Township, in writing, without delay any actual or potential situation that may be reasonably interpreted as either a conflict of interest or a potential conflict of interest, including the retention of any sub-consultant or supplier that is directly or indirectly affiliated with or related to the successful bidder.

The bidder covenants and agrees that it will not hire or retain the services of any employee or previous employee of the Township where to do so constitutes a breach by such employee, or previous employee, of the employee's, or previous employee's employment contract, or the previous employer's conflict of interest policy, as may be amended from time to time.

A breach these provisions by the bidder, any of its sub-consultants, or any of their respective advisors, partners, directors, officers, employees, agents, or volunteers, shall entitle the Township to terminate the service agreement, in addition to any other rights and remedies that the Township has in the service agreement, in law, or in equity.

I, the undersigned, have read, understood and agreed to the above provisions.

Dated this _____ day of _____, 20XX.

Name of Authorized Signatory (print)

Signature (affix corporate seal)

ATTACHMENT "E"
ENVELOPE SUBMISSION INFORMATION

Envelope 1

**The Township of Muskoka Lakes
PO Box 129, 1 Bailey St
Port Carling ON.
P0B 1J0**

**Attn: Mr. Bryce Sharpe, Manager of
Planning**

**RFP NO.: T-2024-31
Comprehensive Zoning By-law
Update**

- a) PROPOSAL
- b) ADDENDUM (if applicable)

CLOSING: April 22nd, 2024 AT 2:00:00 P.M. LOCAL TIME

BIDDER NAME: _

Envelope 2

**The Township of Muskoka Lakes
PO Box 129, 1 Bailey St
Port Carling ON.
P0B 1J0**

**Attn: Mr. Bryce Sharpe, Manager
of Planning**

**RFP NO.: T-2024-31
Comprehensive Zoning By-law Update**

**SUMMARY OF PROFESSIONAL
FEES AND DISBURSEMENTS**

CLOSING: April 22nd, 2024 AT 2:00:00 P.M. LOCAL TIME

BIDDER NAME: _

PROPOSAL FORM

FOR THE PROVISION OF:

AS SUPPLIED BY:

FIRM NAME

ADDRESS

POSTAL CODE

(HEREINAFTER CALLED THE RESPONDENT)

TO:

THE CORPORATION OF THE TOWNSHIP OF MUSKOKA LAKES
PO Box 129, 1 Bailey St
Port Carling, ON P0B 1J0
(HEREINAFTER CALLED THE CORPORATION)

THE RESPONDENT DECLARES

2. No person(s), firm or corporation, other than the Respondent, has any personal interest in this Proposal or in the award for which this Proposal is made.
3. No member of Council, officer or employee of the Corporation is or will become interested directly or indirectly as a contracting party, partner, shareholder, and surety or in any portion of the profits thereof, or in any of the monies to be derived, there from.
4. This Proposal is made without any connection, comparison of figures, or arrangements with, or knowledge of any other corporation, firm or person making a Proposal for the same and is in all respects without collusion or fraud.
5. By signing this submission, I confirm I have read and understood the content and requirements of this Proposal document.

LOWEST OR ANY PROPOSAL NOT NECESSARILY ACCEPTED

ACKNOWLEDGEMENT TO RECEIPT OF ADDENDA

This will acknowledge receipt of the following addenda and, that the pricing quoted includes the provision set out in such addenda

ADDENDUM #

DATE RECEIVED

Check here if NO Addenda received

DATED _____

SIGNATURE OF WITNESS

SIGNATURE OF RESPONDENT

By my signature, I hereby confirm I am a principal, or have been duly authorized by the principal/board, to sign on behalf of the above named.

RESPONDENT INFORMATION FORM

RESPONDENTS must complete this form and include with the Proposal Submission. Please ensure all information is legible.

1.	Firm/Company Name	
2.	Respondent's Contact Individual	
3.	Office Phone #	
4.	Toll Free #	
5.	Cellular #	
6.	Fax #	
7.	E-mail address	
8.	Website	
9.	WSIB Account #	
10.	HST Account #	

RESPONDENT

SIGNATURE

DATE

Supplier Background and References

CORPORATE / COMPANY PROFILE

Please provide a corporate profile of your company, including an overview of your product offerings, your business model, and what differentiates you from your competitors.

ALLIANCES

Describe any technology and service alliances that your company has established.

REFERENCES

REFERENCE #1	
<i>Organization Name:</i>	
<i>Contact Name:</i>	
<i>Contact Title:</i>	
<i>Address:</i>	
<i>Telephone #:</i>	
<i>E-mail Address:</i>	
<i>Description of Services Provided</i>	

REFERENCE #2	
<i>Organization Name:</i>	
<i>Contact Name:</i>	
<i>Contact Title:</i>	
<i>Address:</i>	
<i>Telephone #:</i>	
<i>E-mail Address:</i>	
<i>Description of Services Provided</i>	

REFERENCE #3	
<i>Organization Name:</i>	
<i>Contact Name:</i>	
<i>Contact Title:</i>	
<i>Address:</i>	
<i>Telephone #:</i>	
<i>E-mail Address:</i>	
<i>Description of Services Provided</i>	