



PORT COLBORNE

PROJECT NO. 2021-43
REQUEST FOR PROPOSAL

Affordable Housing Strategy and Action Plan

Mayor: William Steele

CAO: Scott Luey

City Clerk: Amber LaPointe

Closing Date & Time: January 19, 2022

2:00 p.m. local time

Document Release Date: December 14, 2021

Attn: Amber LaPointe, City Clerk

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Type: Request for Proposal

Title: Affordable Housing Strategy and Action Plan

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DEFINITIONS

The following definitions apply to the interpretation of this document.

1. "ADDENDUM" or "ADDENDA" means a written change, addition, alteration, correction or revision to a bid, proposal or contract document. Addendum/Addenda may be issued following a pre-bid/pre-proposal site meeting or as a result of a specification or work scope change to the solicitation.
2. "AGREEMENT" means a legal document that binds the Corporation of the City of Port Colborne and the Successful Proponent to carry out a project.
3. "AUTHORIZED AGENT" is a representative of the Successful Proponent who has the authority to enter into an agreement to carry out a project.
4. "AWARD" is the acceptance of a Proposal in accordance with this Request for Proposal (RFP).
5. "BUSINESS DAY" means any day from Monday to Friday between the hours of 8:30 a.m. and 4:30 pm, excluding statutory or civic holidays observed by the City of Port Colborne.
6. "CONSULTANT" means the provider of a service who, by virtue of professional expertise or service, is contracted by the City of Port Colborne to carry out a project.
7. "CONTRACT" means a legal document and any attachments that bind the Corporation of the City of Port Colborne and all other parties.
8. "CONTRACT DOCUMENTS" means a form of agreement, together with the standard conditions, specifications and appendices, if any, which constitute the entire understanding between the City and the Successful Proponent regarding the project.
9. "DISCRETIONARY" refers to a requirement that the City of Port Colborne would find valuable and consider desirable for the proposed project. Instructions and specifications that contain words like "may" are discretionary and should be responded to in the proposal indicating they are or are not part of the Proposal.
10. "INSURANCE CERTIFICATE" is a certified document issued by an insurance company licensed to operate by the Government of Canada or the Province of Ontario certifying that the Proponent is insured in accordance with the City's requirements.
11. "MANDATORY" refers to a specification or requirement that the Proponent must include in their Proposal and be capable of performing if they are awarded the contract to carry out the project. Instructions and specifications that are requested by the words "shall" and/or "will" indicate the requirement is mandatory.

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12. "MAY" is used in this document to denote permissive action.
13. "PROPONENT" refers to any legal enterprise making a submission in response to this RFP.
14. "PROPOSAL" is a written offer, received from a person/company in response to an invitation to provide goods and/or services based on a Request for Proposal and the corresponding Terms of Reference.
15. "PROPOSED FEE" means the fee estimated by the Proponent to complete the project.
16. "REQUEST FOR PROPOSAL" (RFP) means the document issued by the City of Port Colborne and used to solicit proposals from Proponents to provide goods, services or construction to the City, where it is not practical and/or possible to prepare precise specifications, or where alternatives to detailed specifications will be considered, which may be subject to further negotiation.
17. "SHALL" and "WILL" are used in this document to denote imperative action.
18. "SUCCESSFUL PROPONENT(S)" means a Proponent(s) whose submission(s) has been accepted by the City.

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1.0 General Background

The Terms of Reference describes the Corporation of the City of Port Colborne's requirements for the consulting services required to provide a sufficient range of affordable housing options and opportunities in Port Colborne.

2.0 Community Background

The City of Port Colborne (2016 population 18,306) is a lower-tier municipality on Lake Erie, at the southern end of the Welland Canal, in the Niagara Region of southern Ontario, Canada. The community was first formed in 1832 and incorporated in 1870 (village) and 1966 (city). In 1970, Niagara Region municipal restructuring added Humberstone Township, which further expanded the city. The City is one of 12 municipalities that constitute the Regional Municipality of Niagara. It shares its boundaries with the Township of Wainfleet to the west, the Town of Fort Erie to the east, and the City of Welland and City of Niagara Falls to the north.

Historically, the City has benefited from its proximity to large population centres in Southern Ontario and the Northeast United States and its strategic location on the Welland Canal and Lake Erie. It is recognized as part of the Niagara Gateway Economic Zone and the province's A Place to Grow plan for the Greater Golden Horseshoe. As one of several Niagara municipalities in a designated Foreign Trade Zone, the City is an important link in the chain of trade between Canada and the United States.

The urban areas of Port Colborne are centred around both (east and west) sides of the Welland Canal and consist of a variety of residential neighbourhoods, a historic downtown core, as well as various commercial and industrial lands. These areas make up less than one-quarter of the municipality's geographic territory. Across its rural expanse, there are active agricultural lands, hamlets, aggregate resource areas, and a handful of estate residential developments.

3.0 Project Objectives & Deliverables**Project Overview**

Intertwined with the City's priorities of economic development and goals for future prosperity is the challenge of bettering community quality of life. To make progress on this front, a long-term action plan is needed to improve access to affordable housing that encompasses the entire housing spectrum. The desired outcome of the action plan will be a future where every person in Port Colborne has access to housing that is not only affordable but also suitable, stable, and safe. The benefits of achieving this vision are projected to lead to improvements in related socio-economic conditions like poverty, employment and income, education, and health.

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The City does not offer community services, administer shelter services, or act as a housing provider. Instead, it is the City's responsibility to ensure that planning tools are made available to support affordable housing and that municipal policy is consistent with regional and provincial direction. Therefore, solutions for addressing affordable housing issues must align with all levels of government in order for them to be effective.

The objective of the 10-year (2022-2032) Affordable Housing Strategy and Action Plan is to comprehensively address how and to whom to provide a sufficient range of affordable housing options and opportunities in Port Colborne.

Project Scope**Review Team**

The Consultant will convene a start-up meeting with the City's Project Review Team (PRT) and hold monthly meetings. As part of these monthly meetings, the Consultant will attend and present information with regard to the ongoing consultation, preparation and presentation of the draft and final Affordable Housing Strategy and Action Plan. The PRT will provide ongoing input as policies and schedules are developed. The PRT may consist of the following City staff members:

- Manager of Strategic Initiatives – Gary Long
- Economic Development Officer – Bram Cotton
- Planning Consultant – Rick Brady
- Tourism Coordinator/Special Projects – Greg Higginbotham

Deliverables

Provide at least one hard copy of all prepared material, electronic versions of all reports, maps, presentations, etc. in the following formats:

- Written Reports (MS Word and PDF)
- Presentations (MS PowerPoint and PDF)

The Consultant will also provide all presentation materials for required meetings, including presentation boards, in advance of these meetings.

Background Information, Collection & Review

The Consultant will prepare the following components:

i. Literature Review

- a. Niagara Official Plan – The Regional Municipality of Niagara (the "Region") receives high level policy direction from the Province and the acts as a service manager for the

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provision of social and affordable housing across 12 municipalities. Although the Region is currently in the process of creating a new Official Plan, updated and consolidated policy reports on housing are to be studied and utilized. These reports will establish the background and regional context for Port Colborne’s affordable housing implementation plan. Once the new Official Plan is approved and released, it should be thoroughly examined for its implications on affordable housing.

- b. Niagara’s 10-Year Housing and Homelessness Action Plan – This plan provides a framework for integrated local planning to address housing affordability, coordination of homelessness and related support services and homelessness prevention. It too should be studied and utilized in order to align Port Colborne’s implementation plan with the actions, outcomes and targets set by the Region.

ii. Needs & Supply Analysis

- a. Analyze economic and demographic data from applicable sources to profile the current and future needs for housing among groups facing the biggest affordability challenges (e.g., multiple-family, couples with children, couples without children, lone-parents, singles, seniors, Indigenous, newcomers and refugees, persons with a disability, persons with a developmental disability, and persons with complex needs) within the Port Colborne population. A focus on income levels (by deciles) relative to monthly housing costs (by type) should be taken.
- b. Analyze current and historical datasets to provide information about the existing housing stock in Port Colborne by type (e.g., ownership, private market rentals, non-profit rentals, emergency, transitional, cooperative, supportive, secondary suites, congregative living, etc.). Research, examine, and synthesize information on the key trends, issues or barriers that have impacted and presently impact the supply of affordable housing in Port Colborne. A full review and analysis of existing City policy (i.e., Official Plan and amendments) with respect to planning and development is expected.
- c. Over a 10-year period, forecast the rate of housing need in relation to regional and provincial population growth trends and calculate the magnitude of the shortfall or oversupply for different housing types. Give consideration to existing and proposed housing developments in Port Colborne.

iii. 10-Year Strategy & Action Plan

The 10-year (2022-2032) Affordable Housing Strategy and Action Plan should ultimately be a tool to guide City Council, staff, local decision-makers, and community stakeholders towards achieving the goal of improving access to affordable housing. It will include, but not be limited to, the following:

- Outline strategies to create housing partnerships with private developers and non-profit community organizations;

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- Present strategies to incentivize the provision of mixed (medium to high) density and mixed-income housing;
- Develop construction priorities and timelines to increase and diversify housing stock (across the entire housing spectrum);
- Recommend proactive measures to maximize the productivity and availability of Port Colborne’s existing housing stock;
- Provide zoning and Official Plan policy recommendations that would allow for the development of different housing types and the flexibility in where such housing is built;
- Set annual housing targets (by number of units) that minimize overall levels of housing need and keep pace with future population growth;
- Identify policy decisions, initiatives, and priorities that are not outlined herein but considered important and necessary to achieve the overall objective; and,
- Outline provincial and federal affordable housing funding programs that should be pursued to support the action plan and any financing strategies.

4.0 Project Management

The agreement for this project will be between the Successful Proponent and the City of Port Colborne. It will be the responsibility of the Successful Proponent to prepare said agreement.

The lead contact person and Project Manager for the City will be Gary Long, Manager of Strategic Initiatives. The Consultant will also assign a lead contact person who bears responsibility for undertaking the project.

Any change in the Successful Proponent’s assigned staff or lead contact person shall be approved by the City’s Project Manager in advance.

No direction impacting the scope of work shall be considered unless it is received in writing and approved by the City’s Project Manager.

5.0 Submission

The Proposal should include items listed hereunder, but also include other considerations based on the Proponent’s understanding of the project. The Proponent is also requested to propose a work plan and timeline that addresses the tasks outlined in this RFP.

Proponents are requested to adhere strictly to the instructions concerning submission. The following policy regarding the submission and opening procedures will be applicable.

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Four copies of the Proposal must be sealed and submitted to the following person by the following date and time:

Amber LaPointe, City Clerk
Second Floor, City Hall
66 Charlotte Street
Port Colborne, ON L3K 3C8

January 19th, 2022 at 2:00 p.m. local time

Proposals received later than the time specified will not be accepted, regardless of the postal seal date. Proposals must be plainly marked to reveal the contents and the submitter's name and address. Proposals received after this time will not be opened and returned to the sender.

Proposals shall be submitted in envelopes with information on the front (Attachment G) as follows:

- Envelope #1 – Proposal including all items listed below under section 6.0. Proposal (including addenda if applicable). An electronic copy of all files included in this envelope can be provided on a USB or memory stick.
- Envelope #2 – Proposal with Summary of Consulting Fees & Disbursements (Attachment B)

If the Proponent needs clarification of the specifications, they should not use envelopes as they will not be opened prior to the evaluation process.

The proposal must be legible, written in ink, or typewritten. Any form of erasure, strikeout or over-writing must be initialed by the Proponent's authorized signing officer.

All unit prices must be clearly indicated, and all extensions written in figures. The Proposal must not be restricted by a statement added to the Proposal Summary, a covering letter or alterations to the Proposal Summary as supplied by the City of Port Colborne, unless otherwise provided herein.

The key contact for inquiries regarding this RFP is as follows, and any inquiries must be submitted by email only.

Gary Long
Manager of Strategic Initiatives
gary.long@portcolborne.ca

All Proponents intending to submit a Proposal are advised to register their intention to the

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above key contact to ensure access to clarifications and addendums.

Proponents may, reasonably in advance of the closing date and time, inquire into and seek clarification of any requirements of this RFP. Inquiries must be directed to the attention of the key contact.

City staff may clarify any aspect of a Proposal submission with the Proponent at any time after the Proposal has been opened. Any such clarification will not alter the Proposal and will not constitute a negotiation or renegotiation of the Proposal. The Corporation of the City of Port Colborne is not required to clarify any part of a Proposal. Any clarification of a Proposal by a Proponent shall not be effective until confirmation has been delivered in writing. No oral interpretations will be effective to modify any provisions of the Proposals.

Any Proponent finding discrepancies or omissions in the RFP documents or having any doubts concerning the meaning or intent of any part thereof should immediately request clarification. Written instructions or explanations will then be sent to all Proponents in the form of Addenda. Any Addendum is the responsibility of the Proponent. The Proponent must ensure that all applicable Addenda are contained in Envelope #1 prior to submission.

It will be the responsibility of the Proponent to clarify any details in question before submitting their Proposal. No inquiries will be taken on the closing date.

The Proponent shall note that all elements which may be listed as provisional shall be included in the price (Attachment B). However, these elements will be used at the City's discretion, pending budget, and no penalty for non-usage shall be applicable.

Proponents will be required to provide pricing on all provisional items. Provisional items will be noted as such.

6.0 Proposal

Submissions are restricted to those consulting firms that can demonstrate qualifications and experience in strategy formulation, in-depth knowledge of affordable housing and completion of a project of this nature within the last 5 years for a municipality or jurisdiction of comparable (or greater) population in Canada.

Consultants shall provide a brief Proposal (maximum 15 pages), not including the covering letter, résumés, company credentials, content page and appendices. Appendices are to be limited to résumés, project lists and corporate information.

The Consultant's Proposal will include:

- At least three (3) letters of reference of similar work experience. Each reference letter submitted shall have varied content in order to illustrate the Proponent's understanding of the various requirements of the Proposal. It shall also include all applicable contact information, as this will be a key component in the qualification of a

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Consultant. Proponents not fulfilling this key component will be scored 0 on Attachment E of the Consultant Evaluation.

- The Consultant’s interest in the project and an understanding of the objective(s) of this project, as well as any relevant local expertise shall be referenced.
- The Consultant’s proposed methodology for carrying out the work.
- A detailed work plan, timeline and weekly project schedule presented in a calendar-style format and based on the fixed schedule provided by the City (Attachment A). The work plan, timeline and schedule will identify all major components of this project and their anticipated start and completion dates, which must coincide with the dates provided by the City. The Consultant will meet all work program commitments, times and completion dates as agreed upon by the City and the Consultant, unless both parties agree to appropriate revisions to the agreement due to unforeseen circumstances. Any overruns in timing or cost, unless otherwise agreed upon, will not be the responsibility of the City of Port Colborne.
- A description of the consulting team, the lead person and the relevant experience and qualifications of each individual, along with an estimate of the percentage of time each team member will dedicate to this project (i.e., the individual’s hours divided by total project hours). Also, the location where the consulting team members reside will also be considered when reviewing local expertise.
- Identification of all sub-consultants, their qualifications and experience, as well as their specific role and commitment (i.e., time and resources) to the project.
- Disclosure of any perceived conflict of interest (Attachment F).
- Project History for the past three years and the current status of these projects as they pertain to the Consultant’s project team members (Attachment H).
- A complete cost breakdown for the project presented in a tabulated format in cumulative hours, with a total upset cost for completion and presentation of the final report. The cost estimate of the Proposal shall be submitted in Envelope #2.
- All reports, plans, drawings, specifications, designs, construction data and documents prepared by the Consultant shall be and remain the property of the City.

7.0 Budget

Proponents shall stipulate a fixed price to perform the project as outlined herein. The price stipulated will be inclusive of all labour, materials, equipment, travel, accommodation, meal, parking and incidental expenses incurred by the respondent in the performance of this project. The contract for this project will be determined by a bid process and will be a fixed

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price contract. Quotes must clearly indicate sales tax as a separate line item.

Proponents are required to provide an outline for the estimated number of consulting days as well as the estimated number of days for each member of the consulting team involved in the project.

A payment fee schedule will be determined with the Consultant dependent on mutually agreed upon milestones. At least 25% of the budget will be withheld until delivery of the final report and corresponding presentation in a form acceptable to the City. The Consultant must submit an invoice to the City outlining items that are being billed for (e.g., hours, travel, etc.). Upon receipt and verification of the invoice, payment will be issued.

The project will be awarded through a competitive process and subject to budget and Council approval as per the City's purchasing policy.

8.0 Project Cost & Man-Hour Estimate

In the Proposal, the Consultant will provide the overall project cost breakdown and include the following:

- Fee schedule of hourly or per diem rates for each member of the consulting team and any sub-consultant(s) (Attachment C).
- A detailed time and cost breakdown of the workload (i.e., by staff and man-hours).
- Disbursement costs, which may include mileage, telephone charges, printing and reproductions, fax charges, courier services, computer services, etc.
- Compliance with the City's insurance requirements as indicated in Attachment D.
- A summary of consulting fees and disbursements as illustrated in Attachment B.

The Consultants shall note that the City of Port Colborne will consider the estimated total consulting service fees for this project as an upset limit based on the work plan and the assumed project duration, and it will not consider extra items unless prior written approval has been obtained.

The Proposal shall warrant that the costs quoted for services in response to the RFP are not in excess of those which would be charged to any other individual or entity for the same services performed.

9.0 Obligations of The Parties

The following items are general obligations of the Consultant and City:

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- Submission of a Proposal does not obligate the City of Port Colborne to acceptance and, as such, the City of Port Colborne reserves the right to accept or reject any Proposal based on technical merit, interpretation of this Request for Proposal, cost effectiveness, timeliness, etc.
- Acceptance of any Proposal will be subject to approval by the Council of City of Port Colborne. The selected Consultant will be required to enter into a written agreement with the City of Port Colborne before commencement of the project. It shall be the responsibility of the Consultant to prepare said agreement.
- All Proposals will be subject to an evaluation process by City staff, which will consider such items as professional expertise, experience and previous project performance (Attachment E).

10.0 Proposal Evaluation

All Proposals will initially be reviewed and assessed based on non-cost criteria. Subsequently, some Proposals may be evaluated further to assess costs before a preferred Proposal is determined. See Attachment E for Evaluation Sheet and 19.0 Evaluation and Selection of Proponents.

11.0 Confidentiality

The City of Port Colborne will treat all bids as confidential. The City will comply with the Municipal Freedom of Information and Protection of Privacy Act, and its retention by-law pursuant to the Municipal Act, in respect of all bids. All reports approved by the Council of the City of Port Colborne will become public information. These reports will not include bid documents. The City will retain all copies of all bids, successful or otherwise, and they will be destroyed in accordance with the City’s Retention By-Law.

12.0 Informal/Incomplete Proposals

Proposals shall be rejected as informal/incomplete for any of the following reasons:

- a) Late
- b) Incorrect Fee/Schedule Breakdown document
- c) Incorrect/Missing envelopes
- d) Incomplete documentation
- e) Missing/Incomplete Addendum
- f) Proposal not signed and/or sealed
- g) Proposal completed in pencil
- h) Erasures, overwriting or strikeouts not initialed
- i) Proposals submitted by fax or email

13.0 Proponent Performance (Litigation)

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The Corporation may, in its sole discretion, reject a Proposal if a Proponent:

- i. Has, at any time, threatened, commenced or engaged in legal claims or litigation against the Corporation of the City of Port Colborne.
- ii. Is involved in a claim or litigation initiated by the Corporation.
- iii. Previously provided goods or services to the Corporation in an unsatisfactory manner.
- iv. Has failed to satisfy an outstanding debt to the Corporation.
- v. Has a history of illegitimate, frivolous, unreasonable, or invalid claims.
- vi. Provides incomplete, unrepresentative or unsatisfactory references.
- vii. Has engaged in conduct that leads the Corporation to determine that it would not be in the Corporation's best interests to accept the Proposal.
- viii. Has a conflict of interest or that which may be viewed as a conflict of interest either with or by the Corporation.

Proponent's must sign and submit the Litigation & Conflict of Interest Statement (Attachment F).

14.0 Exclusion

Except as expressly and specifically permitted herein, no Proponent shall have claim for any compensation of any kind whatsoever as a result of participating in this Request for Proposal. By submitting a Proposal, each Proponent shall be deemed to have agreed that it has no claim.

15.0 Negotiations

If all Proposals are over budget, the City reserves the right to negotiate the terms of the contract, including price and scope of work, directly with the Successful Proponent.

Negotiations will identify cost saving opportunities associated with an alternate process of project delivery. If an acceptable agreement cannot be met with the Successful Proponent, the City reserves the right to negotiate an acceptable contract with the next qualified Proponent.

If an agreement cannot be reached that is acceptable to the City, the project will be cancelled without award. The City further reserves the right, in its sole discretion, to cancel the contract at any time without an award being made.

16.0 Terms of Reference

A detailed Proposal with recommendations, as outlined in 3.0 Project Objectives & Deliverables, shall be prepared for submission to the Project Manager and contain:

- Detailed and specific recommendations that can be acted upon by the City.

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- Content that is user-friendly and easily understood yet technical enough for implementation.
- Meeting minutes after each meeting with staff and any other interested parties. These minutes will be responsibility of the Successful Proponent and should be submitted to the City for review and approval within one week of the meeting date.
- Final submission of reports, drawings and presentations in Microsoft Word, Excel PowerPoint and/or PDF. Ownership of both hard copies and digital copies must be transferred to the City upon completion of the project. Metric units are to be used.

The City will prepare all required mapping for the CIP project.

17.0 Acceptance or Rejection of Proposals

The City of Port Colborne reserves the right to discuss any and all Proposals, request additional information from the Consultants and accept or reject any or all Proposals, whichever is in the best interest of the City.

All Proposals will be subject to an evaluation process.

An award will be made to the Successful Proponent, which, in the opinion of the City, is best qualified to meet the City's requirements. The City will not be required to justify its decision to those consulting firms not selected. The City will not be liable for any costs incurred by the consulting firms in the preparation of their Proposals.

The City may, at any time and at any stage of the undertaking, provide the Successful Proponent with written notice suspending or terminating the Consultant's services or any portion thereof.

Upon receipt of such written notice, the Successful Proponent shall perform no further services other than those reasonably necessary to close out the project. In such event, the Successful Proponent shall be paid by the City for all services performed and all disbursements incurred pursuant to this agreement and then remain unpaid as of the

effective date of such termination.

If the City is in default in the performance of any of the City's obligations set forth in this agreement, then the Successful Proponent may, by written notice to the City, require such default be corrected. If, within thirty (30) days of receipt of such notice, such default shall not have been corrected, the Successful Proponent may immediately terminate this agreement. In such event, the Successful Proponent shall be paid by the City for all services performed and all disbursements incurred pursuant to this agreement and then remain unpaid as of the effective date of such termination.

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No activities or services included as part of this RFP may be subcontracted to another organization, firm, or individual without the approval of the City of Port Colborne. Such intent to subcontract should be clearly described in the Proposal and the names of subcontractors/-ed firms must be provided. It is understood that the subcontractor/-ed firm is held responsible for the satisfactory completion of the service or activities included in the subcontract.

Any consortium of companies or agencies submitting a Proposal must certify that each company or agency of the consortium can meet the requirements set forth in the RFP.

18.0 RFP Schedule

RFP Issued	December 14, 2021
Deadline for questions	January 13, 2022
Deadline for staff response to questions	January 14, 2022
Submission of Proposals	January 19, 2022
Staff Review Proposals	January 31, 2022
City Council awards contract	February 22, 2022
Project Start-up	February 23, 2022

Project Schedule

Project performance and completion based upon the following schedule.

ITEM	DUE DATE
Project Start-up	February 23, 2022
Interim Report	TBD
Draft of Final Report Submission to City Staff	TBD
Final Report Submission to City Staff	TBD
Presentation to City Council	TBD

19.0 Evaluation of Proponents

Objectives

The objective of the Evaluation and Selection Process is to identify the Proposal that effectively meets the requirements of this RFP and provides the best value to the City.

The City of Port Colborne has established the following general criteria:

- Demonstrated knowledge of affordable housing, best practices, emerging trends, strategies, policies, funding and program administration;
- Understanding of the objectives of the City of Port Colborne;

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- Proven experience in conducting broad-based community consultations through various formats;
- Proven ability to meet, either in-house or through sub-consultants, the project requirements on schedule and within budget;
- Proven ability to provide creative initiatives and solutions; and,
- Prior experience in completing similar projects.

Evaluation Team

An evaluation committee will evaluate the Proposals. The evaluations will be conducted using pre-determined criteria set out in this RFP. The City reserves the right to have a third party, subject to strict confidentiality obligations, review the Proposals to support and advise the Evaluation Committee as necessary.

Evaluation & Selection Criteria

The Proposal evaluation process will be comprised of the following stages:

- Stage 1: Evaluation of Mandatory Criteria
- Stage 2: Evaluation of Technical Criteria
- Stage 3: Reference Checks of Short-Listed Proponents
- Stage 4: Evaluation of Cost Criteria

Stage 1 - Evaluation of Mandatory Criteria

Proposals that do not meet the mandatory criteria will be rejected without further evaluation.

Stage 2 - Evaluation of Technical Criteria

Subject to the Evaluation Committee’s right to reject an unacceptable Proposal under the mandatory submission criteria, the Committee will evaluate and score each Proposal. Points will be awarded on the basis of the extent to which the requirements of the RFP are satisfied, as well as the merit of the individual Proposal as compared to other Proposals.

Stage 3 - Reference Checks of Short-Listed Proponents

The Evaluation Committee may consult with the references of the short-listed Proponents. Based on the feedback from references, the technical ratings may be adjusted.

Stage 4 - Evaluation of Cost Criteria

Evaluation of cost criteria will be conducted after evaluation of the technical criteria and references checks have been performed.

Additional Information

The Evaluation Committee may, at its discretion, verify and make inquiries with respect to

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references given by a Proponent, and request clarifications or additional information with respect to any Proposal. The Evaluation Committee may make such requests only to selected Proposals and without making the same requests for all Proposals. The Evaluation Committee may consider such clarifications or additional information in evaluating a Proposal.

Selection

The Evaluation Committee will rank the proposals and select the Successful Proponent.

Value-Added Services

Should their consulting firm be awarded the contract, the Successful Proponent will indicate any value-added services or items that can be included or made available to the Corporation and that would not be an additional cost to the Corporation.

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Attachment A - Schedules

The following dates listed are ones that will move this project forward. Should the Consultant wish to alter the schedule, it should be noted below with an explanation for the change in timing. Bear in mind that any change to the schedule may affect the total score.

SCHEDULE	
RFP Closing Date	January 19, 2021
Staff Report to Council and Award of RFP	February 22, 2022
Project Start-up	February 23, 2022
Interim report	TBC
Draft of Final Report Submission to City Staff	TBC
Final Report Submission to City Staff	TBC
Presentation to City Council	TBC

Consultants revised schedule if necessary:

SCHEDULE	
RFP Closing Date	
Staff Report to Council and Award of RFP	
Project Start-up	
Draft Report Submission to City Staff	
Final Report Submission to City Staff	
Presentation to City Council	

Explanation of changes in schedule:

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Attachment B - Summary of Consulting Fees & Disbursements

Excluding HST

Project: _____

Consulting Firm: _____

Professional Liability Insurance: \$_____ Expiry Date: _____

Comprehensive Liability Insurance: \$_____ Expiry Date: _____

Automobile Insurance: \$ _____ Expiry Date: _____

- | | | |
|----|----------------|----------|
| 1. | Consulting | \$ _____ |
| 2. | Disbursements | \$ _____ |
| 3. | Payroll Burden | _____ % |

Total: \$ _____

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Attachment C - Fee Schedule and Cost Breakdown

Fee Schedule and Cost Breakdown (example)

Project:																
Consulting Firm:																
Activity	Staff	Labour				Costs								Total	Total Phase	
	Fee Hr.					Total Hours	Sub-Consultant	Equipment	Inspection	Other	Disbursement					
											Computer	Mileage	Report			Other \$

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Attachment D - Insurance Requirements

The City of Port Colborne's insurance requirements for Consultants are described below. The coverage provided by these policies shall not be changed or amended in any way or cancelled by the Consultant unless approved by the City in writing.

Comprehensive General Liability and Automobile Insurance

The Consultant shall provide the City of Port Colborne with a certified copy of Third-Party Liability in a form satisfactory to the City Solicitor as follows:

- Policy to be written on the comprehensive form including Contractual Liability and Complete Operations with an inclusive limit of not less than two million dollars (\$2,000,000.00) Bodily Injury and Property Damage with a deductible not greater than five thousand dollars (\$5,000.00). The Liability Insurance Policy shall not contain any exclusions of liability for damage, etc., to property, building or land arising from the removal or weakening of support of any property, building or land whether such support be natural or otherwise.
- Standard Automobile Policy on both owned and non-owned vehicles with inclusive limits of not less than two million dollars (\$2,000,000.00) Bodily Injury and Property Damage with a deductible not greater than five thousand dollars (\$5,000.00).
- A "Cross Liability" clause or endorsement.
- An endorsement certifying that the City of Port Colborne is included as an additional named insured.
- An endorsement to the effect that the policy or policies will not be altered, cancelled or allowed to lapse without thirty (30) days prior written notice to the City.
- The Insurance Coverage shall be in the minimum amount of two million dollars (\$2,000,000.00). The Consultant shall provide to the City proof of Professional Liability Insurance carried by the Consultant.

Project No.: 2021-43

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Attachment E - Consultant Evaluation

	ITEM/FACTOR	WEIGHTING	COMPANY 1 (1 – 10)	WEIGHTED SCORE	COMPANY 2 (1 – 10)	WEIGHTED SCORE
1.	Applicable Technical Expertise and Experience	25				
2.	Project Understanding	20				
3.	Methodology (Work Plan, Innovation, Client Administrative Input, Workload, etc.)	20				
4.	Value Added	5				
5.	Project History	10				
6.	Cost Factor	15				
Sub-Total			Only top 3 scoring proposals will advance to 7.			
7.	Reference Checks	5	If applicable			
Grand Total:						

- **Notes:** Cost score will show maximum (150) for lowest cost and pro-rated proportionally to highest cost (to a value of up to 1.5 times of low cost). No points will be awarded for costs exceeding 1.5 times of low cost.

Attachment F - Litigation & Conflict of Interest Statement

The Corporation may, in its sole discretion, reject a submission if the Proponent:

- i. Has, at any time, threatened, commenced or engaged in legal claims or litigation against the Corporation of the City of Port Colborne.
- ii. Is involved in a claim or litigation initiated by the Corporation.
- iii. Previously provided goods or services to the Corporation in an unsatisfactory manner.
- iv. Has failed to satisfy an outstanding debt to the Corporation.
- v. Has a history of illegitimate, frivolous, unreasonable, or invalid claims.
- vi. Provides incomplete, unrepresentative or unsatisfactory references.
- vii. Has engaged in conduct that leads the Corporation to determine that it would not be in the Corporations' best interests to accept the submittal.
- viii. Has a conflict of interest or that which may be viewed as a conflict of interest either with or by the Corporation.

The Proponent, all of the Sub-consultants, and any of their respective advisors, partners, directors, officers, employees, agents, and volunteers shall not engage in any activity or provide any services where such activity or the provision of such services creates a conflict of interest (actually or potentially, in the sole opinion of the Corporation) with the provision of the Work pursuant to the Proposal. The Proponent acknowledges and agrees that a conflict of interest includes the use of Confidential Information where the Corporation has not specifically authorized such use.

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

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

A breach of this Article by the Proponent, any of the Sub-consultants, or any of their respective advisors, partners, directors, officers, employees, agents, and volunteers shall entitle the Corporation to terminate the Proposal, in addition to any other rights and remedies that the Corporation has in the Proposal, in law, or in equity.

(see below)

Project No.: 2021-43

Type: Request for Proposal

Title: Affordable Housing Strategy and Action Plan

Attachment G - Envelope Submission Information

Envelope #1

**Amber LaPointe
City Clerk
City of Port Colborne
66 Charlotte Street
Port Colborne, ON L3K 3C8**

a) PROPOSAL
b) ADDENDUM (if applicable)

**Project No.: 2021-43
RFP – Affordable Housing Strategy & Action Plan**

Closing: January 19, 2022 at 2:00 p.m. local time

Consultant: _____

Envelope #2

**Amber LaPointe
City Clerk
City of Port Colborne
66 Charlotte Street
Port Colborne, ON L3K 3C8**

a) CONSULTING FEES

**Project No.: 2021-43
RFP – Affordable Housing Strategy & Action Plan**

Closing: January 19, 2022 at 2:00 p.m. local time

Consultant: _____

Project No.: 2021-43

Type: Request for Proposal

Title: Affordable Housing Strategy and Action Plan

Attachment H - Project History

The Consultant is required to provide their Project History for the past three years and the current status of these projects as they pertain to each of the Consultant's project team members.

The following information should be listed for each project member and/or each project accordingly:

Project Name

Project Team Member(s)

Project Completion Date

(if project not complete, provide the anticipated completion date)