



REQUEST FOR PROPOSALS
Professional Services for the Preparation of a
Secondary Plan for the Franktown Road Neighbourhood
RFP #2025-DS-02

Requirement:

The Town of Carleton Place, hereinafter referred to as the Corporation is seeking proposals to provide professional services to develop a “Secondary Plan for the Franktown Road Neighbourhood”, hereinafter referred to as “the Study”, as described in the terms of reference attached hereto as Annex “A”.

Period of Proposed Contract:

The proposed period of contract will be from the date of award, to the date of final acceptance of deliverables where final acceptance will be receipt of the plan by resolution of Council.

Project Manager:

The services provided will be subject to review and acceptance by the Project Manager hereby identified as the Director of Development Services or her designate.

Inquiries:

All inquiries regarding this Request for Proposal (RFP) are to be directed to the Contracting Authority specified herein. Inquiries must be received in writing (email) no later than **February 14, 2025**. All inquiries received, and the answers as provided by the Project Manager will be provided to all proponents by way of written addendum, no later than **February 19, 2025**, without naming the source of the inquiry.

Order of Precedence:

The documents listed below form part of the Request for Proposal (RFP) and will be incorporated into any resulting contract. If there is a discrepancy between the wording of one document and the wording of any other document which appears on the list, the wording of the document which appears first on the list shall take precedence:

Request for Proposal

Annex A - Project Information and General Terms of Reference

Annex B - Financial Proposal and Contractual Acknowledgement

Annex C - General Conditions - Consulting Services

Proposal Content:

Your proposal should include a demonstrated understanding of the scope and

particulars of the assignment. It is recommended that your submission not exceed ten **(10)** single-sided letter size pages, minimum 10-point font, including spreadsheets, which can be submitted in 11" x 17" format. Attachments such as resumes and workplan sheets will not be included in the page count.

The contents of your **Service Proposal** should address the evaluation criteria numbered **1** through **4** inclusive, which will be assessed by the review team and be submitted in this numerical sequence.

1. Experience and Qualifications of Team Members (20 points)

Identify the Project Manager and key team members of the project team to be employed on this assignment, including those from specialist or sub-consultant firms, describe their individual capabilities, relevant experience, respective roles, availability for this project and highlight individual experience with regard to similar work. Resumes should be included where appropriate.

2. Understanding of Objectives (5 points)

Describe your understanding of the assignment, including overall scope and objectives, noting any specific issues that may require attention.

Note: Responses that incorporate excessive blocks of text that have been copied directly from the RFP will not be regarded as demonstrating an understanding of the requirement.

3. Quality of Approach and Methodology (20 points)

Describe the approach and methodology to be followed in completing all aspects of the assignment in order to achieve the stated project objectives.

4. Proposed Work Plan, Schedule and Level of Effort (15 points)

Provide a work plan and schedule, including a breakdown of the major tasks, and the level of effort of the individual team members in sufficient detail to allow a complete understanding as to how and by whom the work is to be carried out.

(Note 1, that although the "person day allocations" are often included within the sealed financial proposal, the Corporation prefers that a copy, without financial details such as per diem rates, be included in your service proposal, so that the level of effort can be clearly determined and may be evaluated at this stage.)

Pass Grade

Only proposals that meet or exceed a score of **75 percent** on evaluation criteria numbered **1 to 4 inclusive (45 out of 60)** at this stage of the evaluation will be considered further. Proposals that do not meet the minimum score required will be deemed non-compliant, and the financial proposal will remain unopened.

Financial Proposal (40 points)

In a **SEPARATE ATTACHMENT**, clearly identified as **Financial Proposal**, and using Appendix B which is attached for that purpose, the Consultant is to provide a total upset limit price, to include all fees, disbursements and taxes, to complete this assignment in accordance with the Services detailed herein and in the Consultant's proposal. This financial proposal is to be broken down by category with expected timing identified in order to allow for budgetary control.

In order to allocate points for the Financial Proposal, a "**Benchmark Price**" will be determined by taking the average "**Total Upset Limit Price**" from all of the proposals received. Points will be awarded based on the following table:

Points Awarded when Bid Price is compared to Benchmark Price

Less than 105%	100%	of points awarded = 40 points
105 to less than 110%	90%	of points awarded = 36 points
110 to less than 115%	80%	of points awarded = 32 points
115 to less than 120%	70%	of points awarded = 28 points
120 to less than 125%	60%	of points awarded = 24 points
125 to less than 130%	50%	of points awarded = 20 points
130 to less than 135%	40%	of points awarded = 16 points
135 to less than 140%	30%	of points awarded = 12 points
140 to less than 145%	20%	of points awarded = 8 points
145 to less than 150%	10%	of points awarded = 4 points
150 and above	0%	of points awarded = 0 points

General Conditions - Consulting Services:

As provided for under the Contractual Acknowledgement of Annex B, the Consultant must certify acceptance of the General Conditions - Consulting Services which are attached as Annex C, which shall form part of and be incorporated into the proposed contract.

Basis of Selection:

The Project Manager intends to recommend the appointment of the Consultant on the basis of "**best overall value**" to the Corporation as determined by the proposal which attains the highest score out of the 100 points available based on the evaluation criteria. The Consultant appointment is subject to approval by the Town of Carleton Place in accordance with the provisions of the Purchasing By-Law.

Selection Process:

An evaluation team will review all proposals received and score the proposals using a "**consensus**" approach, in relation to the criteria and points which are identified. An award may be made solely on the basis of the proposal submission, without a meeting with the Consultant. However, one or more Consultants may be invited to attend a formal interview with the evaluation team, or to provide written clarification on their proposal. This formal interview, if applicable would be scheduled within the two weeks following closing.

Proposal Validity:

Proposals shall remain valid and open for acceptance by the Corporation for a period of sixty (60) calendar days, following the due date for receipt of proposals.

Municipal Rights and Options:

The municipality, in their sole discretion, reserves the following rights:

- Supplement, add to, delete from or change this solicitation document;
- Determine which respondent, if any, should be selected for negotiations;
- Reject any or all proposals or information received pursuant to this RFP;
- Cancel this RFP with or without the substitution of another RFP;
- Request additional data or information after the submittal date, if such data or information is considered pertinent to aid the review and selection process;
- Conduct investigations with respect to the qualifications and experience of each respondent;
- Take any action affecting the RFP or the services or facilities subject to this RFP that would be in the best interest to the municipality;
- Require one or more respondents to supply, clarify or provide additional information in order for the municipality to evaluate the proposals submitted;
- Waive any informalities or irregularities in the submittals or to re-advertise; and
- That the lowest, or any bid, will not necessarily be accepted either individually or collectively.

Submission of Proposal:

Please provide one **(1) electronic copy** of your service proposal, and **one (1) electronic copy** of your financial proposal, signed by an authorized official, clearly identified as to contents by email to:

Niki Dwyer, MCIP RPP
Director of Development Services
ndwyer@carletonplace.ca

Proposals **MUST** be received by email NOT LATER THAN **11:00 A.M. LOCAL TIME, on February 26, 2025.**

Proposals received after the above due date and time will not be considered.

Contracting Authority:

For further information regarding the Request for Proposal, or the assignment, please contact:

Corporation of The Town of Carleton Place
175 Bridge Street
Carleton Place, ON, K7C 2V8
Attention: Niki Dwyer, Director of Development Services
Telephone: (613) 257-6202
Facsimile: (613) 257-8170
E-mail: ndwyer@carletonplace.ca

It is essential that the elements contained in the proposal are stated in a clear and concise manner. Failure to provide complete information as requested will be to the consultant's disadvantage. Proposals should be submitted in the format requested, with an index and preferably including the criteria subject to point rating in a clear identifiable location. If a Consultant feels that the conditions will restrict it unnecessarily in any way, it should so state in its proposal. Any deviation from the stipulated conditions should be given in detail with an explanation as to why they are being proposed. The Corporation reserves the right to accept any proposal as submitted without prior negotiations. It is the responsibility of the Consultant to obtain clarification of the requirements contained herein, if necessary, prior to submitting a proposal. Each proposal will be evaluated solely on its content. Assessment of the proposal commences immediately after closing date.

The Corporation does not accept proposals submitted by facsimile transfer machine. This Request for Proposal does not commit the Corporation to award a contract or to pay any costs incurred in the preparation of a proposal, or attendance at a meeting with Corporation staff.

Annex A

Project Information and General Terms of Reference Professional Services for the Preparation of a Secondary Plan for the Franktown Road Neighbourhood

1.0 OBJECTIVE

The Town of Carleton Place is presently seeking professional services from a consulting firm, or consortium of firms, to prepare a Secondary Plan for an area of underutilized land within the Town's urban boundary ("the Franktown Road Neighbourhood"). This initiative will involve the evaluation of an intensification plan of a 25-hectare parcel of land in order to:

- Develop a comprehensive servicing policy that maximizes available infrastructure and minimizes the cost of upgrades and extensions;
- Considers the use of alternative stormwater management designs in order to maximize developable land;
- Adopt streamlined urban design guidelines and as-of-right uses within the area;
- Introduce density bonusing policies for the creation of rental and affordable housing;

Currently:

- The area represents 17 individually owned properties of un-serviced land with a current density of 0.5 units per net hectare;
- The properties are adjacent to serviced land uses and are prime parcels for infill and intensification.

The successful firm(s) will possess the requisite technical skills and corporate experience to deal with the complex matters to be addressed in the Secondary Plan and will be required to work directly with Town staff, stakeholders and Council in a professional manner.

This completed Study shall furthermore be considered by Council no later than **September 30th, 2025**.

1.1 BACKGROUND

The Town of Carleton Place is located in Eastern Ontario in Lanark County, approximately 46 kilometers west of downtown Ottawa. It is situated at the crossroads of Highway 15 and Highway 7. The Town of Carleton Place has an approximate area of 9 km² and an approximate population of 12,500 residents. The Town of Carleton

Place is a fast-growing community which borders the nation's capital. The County of Lanark's Official Plan indicates that Carleton Place's population is expected to increase to 21,000 by 2038.

In 2020, the Town commenced an Official Plan Comprehensive Review in order to plan for and allocate the growth to accommodate population projections assigned by the County of Lanark. Through the preparation of a Land Needs Background Study, it was determined that the Town had adequate land within the municipal urban boundary to accommodate the growth needs and three (3) potential growth scenarios were proposed for Council's consideration. Council directed staff to adopt policy which reflected a moderate intensification approach, focusing intensification within "Targeted Growth Areas" and integrating residential land uses within "Highway Commercial Lands".

While a moderate amendment to the Official Plan land uses policies was updated in the 2020 review, and a Secondary Plan lead by the Ministry of Transportation for the Highway 7 corridor was adopted and approved in 2020, the Town believes that there is a need for a more complete detailed design plan for the neighbourhood to consolidate policies specific to the area.

In the past five (5) years, the Town has seen particularly heightened interest in the development and re-development of land in a quadrant of Town located north of Highway 7 and east of Franktown Road (the study area) which was identified in the Official Plan's Land Needs Background Study as having significant infill potential. In assessing individual development applications, staff have identified that a Secondary Plan to guide the cohesive design and servicing of the neighbourhood to ensure the creation of an efficient "Complete Community" would add considerable value to the suite of policy documents used to regulate development in Town.

Figure 1 – Study Area



2. PROJECT SCOPE

2.1 General Requirements

The subject lands are located within the settlement area of the Town of Carleton Place and are adjacent to areas which have recently been developed and intensified. The site represents a “missing piece” between neighbourhoods, and it is the Town’s prerogative that future development includes connectivity and consistency within this landscape to create walkable 15-minute neighbourhoods.

This undertaking will allow property owners to prepare and plan for shovel ready developments and expedite the approval process. The lands within the study area represent unrealized potential and under-utilized lands within the Town’s settlement area. In order to tap into this potential, there is a need to plan new road and servicing connections to maximize development potential. By pre-zoning and pre-servicing the development lands, the Town can streamline future approvals which are consistent with the Secondary Plan.

The initiative seeks to maximize and efficiently plan the compact built form of the neighbourhood to maximize the use of serviced land within the Town of Carleton Place. Additionally, the Secondary Plan will investigate opportunities to implement carbon neutral and climate resilient urban design standards while encouraging land use patterns that minimize car dependency for daily trips.

Deliverables

At the end of the study, the consultant will present a Secondary Plan for adoption by the Town in accordance with the requirements of the Planning Act. The proposed Plan shall be presented as follows:

- a consolidated report with a vision statement, objectives and key land use policies as well as a background and methodology supporting the undertaking.
- a by-law for adoption by Council as an amendment to the Town’s current Official Plan; and
- any technical reports or documents prepared in support of the report and by-law (i.e. traffic studies, servicing report, engineering models, urban design reports)
- any conceptual plans showing road alignment, land use blocking, and stormwater and servicing plans.

2.2 Background Documentation

The following documentation will be available for review as background review work completed by the successful consultant:

- Town of Carleton Place Official Plan 2013, as amended
- Land Needs Background Study 2020
- Sanitary Sewer Hydraulic Capacity Assessment Memo 2023

- Transportation Master Plan 2022
- Water and Wastewater Master Plan 2022
- Recreation and Culture Master Plan 2023
- Recent Development Approvals within the Study Area
- MTO's 2020 TESR for Highway 7

2.3 Communications and Consultation

It is intended that the Secondary Plan Study be conducted in accordance with the requirements of the Planning Act, including the requirement for one (1) Open House/ Public Information Centre and one (1) Public Meeting. Given the limited number of property owners within the study area, one (1) design charette is also to be conducted in order to understand the desires and needs of the direct stakeholders and gather information regarding anticipated development proposals.

Meetings are to be conducted in-person at the Town Hall (175 Bridge Street, Carleton Place) or at a suitable location to the satisfaction of the Project Manager.

3. REPORTING AND DELIVERABLES

Meetings / Presentations

Meetings, unless otherwise specified, shall be undertaken electronically via Microsoft Teams or Zoom meeting platforms.

The following meetings will be required with key staff for the project:

- Project Initiation
- Design Charrette with Stakeholders (in-person)
- Open House / Public Information Centre (in-person)
- Public Meeting
- Presentation of Final Draft to Committee of the Whole

Scheduled Updates

- On a bi-weekly basis the consultant's project manager shall give an update by a Microsoft Teams meeting or Zoom to the Project Manager or her designate. An agenda shall be sent by the consultant two (2) days prior to the meeting. Topics shall include but not be limited to schedule, progress of contract, challenges, and budget including any claims for funds being requested beyond the scope of the contract which must be requested in writing and approved in advance.
- The date and time of the bi-weekly meeting shall be mutually agreed upon by both parties to accommodate schedules.

Final Report / Document Requirements

All draft documents, reports, schedules and information to be discussed at meetings

shall be forwarded a minimum of (7) days prior to the meeting date. The Consultant will be required to provide all presentation display materials as well as sufficient copies of the report and maps to meet the requirements of a full and active stakeholder participation process.

At the completion of the project, three (3) final copies and one (1) electronic copy of the completed deliverables shall be submitted. In addition, all text documents shall be forwarded to the Town on a multi-media disk and saved in both MS Word and Adobe (pdf) format. Any computerized mapping and drawings shall be submitted in Adobe format. All electronic documents must be fully accessible meeting WCAG 2.0 levels AA standards for posting on the Town's website.

4. SCHEDULING

The Request for Proposal process shall follow the dates identified unless formally adjusted by addendum:

- RFP Issued January 31, 2025
- Deadline for Inquiries February 14, 2025
- Release of Final Addendums February 19, 2025
- Deadlines for Submissions February 26, 2025 –11:00 A.M. Local Time
- Recommendation of Award February 28, 2025

5. SERVICES TO BE PROVIDED BY THE TOWN OF CARLETON PLACE

- General direction to the Consultant in the provision of services as necessary during the term of this agreement.
- Provide any background documents as available
- Provide electronic files, studies, and land use information where required to facilitate the works;
- Meet on an on-going basis with the Consultant to review progress and provide direction and technical input;
- Identify and provide contacts for appropriate municipal staff and stakeholders;
- Review information prepared by the consultant and comment in a timely manner;
- Authorize payment of invoices to the consultant.

Annex B

Financial Proposal and Contractual Acknowledgement

Basis of Payment:

The Consultant offers to provide the services detailed herein under Project Information and General Terms of Reference, and as further detailed in the Consultant's proposal, to the acceptance of the stated Contract Authority for the following Total Upset Limit Price.

Professional Fees: \$ _____

Disbursements: \$ _____

HST (13%) \$ _____

Total Upset Limit Price: \$ _____

The Consultant is required to provide a detailed price breakdown by major tasks with the Proposal. The breakdown should include the specific activities planned, the timing and associated level of effort by individual or classification, and the associated hourly or per diem rates for which the Consultant will seek payment.

Consultants should note the following when preparing their financial proposal:

Professional Fees:

Professional fees are to include the cost of sub-consultants.

Disbursements:

All reasonable and proper expenses incurred by the Consultant shall be reimbursed under this item without any allowance thereon for overhead and or profit. The following costs shall not be reimbursed:

- Communication expenses including facsimile, local phone and cellular charges
- Standard PC or computer aided design and drafting equipment (excludes specialized equipment or software as identified in Consultant's proposal)

Method of Payment:

Monthly payments shall be made based on time expended following receipt and acceptance of an invoice by the Project Manager. The invoice should include a breakdown by hours worked by individual team members on each major task and progress to the date on invoice. Additional back-up documentation shall also be provided where sub-contracted works form part of the overall work program.

Contractual Acknowledgement

The Consultant hereby agrees to be legally bound by the provisions of the resulting Agreement, including, but not limited to, the General Conditions - Consulting Services (Annex "C"). The Consultant further acknowledges and agrees that the final terms of the resulting Agreement with the Corporation shall be concluded and become legally binding when both parties have entered into a Professional Services Agreement.

SIGNED this _____ day of _____ in the year 2025.

CONSULTANT

I have the authority to bind the Corporation.

Company Name _____

Company Address _____

Phone # _____

Email
Address _____

Annex C General Conditions – Consulting Services

RETAINER AND STATUS OF CONSULTANT

The Corporation retains the Services of the Consultant and the Consultant hereby agrees to provide the Services described herein under the general direction and control of the Corporation. The Consultant is retained as an independent contractor for the sole purpose of providing the services. Neither the Consultant nor any of its personnel are engaged as an employee, servant, or agent of the Corporation.

2. SERVICES

The Services to be provided by the Consultant and by the Corporation are set forth in the Terms of Reference and the Proposal, as amended by the Agreement that shall be entered into at time of awarding of the contract and such Services as changed, altered or added to, under the provisions of this Agreement are hereinafter called the "Services". All Services shall be performed by staff of the Consultant and the Consultant shall not engage others to perform specialized services unless prior approval, in writing, is obtained from the Corporation.

3. COMPENSATION

The Corporation shall pay the Consultant in accordance with the provisions set forth in the Agreement.

4. STAFF AND METHODS

The Consultant shall perform the services to a professional standard in accordance with current "best practices" and shall skillfully and competently perform the Services and shall employ only skilled and competent staff thereon who shall be under the supervision of a senior member of the Consultant's staff.

5. RECORDS AND AUDIT

(1) In order to provide data for the calculation of fees on a time basis, the Consultant shall keep a detailed record of the hours worked by and salaries paid to its staff in the performance of the Services.

(2) The Corporation may inspect and audit the books, payrolls, accounts and records of the Consultant at any time, during the Consultant's normal business hours, with respect to any item for which the Consultant is seeking compensation from the Corporation.

(3) The Consultant, when requested by the Corporation, shall provide copies of receipts with respect to any disbursement for which the Consultant claims compensation from the Corporation.

6. CHANGES AND ADDITIONAL SERVICES

The Corporation may, with the consent of the consultant, in writing and at any time before or after the commencement of the Services, extend, increase, vary or otherwise alter the Services, and in such cases the Corporation shall pay the Consultant in accordance with agreed upon rates, either per hour, per diem or fixed costs, as may be determined.

7. SUSPENSION OR TERMINATION

The Corporation may at any time by notice in writing to the Consultant suspend or terminate the Services or any portion thereof at any stage of the undertaking, and the Consultant shall thereupon be entitled to payment for any of the Consultant's staff employed directly thereon together with such expenses and disbursements allowed under this Agreement. Upon receipt of such written notice, the Consultant shall perform no further Services other than those reasonably necessary to close-out the Services.

Upon written notice of suspension or termination, or upon a written demand by the Corporation at any time during the term of this Agreement, the Corporation shall be given and have the right to take possession of and use any completed or partially completed drawings, documents, software, equipment and other information prepared or to be supplied by the Consultant.

If the Consultant is practicing as an individual and dies or becomes incapacitated before the Services have been completed, this Agreement shall terminate as of the date of death, or incapacity, as applicable, and the Corporation shall pay for the Services rendered and disbursements incurred by the Consultant to the date of such termination.

8. INDEMNIFICATION

The Consultant shall indemnify and save harmless the Corporation from and against all claims, actions, losses, expenses, costs or damages of every nature and kind whatsoever which the Corporation, its employees, officers or agents may suffer as a result of the negligence or breach of contract of the Consultant, its employees, officers or agents in the performance of this Agreement, subject to the following:

a. CORPORATION PROVIDED INFORMATION:

The Corporation further acknowledges and agrees that the Consultant will not be held liable for any damages / losses of any kind or nature that may result from the use of inaccurate information or data provided to Consultant by the Corporation. The Corporation agrees to accept full responsibility for the accuracy of all information and data that it provides to the Consultant.

b. WORK PRODUCT LIMIT:

The Corporation further acknowledges and agrees that the Consultant cannot warrant the fitness of any records, documents or work product that are (i) incomplete due to early

termination or suspension of this agreement; or (ii) altered, revised, amended, or modified without the consent or knowledge of the Consultant.

9. FORCE MAJEURE

A party hereto shall not be responsible for failures in performance due to force majeure. "Force Majeure" means any circumstance or act beyond the reasonable control of a party to this Agreement claiming Force Majeure, including an intervening act of God or public enemy, war, blockade, civil commotion, fire, flood, tidal wave, earthquake, epidemic, quarantine restriction, a stop-work order or injunction, issued by a court or public authority having jurisdiction, or governmental embargo, which delays the performance of any obligation created by this Agreement beyond its scheduled time, provided such circumstance or act is not expressly dealt with under this Agreement or does not arise by reason of:

- the negligence or willful misconduct of the party claiming Force Majeure or those for whom it is responsible at law;
- any act or omission by the party claiming Force Majeure (or those for whom it is responsible at law) in breach of the provisions of this Agreement;
- lack or insufficiency of funds or failure to make payment of monies or provide required security;

provided further that, in the case of an event of Force Majeure affecting the Consultant, the Consultant notifies the Corporation as soon as possible and in any event within five (5) working days following the date upon which the Consultant first becomes aware (or should have been aware, using all reasonable due diligence) of such event so that the Corporation may verify same.

In any such event, Consultants agreement and price and schedule shall be equitably adjusted based on the actual work authorized and performed satisfactorily, and the rates agreed to in the agreement.

10. INSURANCE

a. COMMERCIAL GENERAL LIABILITY

The Company shall, at their expense obtain and keep in force during the term of the Agreement, Commercial General Liability Insurance satisfactory to the Town of Carleton Place and underwritten by an insurer licensed to conduct business in the Province of Ontario. The policy shall provide coverage for Bodily Injury, Property Damage and Personal Injury and shall include but not be limited to:

- (1) A limit of liability of not less than \$5,000,000/occurrence with an aggregate of not less than \$5,000,000
- (2) Add the Corporation of the Town of Carleton Place as an additional insured with respect to the operations of the Named Insured

- (3) The policy shall contain a provision for cross liability and severability of interest in respect of the Named Insured
- (4) Non-owned automobile coverage with a limit not less than \$2,000,000 and shall include contractual non-owned coverage (SEF 96)
- (5) Products and completed operations coverage
- (6) Broad Form Property Damage
- (7) Contractual Liability
- (8) Owners and Contractors Protective
- (9) The policy shall provide 30 days' prior notice of cancellation

b. PROFESSIONAL LIABILITY INSURANCE

The Company shall take out and keep in force Professional Liability insurance in the amount of \$2,000,000 providing coverage for acts, errors and omissions arising from their professional services performed under this Agreement. The policy SIR/deductible shall not exceed \$100,000 per claim and if the policy has an aggregate limit, the amount of the aggregate shall be double the required per claim limit. The policy shall be underwritten by an insurer licensed to conduct business in the Province of Ontario and acceptable to the Town of Carleton Place. The policy shall be renewed for 3 years after contract termination. A certificate of insurance evidencing renewal is to be provided each and every year. If the policy is to be cancelled or non-renewed for any reason, 90 days notice of said cancellation or non-renewal must be provided to the Town of Carleton Place. The Town of Carleton Place has the right to request that an Extended Reporting Endorsement be purchased by the Company at the Company's sole expense.

c. PRIMARY COVERAGE

The proponent's insurance shall be primary coverage and not additional to and shall not seek contribution from any other insurance policies available to the municipality.

d. CERTIFICATE OF INSURANCE

The proponent shall provide a Certificate of Insurance evidencing coverage in force at least 10 days prior to contract commencement.

See Part "A" Information to Bidders, which forms part of this bid document, for additional requirements.

The successful bidder will be required to submit proof of Workplace Safety Insurance Board Coverage, within ten (10) working days of receiving the Acceptance Notice and shall provide additional certificates as often as is deemed necessary by the Town during the term of the contract to ensure continued good standing with the Workplace Safety & Insurance Board.

Failure to provide such proof shall result in cancellation of the Contract.

11. CONFLICT OF INTEREST

Neither the Consultant nor any person, firm or corporation associated or affiliated with or subsidiary to the Consultant shall undertake any work, or have an interest either directly or indirectly in any work arises from the Services. The Consultant is required to disclose to the Corporation, prior to accepting this assignment, any potential conflict of interest. If a conflict of interest exists, the Corporation may, in its discretion, withhold this assignment from the Consultant until the matter is resolved to the satisfaction of the Corporation. If, during the term of this Agreement the Consultant is retained by another client and that assignment gives rise to a potential conflict of interest, the Consultant shall so inform the Corporation and if a conflict of interest is deemed to exist by the Corporation, the Consultant shall either refuse the new assignment or take such steps to remove the conflict of interest as are deemed necessary by the Corporation.

12. ASSIGNMENT

Neither party may assign this Agreement or any portion thereof without the prior consent in writing of the other.

13. PREVIOUS AGREEMENTS

This Agreement supersedes all previous agreements, arrangements or understandings between the parties whether written or oral in connection with or incidental to the Services.

14. APPROVAL BY OTHER AUTHORITIES

Where either the Services of the Consultant or the Project is subject to the approval or review of an authority, government department or agency other than the Corporation, such approval or review shall be obtained through the offices of the Corporation and unless authorized by the Corporation in writing, such approval or review shall not be obtained by direct contact by the Consultant with such other authority, government department or agency.

15. INSPECTION

The Corporation, or persons authorized by the Corporation, shall have the right, at all reasonable times, to inspect or otherwise review the Services performed, or being performed, under the Project and the premises where they are being performed.

16. PUBLICATION

The Consultant shall obtain the consent in writing of the Corporation before publishing or

issuing any information regarding the Project.

17. CONFIDENTIAL INFORMATION

Information communicated to or acquired by the Consultant in the course of carrying out the Services provided for herein shall not be either divulged or used by the Consultant on any other project unless prior approval, in writing, is obtained from the Corporation. The Consultant shall not at any time before, during or after the completion of the work divulge any confidential information acquired in the course of carrying out the work provided herein. No such information shall be used by the Consultant before, during or after the completion of work on this or any other project without the prior written approval of the Corporation.

18. MUNICIPAL FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

The Corporation is subject to the *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990,c.M.56, as amended (“MFIPPA”) with respect to, and protection of, information under its custody and control. Accordingly, all documents provided to the Corporation in response to this Request for Proposal may be available to the public unless the party submitting the information requests that it be treated as confidential. All information is subject to MFIPPA and may be subject to release under the Act, notwithstanding the Consultant’s request to keep the information confidential.

19. DRAWINGS AND DOCUMENTS

Drawings and documents or copies thereof required for the Project shall be exchanged between the parties on a reciprocal basis. Drawings and documents, including all drawings and documents delivered in an electronic, digital or other than paper format, prepared by the Consultant for the Corporation shall be the property of the Corporation free of all claims by the Consultant of any nature and kind whatsoever. The Consultant shall be entitled to retain a copy of all drawings and documents for record keeping purposes only and at its own expense.

20. PATENTS

(1) The Consultant shall make a prompt written disclosure of any patentable invention, improvement or discovery conceived or first actually reduced to practice in the performance of the Services and shall submit separately, or as part of the final report on the Project, a complete list of all such inventions, improvements and discoveries, including those previously disclosed.

(2) Subject to the provisions of this Section, any patentable rights or other rights in any invention, improvement or discovery conceived or actually reduced to practice in the performance of the Project, shall be the property of the Consultant.

(3) The Consultant, upon request in writing, shall grant to the Corporation, for itself, the

Province or any other Corporation in Ontario, pursuant to any statute of the Province, an irrevocable, nonexclusive, royalty-free license to practice any invention, improvement or discovery conceived or actually reduced to practice, in the performance of the Services, in the manufacture, use and disposition, according to law, of any article or material, and in the use of any method, but such license shall not include the right to sub-license.

21. LOCATION OF CONSULTANT'S OFFICE

For the purposes of this Agreement, all Services performed by the Consultant shall be deemed to be performed in the office of the Consultant, with the exception of Project Meetings (Project Coordination etc.) which will be located in the Corporation of the Town of Carleton Place unless written approval of an alternate location is obtained from or agreed to by the Corporation. All fees and disbursements shall be calculated and invoiced according to the applicable deemed location of the Consultant's office. Project update meetings shall occur via Zoom or MS Teams.

22. TIME

(1) The Consultant shall perform the Services expeditiously to meet the requirements of the Corporation and shall complete any portion or portions of the Services in such order as the Corporation may require.

(2) The Consultant shall perform all the Services required under this Agreement by the date or dates stated in the Purchase Order, or as otherwise approved, in writing, by the Corporation. Requests for extensions of the completion date shall be submitted, in writing, by the Consultant no later than twenty (20) days prior to the completion date.

(3) The Corporation shall give due consideration to all designs, drawings, plans, specifications, reports, tenders, proposals and other information submitted by the Consultant, and shall make any decisions which are required in connection therewith within a reasonable time so as not to delay the work of the Consultant.

23. PAYMENT OF FEES

(1) The Consultant shall submit an invoice to the Corporation for all Services completed in the immediately preceding month. Interest at an annual rate equivalent to the Bank Rate established by the Bank of Canada for Short Term advances to chartered banks will be paid on the total outstanding unpaid balance commencing thirty (30) days after the Corporation has received and approved the Consultant's invoice.

(2) Where the Consultant is to be paid on a time basis for any part of the Project, no part of such fee shall be based upon any hours of work that have not been recorded as required by the provisions of this Agreement or upon any salary other than the salary applicable to the particular type of work performed as approved by the Corporation.

24. INTERIM EXPENDITURE REPORTS AND PAYMENT RESTRICTION

(1) The Consultant shall notify the Corporation, in writing, when fifty percent (50%) of the total funds allocated for the Services have been expended, and again when seventy-five percent (75%) of the funds have been expended.

The Consultant shall submit, with each of these notices, a detailed report of the Services completed at the interim expenditure dates.

(2) The Consultant's total fees and disbursements for the performance of all the Services required under the terms of this Agreement shall not exceed the total amount stated in the RFP unless otherwise agreed to in writing by the Corporation.

(3) The total amount specified in the Agreement, as well as all applicable taxes payable, shall represent the total amount payable to the Consultant with respect to the provision or supply of any Services or intangible property by the Consultant to the Corporation, or in connection with the provision, supply, transfer or sale of any goods, material or tangible property by the Consultant to the Corporation pursuant to this Agreement. Any changes in taxes payable during the Term of Services may, in the discretion of the Corporation, either increase or decrease the total amount payable to the Consultant under the terms of this Agreement.

25. OCCUPATIONAL HEALTH AND SAFETY

The Consultant shall ensure that all Services are provided in a manner that complies with the Occupational Health and Safety Act, R.S.O. 1990, c.O.1, as amended, and the regulations made thereunder.

26. ACCESSIBLE CUSTOMER SERVICES

The consultant shall ensure that all persons performing the work and who have contact with the public are trained in accordance with the Accessible Customer Service Standards under the Accessibility for Ontarians with Disabilities Act, 2005.

The final report submitted by the Consultant shall comply with AODA standards.

27. REPLACEMENT OF PERSONNEL AND/OR SUB-CONSULTANTS

(1) When specific persons have been named in the Contract as the persons who must perform the Work, the Consultant shall provide the services of the persons so named unless the Consultant is unable to do so for reasons beyond its control.

(2) If at any time, the Consultant is unable to provide the services of any specific person named in the Contract, it shall provide a replacement person who is of similar ability and attainment.

(3) The Consultant shall, before replacing any specific person named in the Contract, provide notice in writing to the Corporation. The replacement must be acceptable to the Project Manager.

28. SUCCESSORS AND ASSIGNS

The Contract shall ensure to the benefit of, and shall be binding upon, the successors and permitted assignees of the Corporation and of the Consultant.

29. FRAUD OR BRIBERY

Should the Consultant or any of his/her agents give or offer any gratuity to, or attempt to bribe any member of the awarding body, officer or servant of the Corporation, or to commit fraud against the Corporation, the Corporation shall be at liberty to declare the proposal void forthwith, or to take the whole or any part of the contract out of the hands of the Consultant and to invoke the provisions of termination.

30. AWARD

Any award resulting from this Request for Proposal will be in accordance with the Corporation Purchasing By-law and may be subject to Corporation Council approval.

31. SEVERABILITY

If any provision of this Contract becomes illegal or unenforceable in whole or in part, the remaining provisions shall nevertheless be valid, binding and subsisting.

Attachment 1

**REPRESENTATION, WARRANTY AND ACKNOWLEDGEMENT REGARDING ACCESSIBLE
CUSTOMER SERVICE TRAINING
REPRESENTATION AND WARRANT**

(Insert Company Name) _____

Hereby represents and warrants that:

1. My/Our employees, agents, volunteers or others for whom I/We are responsible, will have successfully completed Accessible Customer Service Training prior to commencement of the Work on behalf of the Corporation of the Town of Carleton Place, in accordance with the award of RFP Consulting Services to complete the works described herein.
2. The Accessible Customer Service Training provided will encompass the following training content:
 - a. A review of the purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the customer service standard;
 - b. How to interact and communicate with people with various types of disability;
 - c. How to interact with people with disabilities who use an assistive device, service animal or a support person;
 - d. How to use the equipment or assistive devices available on Town premises that are otherwise provided that may help with the provision of goods or services to people with disabilities;
 - e. What to do if a person with a particular type of disability is having difficulty accessing the Town’s goods or services; and
 - f. The Town’s accessible customer service policies, procedures and practices governing the provision of goods or services to people with disabilities.

ACKNOWLEDGEMENT

I/We, the undersigned, acknowledge and agree that this representation and warranty will be relied upon by the Corporation of the Town of Carleton Place and as such I/We solemnly provide this representation and warranty as if it was given under oath.

Company Name

Signature(s)	PRINT NAME	PRINT TITLE
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Signature(s)	PRINT NAME	PRINT TITLE
--------------	------------	-------------

Date:

I/WE HAVE THE AUTHORITY TO BIND THE COMPANY

Appendix A
ACKNOWLEDGEMENTS

I/WE ACKNOWLEDGE THAT:

1. This Proposal is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm, or person making a Proposal for the same work and is in all respects fair and without collusion or fraud.
2. All matters stated in the Proposal are in all respects true.
3. The undersigned have carefully read the General Terms and Conditions and Requirements per the RFP and have satisfied ourselves as to the conditions under which the work is to be carried out, and do hereby make an offer to the Corporation of the Town of Carleton Place to complete the **Preparation of a Secondary Plan for the Franktown Neighbourhood.**
4. _____ addenda have been received and that this is my/our ultimate responsibility to ensure all addenda issued have been received.
5. Acceptance of this Proposal and the issuance of a Purchase Order shall be considered a binding Agreement upon both parties. If specified at any time by the Town, it is acknowledged and agreed that the terms and conditions and any representations made in reference to this Proposal shall be incorporated in an Agreement to be executed by the parties once the Town of Carleton Place has formally accepted the Proposal
6. The Proposal will be evaluated on the basis of the submission contained herein and that the detailed results of the evaluation are final and will be made public except for each Proponent being provided their own overall score in each evaluative category, if requested.
7. And warrant that the price submitted shall be firm for a period of 90 days from the date of the Proposal closing.

I/We _____ have examined the Request for Proposal, do hereby offer and agree to provide the works described in this Request for Proposal and at a price indicated on **Appendix B “Pricing Summary”**.

Dated at _____ this _____ day of _____, 2025.

Firm or Organization Name	Signing Authority	Signature
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Street Address	City	Postal Code
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Telephone	Fax	Email
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All reasonable and proper expenses incurred by the Consultant shall be reimbursed under this item without any allowance thereon for overhead and or profit. The following costs shall not be reimbursed:

- Communication expenses including facsimile, local phone and cellular charges
- Standard computer costs

Method of Payment:

Monthly payments shall be made based on time expended following receipt and acceptance of an invoice by the Project Manager. The invoice should include a breakdown by hours worked by individual team members on each major task and progress to the date on invoice. Additional back-up documentation shall also be provided where sub-contracted works form part of the overall work program.

**Appendix C
REFERENCES**

Company Name and Phone Number	Contact Person(s)	Description of Services, Length of Contract, etc.
1.		
2.		
3.		
4.		

**Appendix D
SUBCONSULTANTS**

Listed below are the names and address of all sub consultants, together with the item(s) or services sublet to each in relation to this Agreement.

The employment of subconsultants other than those listed below will not be permitted without the written authorization of the Town.

NAME	ADDRESS	ITEM / SERVICE SUBLET
1.		
2.		
3.		