



The Corporation of the Town of Carleton Place

Request for Proposal
Professional Services
Municipal Land Use Planning

Proposal #: DS-01-2026

Closing Date: Friday, February 13, 2026

Closing Time: 11:00 a.m. local time

Location: Bids will not be opened in public however, any party registering with the Director of Development Services, Niki Dwyer ndwyer@carletonplace.ca will receive an email list of Proponents without pricing.

Late Bids Will Not Be Accepted.

The Corporation of the Town of Carleton Place reserves the right to accept or reject all or part of any Bid and reserves the right to accept other than the lowest bid and to cancel this call for bids at any time.

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Part “A” Information to Proponents

1. Purpose

The Town of Carleton Place is seeking proposals from firms wishing to provide professional services for municipal land use planning services on a fee-for-service basis, hereinafter referred to as “the Proposal”, as described in the terms of reference attached hereto.

The Town intends to select a Proponent to carry out the scope of work, based on the proposals submitted and the evaluation indicated in this document.

2. Schedule of Work

The following schedule must be strictly adhered to. Only those firms who can commit to meeting this schedule should submit proposals.

RFP Closing Friday, February 13, 2026, at 11:00 a.m. local time

Contract Duration:

This contract shall be in effect starting from March 16, 2026, at the latest, and continuing through to the end of the municipal fiscal year, December 31, 2026. Contract start time may be negotiated to commence prior to March 16, 2026, based on the availability of the Proponent.

3. Applicable Document Fees

Not applicable.

4. Bid Deposit Requirements

Not applicable.

5. Performance Surety Requirements

Not applicable.

6. Evaluation Criteria

Proposals shall be evaluated based on:

Evaluation Criteria	Weight
A) Proponent and Key Personnel Experience	
Direct Proponent and Principal staff experience with relevant experience	5%
The experience of the project team members that will be assigned to this project	15%
Appropriate reference information gathered from customers that the vendor has provided like services	5%
B) Technical Approach	
Quality of overall approach, work methodology, identification of project constraints	20%
C) Schedule of Work	
Work plan and schedule (responsiveness to meet or exceed requirements)	15%
D) Consulting Services Cost	
Cost of consulting services with details as to the method and basis of compensation including a breakdown of overall cost including all fees and other charges	40%

Scoring Rubric		
10	Excellent	Exceeds the requirements of the criterion in superlative beneficial ways/very desirable.
9	Very Good	Exceeds the requirements of the criterion in ways which are beneficial to the Town's needs
8		Exceeds the requirements of the criterion but in a manner, which is not completely beneficial to the Town's needs
7	Good	Fully meets all requirements of the criterion.
6		Adequately meets most of the requirements of the criteria. May be lacking in some areas which are not critical.

5	Average	Addresses most, but not all, of the requirements of the criteria to minimally acceptable level. May be lacking in some areas which are not critical.
4	Poor	Barely meets most of the requirements of the criterion to the minimum acceptable level. May be lacking in some areas which are not critical.
3		Minimally addresses some, but not all, of the requirements of the criterion. Lacking in critical areas.
2	Unsatisfactory	Inadequately satisfies one or some of the requirements.
1		Does not satisfy the requirements of the criterion in any manner.

After an initial review of the proposals, Consultants may be interviewed and requested to provide sample information of where the Consultant has recently completed work of a similar scope and focus.

7. Proposal Submission Requirements

Each Proponent is asked to submit via email to ndwyer@carletonplace.ca with two (2) attachments. One (1) attachment containing the proposal with no pricing information (labelled “Proposal” and company name) and the other containing only the pricing (labelled as “Pricing” and company name. **Please ensure your attachments are labeled clearly.**

8. Proposal Award

Proposal award will be made based upon the highest scored proponent in the evaluation process.

9. Inquiries

All inquiries regarding this Request for Proposal (RFP) are to be directed to Niki Dwyer, Director of Development Services as specified herein. Inquiries must be

received via email no later than **11:00 a.m. on Wednesday, January 21, 2026**. All inquiries received, and the answers provided by the Director will be provided to all proponents by way of written addendum, no later than **5:00 p.m. Wednesday, January 21, 2026**, without naming the source of the inquiry.

10. Amendments to "Standard Terms and Conditions"

Where Amendments to the Town's "Standard Terms and Conditions" are contained herein, it should be noted that these Amendments supersede any of the foregoing Terms and Conditions.

11. Mandatory Site Visit

Not applicable.

Part “B” Standard Terms and Conditions

1. Definitions

RFP	The document issued by the Town in response to which Quotations/Tenders/Proposals are invited for the performance of the work or supply of equipment.
Proponent	A person (s), firm(s) or corporation(s) who has submitted a bid.
Proponent	The person(s), firm(s) or corporation(s) to whom the Town has awarded the contract.
Contract	The Quotation/Tender/Proposal, the bonds or security (if any), the Proponent's Quotation/Tender/Proposal, and change notices, appendices, and addenda (if any), Formal contract.
Town	The Town of Carleton Place, its successors and assigns.
Equipment	The materials, machinery, assemblies, instruments, devices or articles, or components thereof, which are the subject of the contract.
Notice of Award	Notice provided to the successful Proponent of contract award.
SubProponent	A person(s), firm(s) or corporation(s) having a contract with the Proponent for any part of the work.
Work	All materials, equipment fixtures, services, supplies, and acts required to be done, furnished and/or performed by the Proponent.

2. Bid Closing Time

Each Proponent is asked to submit via email to ndwyer@carletonplace.ca with two (2) attachments. One attachment containing the proposal with no pricing information and the other containing only the pricing. Please ensure your attachments are labeled clearly.

Proposals shall arrive in the inbox of Niki Dwyer, Director of Development Services, Town of Carleton Place, no later than the specified time and closing date on page one of the RFP document. Late bids shall not be accepted; however, they shall be time and date stamped once received.

The time registered on the recipient's computer clock will be considered the official time when determining exact time of submission.

3. Document Fees

Not applicable.

4. Bid Requirements

Proponents are required to conform to the conditions listed below and those failing to do so may be subject to disqualification.

- a) Bids must be submitted on the bid form supplied by the Town. Bid submissions must not be restricted by a statement added to the bid form or by a covering letter, or by alterations to the bid form supplied unless otherwise provided in the bid document.
- b) Bid submissions shall consist of "Part "D" Bid Form" and all other sections and requirements as requested within the bid document. See "Part "D" Bid Form" for all requirements requested within the bid document.
- c) The Bid Form shall be signed in the space(s) provided by a duly authorized official of the entity bidding. If a joint Bid is submitted, it shall be signed on behalf of each of the Proponents and if the signing authority for both Proponents is vested in one individual, he/she shall sign separately on their behalf. Signatures on behalf of non-incorporated bodies or by individuals shall be witnessed. In the case of an incorporated Proponent, the corporate seal should be affixed to the Bid Form adjacent to the authorized signature.
- d) Bids must be legible, written in ink or typewritten. Erasures, over-writing or strikeouts must be initialized by the person signing on behalf of the Proponent.
- e) Adjustments by telephone, e-mail or letter to a bid already submitted will not be considered. A Proponent desiring to make adjustments to a bid must withdraw the bid and/or supersede it with a later bid submission prior to the specified bid closing time.
- f) Each Proponent is asked to submit via email to ndwyer@carletonplace.ca with two (2) attachments. One attachment containing the proposal with

no pricing information and the other containing only the pricing. Please ensure your attachments are labeled clearly with one file labelled as “Proposal” and company name, and the other labelled as “Pricing” and company name.

- g) Proposals shall arrive in the inbox of the Niki Dwyer, Director of Development Services, Town of Carleton Place, no later than the specified time and closing date on page one of the RFP document. Late bids shall not be accepted; however, they shall be time and date stamped.
- h) The submission email must clearly identify the name of the Proponent, address of Proponent, and state in the email subject line “DS-01-2025 “Proposal for Municipal Land Use Planning Services”. Proposals received after closing time specified in the bid document will not be considered.
- i) Delivery of the Bid submission via email shall be the responsibility of the Proponent and shall result in the submission being rejected where:
 - i. Bid submission is delivered to an email location other than which is stated on the submission and fails to be delivered prior to the closing date and time; and/or
 - ii. Bid submission attachments are not marked as per the directions, as per Section 4f) above.
 - iii. Bid submission is delivered later than the closing date and time.
- j) Each item in the bid-documents shall be a reasonable price for such item. Bids that contain prices which appear to be unbalanced as to affect adversely the interest of the Town may be rejected. The Town will be the sole judge in this matter.

5. Proponent's Statement of Understanding

It is understood that the Proponent has carefully examined all the bid documents and has carefully examined the work to be performed under the Contract if awarded. The Proponent also understands and accepts the said bid documents, and for the prices set forth in the Bid, hereby offers to furnish all labour, machinery, tools, apparatus and other means of implementation, and materials, where applicable to complete the terms and conditions and requirements in strict accordance with the bid documents.

None of the conditions contained in the Proponent’s (seller's) standard or general (printed) conditions of sale shall be of any effect unless explicitly agreed to by the Town as set forth or specifically referred to therein.

The Proponent declares that their submission is not made in connection with any other Proponent submitting an offer for the same commodity or commodities and is in all respects fair and without collusion and fraud.

The contract shall be governed and interpreted in accordance with the laws of the Province of Ontario.

6. Changes and Additional Services

The Corporation may, with the consent of the Proponent, 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 Proponent in accordance with agreed upon rates, either per hour, per diem or fixed costs, as may be determined.

7. Clarification of Bid Documents

No officer, agent or employee of the Town is authorized to alter orally any portion of these documents. During the period prior to submission of Proposals, alterations will be issued to Proponents as written addenda. The Proponent shall list in its bid all addenda that were considered when their Proposal was prepared.

The Town will issue all written addendums to the bid documents to the invited parties.

Proponents are required to confirm receipt of each addendum. Although the Town will make every reasonable effort to ensure that each Proponent receives all addenda issued, it is each Proponent's ultimate responsibility to ensure all addenda have been received.

8. Bid Deposit Requirements

Not applicable.

9. Performance Surety Requirements

Not applicable.

10. Indemnification

The Proponent 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 Proponent,

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 Proponent 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 the Proponent by the Corporation. The Corporation agrees to accept full responsibility for the accuracy of all information and data that it provides to the Proponent.

B. Work product limit:

The Corporation further acknowledges and agrees that the Proponent 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 Proponent.

11. Insurance and Workplace Safety Insurance Board

Commercial General Liability

The Proponent 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:

- (a) A limit of liability of not less than \$2,000,000/occurrence with an aggregate of not less than \$2,000,000
- (b) Add the Corporation of the Town of Carleton Place as an additional insured with respect to the operations of the Named Insured
- (c) The policy shall contain a provision for cross liability and severability of interest in respect of the Named Insured
- (d) Non-owned automobile coverage with a limit of not less than \$2,000,000 and shall include contractual non-owned coverage (SEF 96)
- (e) Products and completed operations coverage
- (f) Broad Form Property Damage
- (g) Contractual Liability
- (h) Owners and Proponents Protective
- (i) The policy shall provide 30 days' prior notice of cancellation

Professional Liability Insurance

The Proponent 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 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 Proponent at the Proponent's sole expense.

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.

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 Proponents, which forms part of this bid document, for additional requirements.

The successful Proponent will be required to submit proof of Workplace Safety Insurance Board (WSIB) 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.

12. Conflict of Interest

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

13. Proof of Ability

The Proponent may be required to show, in terms of experience and facilities, evidence of its ability, as well as that of any proposed sub-proponent, to perform the work by the specified delivery date.

14. Document and Site Review

Not applicable.

15. Pricing Requirement

Prices shall be in Canadian Funds, quoted separately for each item stipulated.

All prices bid shall include applicable taxes, customs duty, excise tax, freight, insurance and all other charges of every kind attributable to the work.

Harmonized Sales Tax shall be shown as extra, unless otherwise specified. If the Proponent intends to manufacture or fabricate any part of the work outside of Canada, it shall arrange its shipping procedures so that its agent or representative in Canada is the Importer of record for customs purposes.

Except as may be provided in Part “C” Specifications, in the Proposal document, the prices bid shall not be subject to adjustment for any cost of the work to the Proponent.

In the event of any discrepancy between the unit price and the extension, the unit price shall govern.

16. Terms of Payment

The proposal is for a fee-for-service standing offer. The contractor shall provide an invoice specific to each unique file service is provided for, to the Town. The invoice shall be payable for 30 days from receipt of invoice. The effect of any alternative payment terms stated clearly in the bid submission will be

considered in the evaluation of bids. The Town shall have the right to withhold from any sum otherwise payable to the contractor such amount as may be sufficient to remedy any defect or deficiency in the work, pending correction of the same.

17. Delivery

Not applicable.

18. Patents and Copyrights

The Proponent shall at its expense, defend all claims, actions or proceedings against the Town based on any allegations that the work or any part of the work constitutes an infringement of any patent, copyright or other proprietary rights and shall pay to the Town all costs, damages, charges and expenses, including its legal fees.

The Proponent shall pay all royalties and patent license fees required for the work.

If the work or any part thereof is in any action or proceeding held to constitute an infringement, the Proponent shall either secure for the Town the right to continue using the work, or shall at the Proponent's expense, replace the infringing items with non-infringing work or modify them so that the work no longer infringes.

19. Assignment

The Proponent shall not assign the contract or any portion thereof without the prior written consent of the Town.

20. Occupational Health and Safety Act

The successful Proponent, for purposes of the Ontario Occupational Health and Safety Act, shall be designated as the Constructor for this project and shall assume all of the responsibilities of the Constructor as set out in that Act and its regulations. The foregoing shall apply notwithstanding that the successful Proponent has been referred to as the 'Proponent' in this and any other related document.

The Proponent acknowledges that he/she has read and understood the Occupational Health and Safety Act.

The Proponent covenants and agrees to observe strictly and faithfully the provisions of the said Occupational Health and Safety Act and all regulations and rules promulgated there under.

The Proponent agrees to indemnify and save the Town harmless for damages or fines arising from any breach or breaches of the said Occupational Health and Safety Act and/or the Town's Health and Safety Policies and Procedures.

The Proponent agrees to assume full responsibility for the enforcement of the said Occupational Health and Safety Act and the Town's Health and Safety Policies and Procedures and to ensure compliance therewith.

The Proponent further acknowledges and agrees that any breach or breaches of the Occupational Health and Safety Act and/or the Town's Health and Safety Policies and Procedures whether by the Proponent or any of its sub-Proponents may result in the Proponent and/or sub-Proponent being removed from the site and in the immediate termination of this contract herein and the forfeiture of all sums owing to the Proponent by the Town.

The Proponent shall allow access to the work site on demand to representatives of the Town to inspect work sites to ensure compliance with the Contract and the Town's Policies and Procedures.

The Proponent agrees that any damages or fines that may be assessed against the Town by reason of a breach or breaches of the Occupational Health and Safety Act by the Proponent or any of its sub-Proponents will entitle the Town to set-off the damages so assessed against any monies that the Town may from time to time owe the Proponent under this contract or under any other contract whatsoever.

Where any portion of the work or services in this Contract is contracted to a sub-Proponent, the Proponent agrees that the provisions of this section will apply to the sub-Proponent and the Proponent will enforce said provisions.

The Proponent shall provide a list of all controlled hazardous materials or products containing hazardous materials, all physical agents or devices or equipment producing or omitting physical agents and any substance, compound, product or physical agent that is deemed to be or contains a designated substance in accordance with the Workplace Hazardous Materials Information System (WHMIS) as defined under the Ontario Occupational Health & Safety Act and shall provide appropriate Material Health & Safety Data sheets for these substances used for the performance of the required work, all prior to the performance of said work.

Where hazardous materials, physical agents and/or designated substances are used in the performance of the required work, the Proponent shall ensure that the requirements of the Ontario Occupational Health & Safety Act and associated regulations are complied with.

The Town reserves the right to cancel any contract for non-compliance with the terms set out herein, health and safety regulations, the Environmental Protection Act, associated regulations and other applicable legislation.

21. Laws, Regulations, Permits, Fees and Licenses

The Proponent shall comply with relevant federal, provincial and municipal statutes, regulations and by-laws pertaining to the work and its performance. The Proponent shall be responsible for ensuring compliance by its suppliers and sub-consultants.

The contract shall be governed by and interpreted in accordance with the laws of the Province of Ontario.

The Proponent shall pay for all permits, licenses and fees, and give all notices and comply with all by-laws and regulations of the Town and any other governing body.

22. Substitutes and Alternates

Unless qualified by the provision "No Substitute", the use of the name of a manufacturer, brand, make or catalogue designation in specifying an item does not restrict Proponents to that manufacturer, brand, make or catalogue designation identification. This is used simply to indicate the character, quality and/or performance of the goods and/or services desired, but the goods and/or services on which bids are submitted must be of such character, quality and/or performance that it will serve the purpose for which it is to be used as well as that specified. In submitting a bid on goods and/or services other than as specified, the Proponent must furnish complete data and identification with respect to the alternate goods and/or services he/she proposes to furnish.

Consideration will be given to bids submitted on alternate goods and/or services to the extent that such action is deemed to serve the best interests of the Town. If the Proponent does not indicate that the goods and/or services he/she proposes to furnish is other than specified, it will be construed to mean that the Proponent proposes to furnish the exact goods and/or services as described in the bid document.

23. Quantities

Not applicable.

24. Samples

Not applicable.

25. Quotation/Tender/Proposal Procedures

Quotation/Tender/Proposal will be called, received, evaluated, accepted and processed in accordance with the Town's Purchasing Policies.

26. Contract Award

The Town reserves the right to award by item, or part thereof, groups of items, or parts thereof, or all items of the bid, and to award contracts to one or more Proponents submitting identical Bids as to price; to accept or reject any Bids in whole or in part; to waive irregularities and omissions. The Town also reserves the right to enter negotiations with the lowest compliant Proponent if the price bid is over the budgeted amount of the project. Should the Town be unable to reach an agreement with the lowest compliant Proponent, the Town reserves the right to enter negotiations with the next lowest compliant Proponent, or to cancel the call. If in so doing, the best interests of the Town will be served. No liability shall accrue to the Town for its decision in this regard.

The lowest or any bid may not necessarily be accepted as the Town of Carleton Place reserves the right to reject any or all bids. Bids shall be irrevocable for 90 days after the official closing time and the Town may at any time within that period without notice, accept a Bid whether any other Bid has been previously accepted or not.

All Bids are prepared at the sole risk and cost of the Proponents. No payments shall be made to any Proponent regarding the preparation and submission of Bids.

Award of this contract is subject to appropriate funding acceptable to the Town.

The notice of award to the successful Proponent shall constitute notice of acceptance of contract. This acceptance shall be conditional on the Proponent providing all documentation, security and certifications as required by the Bid Document within ten (10) working days of the date that the notice of award is delivered to the Proponent. The Proponent to whom the contract is awarded may

be required to execute a contract in duplicate within ten (10) working days from the date of notice of award by the Town.

Notwithstanding and without restricting the generality of the statements above, the Town of Carleton Place shall not be required to award or accept a tender, and may choose to either cancel the call for tenders or recall the tenders later:

- a) When only one Bid has been received as the result of a tender call;
- b) Where the lowest responsive and responsible Proponent exceeds the available project budget for the supplies or services;
- c) When all Bids received fail to comply with the specifications of the tender's terms and conditions;
- d) When a change in the scope of work or specifications is required

27. Contract Cancellation

The Town shall have the right, which may be exercised from time to time, to cancel any uncompleted or unperformed portion of the work or part thereof. In the event of such cancellation, the Town and the Proponent shall negotiate a settlement.

- a) If the Proponent commits any act of bankruptcy or if a receiver is appointed on account of its insolvency or in respect of any of its property or if the Proponent makes a general assignment for the benefit of its creditors, then, in any such case, the Town may, without notice, terminate the contract.
- b) If the Proponent fails to comply with any request, instruction or order of the Town or fails to pay its accounts or fails to comply with or persistently disregard statutes, regulations, by-laws or directives of relevant authorities relating to the work; or fails to prosecute the work with the skill and diligence or assigns or sublets the contract or any portion thereof without the Town's written consent or refuses to correct defective work or is otherwise in default in carrying out its part of any of the terms, conditions and obligations of the contract, then, in any such case, the Town may, upon expiration of ten (10) days from the date of written notice to the Proponent, terminate the contract.
- c) Any termination of the contract by the Town, as aforesaid, shall be without prejudice to any other rights or remedies the Town may have.
- d) If the Town terminates the contract, it is entitled to:
 - i. Take possession of all the work in progress and finish the work by whatever means the Town may deem appropriate under the circumstances;

- ii. Withhold any further payments to the Proponent until its liability to the Town is ascertained;
- iii. Recover from the Proponent loss, damage and expense incurred by the Town by reason of the Proponent's default (which may be deducted from any monies due or becoming due to the Proponent, any balance to be paid by the Proponent to the Town).

The Town shall not be liable to the Proponent for loss of anticipated profit on the cancelled portion or portions of the work.

28. Availability of Labour and Escalation

The Proponent shall fully inform himself regarding availability of labour in the area relative to the requirements of the schedule. The Proponent shall make his own assessment of escalation in costs and increased labour costs and include all these costs in his bid.

29. Correction of Defects

The Town reserves the right to review submitted work for accuracy, quality and consistency with local policy application. If submitted deliverables are found to be inaccurate, incomplete, unedited or otherwise unable to be published by the Town, the Proponent, upon request, shall make every effort to remedy the deliverable defects without additional cost of the Town.

30. Disclosure

Requests may be submitted to the Town for the results, and only the names of Proponents and total bid prices as read out at the Quotation/Tender opening, if applicable will be given in the reply.

Request for Proposals are not formally opened in public and only the name of the Proponents submitting responses to the Request for Proposal will be provided.

31. Freedom of Information

All information obtained by the Proponent in connection with this bid is the property of the Town of Carleton Place and must be treated as confidential. It may not be used for any purpose other than for replying to this bid, and for fulfillment of any subsequent contract. Any Proponent who requires that the information in its bid be kept confidential must explicitly advise the Town of that fact.

The Proponent may declare confidentiality of their bid; however, the Town is required by law to adhere to the requirements of the Municipal Freedom of Information and Protection of Privacy Act, as amended.

Personal information contained on this bid form is collected under the authority of Section 29(2) of the Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c.M.56 as amended and will be used to purchase goods and/or services and for the execution of contractual documents. If you have any questions about the collection, use or disclose this information by the Town of Carleton Place, 175 Bridge Street, Carleton Place, Ontario K7C 2V8 (613-257-6221).

32. Confidential Information

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

33. Complaints

Any complaint on the process and procedures as outlined in the Town's Purchasing By-law to define the procedures with respect to the procurement of goods and services by the Corporation of the Town of Carleton Place shall be in writing and shall be submitted to the Chief Administrative Officer for review and response.

A complaint on the process and procedures related to the award of a tender, proposal or quotation must be submitted within seven (7) working days of the award.

34. Accessibility

The Town of Carleton Place is committed to the accessibility principles of preventing and removing barriers in accessing goods and services for people with disabilities and is bound by the Standards under the Accessibility for Ontarians with Disabilities Act, 2005 as may be amended from time to time.

Regulations enacted under the Act apply to every designated public-sector organization and other third parties that provide goods and services to the members of the public.

The consultant/Proponent, and all sub-Proponents hired by the consultant/Proponent in the completion of its work, will meet or exceed compliance with all applicable regulations under the Accessibility for Ontarians with Disabilities Act, 2005 as may be amended from time to time.

The Proponent will be required to submit all versions of communications, reports, plans and drawings in accordance with Website Content Accessibility Guidelines 2.0, or as amended.

It is the consultant/Proponent's responsibility to ensure they are fully aware of and meet all requirements under the Act. A Declaration of Accessibility Compliance shall be required by the successful Proponent.

Part “C” Specifications

Introduction and Background

The Town of Carleton Place is 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 has an approximate area of 9 km² and an approximate population of 13,500 residents. The Town of Carleton Place is a fast-growing community which borders the nation’s capital. County population projections indicate that Carleton Place’s population is expected to increase to 25,000 by 2051.

The Town, a lower-tier municipal government, operates a Planning Department staffed by three (3) full-time equivalent employees: one (1) Director of Development Services (a Registered Professional Planner); one (1) Senior Planner (a Registered Professional Planner); and one (1) Planning Clerk and Administrator. In recent years, the Department has seen an increase in both the number of development inquiries and applications and the complexity of the files subject to review. Annual activity reporting is available on the Town’s website at www.carletonplace.ca.

The Planning Department provides application consultation and review services, master plan and policy development and inspection and enforcement of all matters considered by the Ontario Planning Act, RSO, 1990.

The Town makes use of a Community Planning Permit System (“The Development Permit By-law”) in lieu of a Zoning By-law, which was first adopted in 2003. The current in-use Development Permit By-law was adopted in 2015 and was repealed and replaced in 2025 but is subject to appeal. The appeal of the new By-law is anticipated to conclude in 2026. The Town’s current Official Plan was adopted in 2015 and was subject to Comprehensive Review in 2020.

In the next 5 years, the Planning Department will begin the development of at least two (2) Secondary Plans, a jurisdictional restructuring and annexation, updates to the Town’s existing Community Improvement Plan and a settlement boundary review. This increased policy development work will result in a need for staff to rely on additional contract planning services to support day-to-day application review.

Scope of Work

The Town of Carleton Place (the "Town") is seeking proposals from qualified Registered Professional Planners (RPP) or Planning Firms to provide Municipal Land Use Planning Services on a fee-for-service basis. The successful Proponent will function as an extension of the Town’s Development Services Department, providing application consultation, technical file review, and the preparing professional planning reports and recommendations.

The Services required have been categorized into three (3) primary phases:

Phase 1: Application Consultation (Pre-Consultation)

Upon assignment of a file by the Director of Development Services (or designate), the Proponent shall:

- **Pre-Consultation Meetings:** Chair or attend pre-consultation meetings with applicants and property owners to discuss development proposals.
- **Requirement Identification:** Identify all necessary technical studies, plans, and drawings required for a "Complete Application" (e.g., Stormwater Management, Traffic Impact Studies, Heritage Impact Assessments).
- **Preliminary Review:** Provide a preliminary assessment of the proposal's compliance with the Town's Official Plan and Development Permit By-law and identify the required application.
- **Process Guidance:** Advise the applicant on the legislative process, timelines, and fees associated with their specific application type (e.g., Development Permit, Plan of Subdivision, Official Plan Amendment).
- **Application Completeness:** Once the application has been submitted, review and advise the applicant of the completeness or identify any missing information for submission.

Phase 2: File Review and Technical Analysis

Once an application is deemed complete, the Proponent shall:

- **Circulation Management:** Assist Town staff in circulating the application to internal departments (e.g., Public Works, Building, Fire) and external agencies (e.g., Conservation Authority, County of Lanark, School Boards) for comment.
- **Technical Review:** Conduct a detailed review of the submitted planning rationale, concept plans, and supporting documents.
- **Issue Resolution:** Consolidate comments from agencies and the public; liaise with the applicant to resolve technical conflicts, By-law non-compliance, or design concerns.
- **Drafting Agreements:** Assist in the drafting and review of development agreements to ensure all planning conditions are captured.

Phase 3: Final Professional Planning Report & Deliverables

For every Class 3, or upgraded to Class 3 application, the Proponent shall deliver a Final Planning Report in accordance with the Town's staff report template. This report constitutes the professional opinion of the planner and shall include:

- **Background:** Include a clear statement of the purpose and effect of the application and a description of the subject lands.
- **Policy Analysis:** A detailed justification demonstrating how the proposal constitutes "Good Planning" and conforms to the PPS, County Official Plan, Town Official Plan and the Town's Development Permit By-law.
- **Public/Agency Consultation Summary:** A record of comments received during the public process and how those comments were addressed or mitigated.
- **Recommendation:** A clear, definitive recommendation to the Committee of the Whole (e.g., Approve, Approve with Conditions, or Refuse).

Ontario Land Tribunal (OLT) Support (Provisional)

In the event of an appeal to the Ontario Land Tribunal (OLT) regarding a file managed by the Proponent:

- The Proponent may be required to prepare witness statements.
- The Proponent may be required to attend hearings and provide expert witness testimony in support of the Town's position.
- **Note:** OLT services shall be treated as a separate task order and should be billed according to the hourly rates provided in the Financial Proposal.

Types of Applications

The Proponent should be prepared to manage the following application types:

- Class 1, Class 1A, Class 2 and Class 3 Development Permit Applications

Deliverables and Timelines

- **Accessibility:** All Reports shall be compliant with WCAG 2.0, as amended, standards.
- **Draft Reports:** Must be submitted to Town Staff for review at least six (6) business days prior to the agenda deadline.
- **Final Reports:** Must be submitted in digital format (PDF and editable Word Doc) by the agenda deadline set by the Clerk's Department.
- **File Management:** The Proponent shall maintain an organized digital file for each application using the Town's Microsoft Sharepoint system.

Electronic Access

Information and access that can be provided to the successful Proponent includes:

- Log-in access to the Town’s web-based ArcView GIS system;
- Access to the Town’s based e-permitting system;

Payment of Consulting Services

Payment shall be made based on detailed invoices, submitted on a monthly basis or as mutually agreed upon by both parties. Invoices shall clearly identify which file the work is attributed to (e.g. by civic address or application number).

Project Timing

The Town of Carleton Place has established the following timelines for the project:

ITEM	PROJECTED DATE
Request for Proposals Issued	By Monday, January 9, 2026
Inquiries due to Niki Dwyer (ndwyer@carletonplace.ca) by 11:00 a.m.	Wednesday January 21, 2026
RFPs due to Niki Dwyer (ndwyer@carletonplace.ca) by 11:00 a.m.	Friday, February 13, 2026
Selection of Successful Firm	By February 17, 2026
Contact Begins	March 16, 2026 (latest)
Contract Ends	December 31, 2026

Submission Details

Submissions shall include the following:

- Proposals shall detail the Proponent’s understanding of the requirements and acknowledgement of the required deliverables, the proposed method of work and the work plan with time schedule.
- The submission shall include an agreement to undertake the full scope of work
- Identification of the individual(s) who will complete the scope of work, and a description of their experience related to the scope of work.

The submission shall include a demonstrated understanding of the scope and particulars of the assignment. It is recommended that your submission not exceed three (3) single-sided letter size pages and minimum 12-point font. Attachments such as resumes and required acknowledgements, if applicable will not be included in the page count.

The following documents forming part of the Request for Proposal (RFP) shall 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 in the document which appears first on the list shall take precedence:

- Request for Proposal
- Part “B” Standard Terms and Conditions
- Part “C” Specifications
- Part "D" Bid Form
- Part “E” Financial Proposal

NOTE: Additional work not noted above that may be recommended by the Proponent as part of the work program, shall be included as a separate component of the submission

Part "D" Bid Form

The Corporation of the Town of Carleton Place

**175 Bridge St.,
Carleton Place, Ontario
K7C 2V8**

Proposal No. DS-01-2026

Request for Proposal

Professional Services

Municipal Land Use Planning

Documents to Be Attached with This Bid Form

- ☐ One attachment containing the proposal with no pricing information and a second containing only your pricing. Please ensure your attachments are labeled clearly.
- ☐ Insurance Certificate (upon award)
- ☐ WSIB Certificate (upon award)

Proponents Information Form

Proponents shall complete this form and include it with the Bid Submission.
Please ensure all information is legible.

1.	Proponent's/Company Name	
2.	Proponent's Main Contact	
3.	Address (incl. Postal Code)	
4.	Office Phone #	
5.	Toll Free #	
6.	E-mail address	
7.	HST Account #	

Acknowledgement of Receipt of Addenda

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

Addendum #

Date Received

☐

Check here if No Addenda received.

Respondent

Signature

Date

Representation, Warranty and Acknowledgement Regarding Accessible Customer Service Training

Representation and Warrant

(Insert Proponent Name) _____

Hereby represents and warrants that:

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 for Professional Services in Municipal Land Use Planning.

1. The Accessible Customer Service Training provided shall 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.

Proponent Name

Signature(s)

PRINT NAME

PRINT TITLE

Signature(s)

PRINT NAME

PRINT TITLE

Date

I/WE HAVE THE AUTHORITY TO BIND THE PROPONENT

Part “E” Financial Proposal

Basis of Payment:

The Proponent offers to provide the services detailed herein under Parts A, B, C and D, and as further detailed in the Proponent’s proposal, to the acceptance of the stated Contract Authority for the following Total Upset Limit Price.

Hourly Rates:

Name/Position	Hourly Rate

Per Diem Rates (if applicable):

Name/Position	Per Diem Rate

Disbursements:

Type	Explanation / Rate

Proponents should note the following when preparing their financial proposal:

Disbursements:

All reasonable and proper expenses incurred 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 costs

To the Corporation of the Town of Carleton Place, Hereafter called the "Town":

I/We_____the undersigned declare:

1. That the several matters stated in the said Bid are in all respects true accurate and complete.
2. That I/we have read and fully understand all information, terms and conditions contained within the Bid Document, including: Part "A" Information to Proponents; Part "B" Standard Terms and Conditions; Part "C" Specifications and Part "D" Bid Form.
3. That I/we do hereby Bid and offer to enter into a Contract to Supply and Deliver all materials mentioned and described or implied therein including in every case freight, duty, currency exchange, H.S.T. in effect on the date of the acceptance of bid, and all other charges on the provisions therein set forth and to accept in full payment therefore, in accordance with the prices and terms set forth in the Bid herein.
4. That this Bid is irrevocable for Ninety (90) Days and prices for as long as stated elsewhere in the Bid Document, and that the Town may at any time within that period without notice, accept this Bid whether any other Bid has been previously accepted or not.
5. That the awarding of the Contract, by the Town is based on this submission, which shall be an acceptance of this Bid.
6. That if the Bid is accepted, I/we agree to furnish all documentation, security and certifications as required by the Bid Document and to execute a formal contract in triplicate, if required, within 10 Working Days after notification of award. I/We understand that any acceptance by the Town is fully conditional upon the receipt of said documentation, security and certifications by the Town within 10 Working Days. If I/we fail to do so, the Town may accept the next lowest or any Bid or advertise for new bids, or to carry out completion of the works in any other way they deem best.
7. That I/we agree to save the Town, its agents, or employees, harmless from liability of any kind for the use of any composition, secret process, invention, article or appliance furnished or used in the performance of the Contract of which the Proponent is not the patentee, assignee, or licensee.

The undersigned affirms that he/she is duly authorized to execute this bid.

Proponents Signature and Seal: _____

Position: _____

Witness: _____

Position: _____

(If Corporate Seal is not available, documentation should be witnessed)

Dated at the _____ of _____
(Town/City)

this _____ day of _____ 2026.

Part “F” References

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