



REQUEST FOR A QUOTE

RFQ FIN-2019-01

Development Charges Background Study & By-Law Update

ISSUED: January 9, 2019

CLOSING DATE: January 22, 2019 at 12:00 p.m.

SUBMIT TO: The Corporation of the Town of Penetanguishene
P.O. Box 5009, 10 Robert Street West
Penetanguishene, ON L9M 2G2
ATT: Carrie Robillard, CPA, CGA
Director of Finance/Treasurer
Confidential RE: RFQ-FIN-2019-01

Information to Proponents

1. Scope of Project

The Corporation of the Town of Penetanguishene is seeking a quote from a qualified consultant to prepare a Development Charges Background Study and By-Law Update (the Town's current By-law 2014-34 expires on September 1, 2019).

2. Date of Quote Submission

Quotes are to be submitted in a sealed envelope by January 22, 2019 at 12:00 p.m. Digital submissions will not be accepted. The envelope must be addressed as follows:

The Corporation of the Town of Penetanguishene

P.O. Box 5009, 10 Robert Street West

Penetanguishene, ON L9M 2G2

RFQ FIN-2019-01

ATT: Carrie Robillard, CPA, CGA, Director of Finance/Treasurer

3. Project Contact

Carrie Robillard, CPA, CGA, Director of Finance/Treasurer

The Corporation of the Town of Penetanguishene

(705) 549-7453 Ext. 210

crobillard@penetanguishene.ca

4. Completion Date

May 24, 2019 – Development Charges Background Study and By-law Update

June 12, 2019 - Presentation to Committee of the Whole – Development Charges

Background Study and By-law Update, effective September 1, 2019

June 26, 2019 – Adoption by Council and passing of By-law

5. Scope of Work

5.1 Terms of Reference

The Town of Penetanguishene is seeking to engage a consultant to update the Town's Development Charges Background Study and to prepare an update to the Town's Development Charges By-Law pursuant to the Development Charges Act, 1997, S.O. 1997, Chapter 27, as amended. The Town of Penetanguishene's current Development Charges By-Law 2014-34 expires on September 1, 2019.

5.2 Background

The Town of Penetanguishene is a lower-tier municipality within the County of Simcoe and located on the southeast shores of Georgian Bay, often referred to as North Simcoe or Huronia, approximately 165 kilometres north of the City of Toronto. The Town is noted for its small-town character, welcoming multilingual citizens, mix of housing and employment opportunities and a diverse natural landscape. Penetanguishene recognizes its rich cultural history, dating back over 400 years, comprised of English, French, Métis and Indigenous communities. The Town is comprised of both urban and rural areas with an approximate population of approximately 9,000 as per the 2016 census. The Town offers a robust economy with focuses on manufacturing, health care, tourism and service industries as well as being home to the Waypoint Centre for Mental Health and the Central North Correctional Centre. The Town also sees a seasonal population of visitors and residents in the area and provides services to a broader population from the adjacent Town of Midland and Townships of Tiny and Tay.

6. Intent of the Project

6.1 Requirements & Deliverables

The Background Study shall meet all requirements of the Development Charges Act, and related Regulations. The Study shall be clearly written and well organized, include a Table of Contents and Appendices containing supporting data and information and a Draft By-law. The consultant will provide and present to members of Council in a format satisfactory to the Town of Penetanguishene.

6.2 Components to be included in the Background Study

The consultant will be expected to complete a review of the following background information and studies that will be made available to the successful proponent:

- a) Previous Development Charges Background Study (2014) and Amendment (2015);
- b) Draft Water and Wastewater Rate Study Report;
- c) Official Plan and supporting documents (ie. Growth Management Discussion Paper);
- d) Draft 10 Year Capital Plan; and
- e) Active, Pending and Forecasted Development Applications.

Complete an analysis based on revenues and expenditures to ensure anticipated development charges revenue will provide for necessary growth related expenditures.

Complete other necessary work in the preparation of a Development Charges Background Study and ensure the Study meets all the requirements of the Development Charges Act, as amended and related Regulations.

6.3 Study Completion Date

The Study is required to be completed by May 24, 2019 to support the adoption on June 26, 2019 of a new Development Charges By-Law, effective September 1, 2019. Town of Penetanguishene staff will co-ordinate the consultation process including notification to stakeholder groups and the public with respect to meetings. The consultant will present information and be available to respond to inquiries at meetings regarding the Study and By-law.

6.4 Meetings

The consultant will attend and make presentations to:

- a) Public Meeting(s) as required under the Act;
- b) Meeting(s) with Members of Council; and
- c) Interview and work with the Town's Senior Management Team (as required to conduct and complete a thorough background study).

7. Quote Structure and Content Requirements

7.1 Quote Submission Structure

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

7.2 Quote Content Requirements

Section	Content
1	Introduction
2	Qualifications and Background of Consultation Team
3	Project Schedule
4	Cost Estimate
5	References

7.2.1 Introduction

Proponents are to provide a brief introduction of the organization submitting the proposal. Proponents are invited to include, but not limited to the following information:

- a) General company profile (Ownership, affiliations, customers, number of years in operation, business segments etc.); and
- b) Address and lead contact information for the proposing entity.

7.2.2 Qualifications of Background of Consultation Team

This section is to include the proposed consultant team expected to be dedicated to the Town of Penetanguishene project. Identify the Project Leader and other Staff and include their special skills and experience in completing similar projects.

7.2.3 Project Schedule

This section is to include a project schedule. Clearly identify key deliverables and milestone dates.

*Please note that it is the intention of the Town of Penetanguishene to have a new Development Charges By-Law adopted by Council by June 26, 2019, effective as of September 1, 2019.

7.2.4 Cost Estimate

The Proponent's submission shall include:

- a) Overall project cost plus applicable Sales Tax identified separately.
- b) A detailed cost and time breakdown of each major activity of the project.
- c) A time and cost breakdown for each team member.
- d) Identifying any disbursements and the associated costs.
- e) A fee schedule and hourly rates for all project team members.

7.2.5 References

This section is to include client references (minimum of 3) for similar projects completed. The Town of Penetanguishene reserves the right to contact references, which may affect a Proponent's evaluation score.

8. Quote Process

8.1 Request for Quotes Schedule

The following table outlines the timeline that has been established for the selection process:

Task Description	Date
Request for Quotes Issued:	January 9, 2019
Proponent Questions Received by:	January 16, 2019 at 12:00 p.m.
Responses Provided by:	January 16, 2019
Quote Due Date:	January 22, 2019 at 12:00 p.m.
Anticipated Decision on Successful Proponent:	January 24, 2019
Anticipated Commencement of Work:	January 30, 2019

NOTE: Although every attempt will be made to meet all dates, the Town of Penetanguishene reserves the right to modify any or all dates at its sole discretion.

8.2 Documentation

- a) One (1) original and two (2) copies of the Quote are required.
- b) All Quotes must be legible and written in ink or typewritten.
- c) All Quotes must be submitted in a sealed envelope.

8.3 Communication

All requests for information and/or clarification as well as questions regarding the interpretation of the terms set out in this RFQ should be referred to:

Carrie Robillard, CPA, CGA, Director of Finance/Treasurer
705-549-7453 Ext. 210
crobillard@penetanguishene.ca

9. Evaluation Criteria

Each response to this Request for Quotes will be evaluated by the Town of Penetanguishene to determine the degree to which it responds to the requirements as set out. Other factors in addition to cost will be considered when submissions are evaluated. The lowest or any quote may not necessarily be accepted.

Factors to be considered will include, but not necessarily be limited to:

Evaluation Criteria	Weighted Percentage
Company Profile	10
Qualifications and Background of Consultation Team	10
Project Schedule	30
Cost Estimate	40
References	10
Total	100

10. Disqualification

The Town of Penetanguishene reserves the right to reject any or all Quotes. Failure of the Proponent to satisfy any term or condition of this RFQ may result in the rejection of said Quote. Further, any incomplete Quotes, Quotes not properly signed/dated, Quotes received after the closing date/time, Quotes completed in pencil, Quotes with incomplete calculations, and Quotes lacking required information will be rejected as incomplete.

11. Quote Withdrawal or Replacement

Any Quote may be withdrawn prior to the scheduled time for Quote closing by submitting written notice to the RFQ contact. Replacement Quotes are welcome until the Quote closing.

12. Quote Evaluation

All submissions must be in compliance with the requirements of the RFQ process in order to be considered for evaluation.

All qualifying Quotes will be reviewed and evaluated by the selection committee (2-3 Town of Penetanguishene Staff members) and final approval obtained by the Chief Administrative Officer, as per the Town's Procurement By-law.

13. Award Procedure

All Quotes shall be final and binding on the proponent for a period of 60 (sixty) days from the closing date and may not be altered by any subsequent offerings, discussions, or commitments unless the proponent is requested to do so by the Town of Penetanguishene.

The Town of Penetanguishene will notify the successful proponent of the award. The successful proponent agrees to undertake work within 5 business days of the date of notification of award.