

# The Corporation of the Municipality of Brockton



## By-Law 2020-090

---

Being a By-Law to Enter into an Agreement with Stantec Consulting Ltd. to complete a Land Use Development Process Management Review for the Municipality of Brockton.

---

**Whereas** the *Municipal Act, 2001, S.O. 2001, c. 25*, Section 5(1), as amended, provides that the powers of a municipal corporation are to be exercised by its council;

**And Whereas** the *Municipal Act, 2001, S.O. 2001, c. 25*, Section 5(3), as amended, provides that a municipal power, including a municipality's capacity rights, powers and privileges under section 9; shall be exercised by By-Law;

**And Whereas** the Council for the Corporation of the Municipality of Brockton Council deems it expedient to enter into an Agreement with Stantec Consulting Ltd. to complete a Land Use Development Process Management Review for the Municipality of Brockton;

**Now Therefore** the Council of the Corporation of the Municipality of Brockton enacts as follows;

- 1.0 That the Council of the Corporation of the Municipality of Brockton approves entering into an Agreement with Stantec Consulting Ltd. for an upset limit amount of \$44,284 exclusive of H.S.T. to complete a Land Use Development Process Management Review as described in the attached Schedule "A" to this By-Law.
- 2.0 That the Mayor and Clerk are hereby authorized to sign on behalf of the Council for The Corporation of the Municipality of Brockton, any contracts and other documents required to authorize such purchase to proceed, and to affix the corporate seal of the Municipality of Brockton.
- 3.0 This By-Law shall come into full force and effect upon final passage.
- 4.0 This By-Law may be cited as the "Land Use Development Process Management Review Agreement Acceptance By-Law".

**Read, Enacted, Signed and Sealed this 25th day of August, 2020.**

---

Mayor – Chris Peabody

---

Clerk – Fiona Hamilton



Stantec Consulting Ltd.  
600-171 Queens Avenue, London ON N6A 5J7

August 17, 2020  
File: 161414014

Attention: Fiona Hamilton  
VIA EMAIL: fhamilton@brockton.ca

Dear Fiona,

**Reference: Brockton Land Use Development Process Management Review**

We are pleased that Brockton Staff and Council have accepted our proposal for the above noted services. The proposal and clarifications are attached, and form the scope of services for this assignment, with a total upset limit of \$44,284, inclusive of disbursements but exclusive of HST. Please find attached our Standard Terms and Conditions, which when executed, will serve as the contract for services.

Regards,

**Stantec Consulting Ltd.**

A handwritten signature in blue ink, appearing to read 'Stephanie L. Bergman', written over a light blue circular stamp.

**Stephanie L. Bergman** MA  
Planner  
Phone: 519-675-6614  
stephanie.bergman@stantec.com

Attachment: Standard Terms and Conditions, Stantec RFP Submission, and Clarifications

Reference: Brockton Land Use Development Process Management Review

By signing this proposal, Municipality of Brockton authorizes Stantec to proceed with the services herein described and the Client acknowledges that it has read and agrees to be bound by the attached Professional Services Terms and Conditions.

This proposal is accepted and agreed on the 8 day of August, 2020.

Per: Municipality of Brockton

Fiona Hamilton, Clerk

Print Name & Title

\_\_\_\_\_

Signature



The following Terms and Conditions are attached to and form part of a proposal for services to be performed by Consultant and together, when the Client authorizes Consultant to proceed with the services, constitute the Agreement. Consultant means the Stantec entity issuing the Proposal.

**DESCRIPTION OF WORK:** Consultant shall render the services described in the Proposal (hereinafter called the "Services") to the Client.

**DESCRIPTION OF CLIENT:** The Client confirms and agrees that the Client has authority to enter into this Agreement on its own behalf and on behalf of all parties related to the Client who may have an interest in the Project.

**TERMS AND CONDITIONS:** No terms, conditions, understandings, or agreements purporting to modify or vary these Terms and Conditions shall be binding unless hereafter made in writing and signed by the Client and Consultant. In the event of any conflict between the Proposal and these Terms and Conditions, these Terms and Conditions shall take precedence. This Agreement supercedes all previous agreements, arrangements or understandings between the parties whether written or oral in connection with or incidental to the Project.

**COMPENSATION:** Payment is due to Consultant upon receipt of invoice. Failure to make any payment when due is a material breach of this Agreement and will entitle Consultant, at its option, to suspend or terminate this Agreement and the provision of the Services. Interest will accrue on accounts overdue by 30 days at the lesser of 1.5 percent per month (18 percent per annum) or the maximum legal rate of interest. Unless otherwise noted, the fees in this agreement do not include any value added, sales, or other taxes that may be applied by Government on fees for services. Such taxes will be added to all invoices as required.

**NOTICES:** Each party shall designate a representative who is authorized to act on behalf of that party. All notices, consents, and approvals required to be given hereunder shall be in writing and shall be given to the representatives of each party.

**TERMINATION:** Either party may terminate the Agreement without cause upon thirty (30) days notice in writing. If either party breaches the Agreement and fails to remedy such breach within seven (7) days of notice to do so by the non-defaulting party, the non-defaulting party may immediately terminate the Agreement. Non-payment by the Client of Consultant's invoices within 30 days of Consultant rendering same is agreed to constitute a material breach and, upon written notice as prescribed above, the duties, obligations and responsibilities of Consultant are terminated. On termination by either party, the Client shall forthwith pay Consultant all fees and charges for the Services provided to the effective date of termination.

**ENVIRONMENTAL:** Except as specifically described in this Agreement, Consultant's field investigation, laboratory testing and engineering recommendations will not address or evaluate pollution of soil or pollution of groundwater.

**PROFESSIONAL RESPONSIBILITY:** In performing the Services, Consultant will provide and exercise the standard of care, skill and diligence required by customarily accepted professional practices normally provided in the performance of the Services at the time and the location in which the Services were performed.

**INDEMNITY:** The Client releases Consultant from any liability and agrees to defend, indemnify and hold Consultant harmless from any and all claims, damages, losses, and/or expenses, direct and indirect, or consequential damages, including but not limited to attorney's fees and charges and court and arbitration costs, arising out of, or claimed to arise out of, the performance of the Services, excepting liability arising from the sole negligence of Consultant.

**LIMITATION OF LIABILITY:** It is agreed that the total amount of all claims the Client may have against Consultant under this Agreement, including but not limited to claims for negligence, negligent misrepresentation and/or breach of contract, shall be strictly limited to the lesser of professional fees paid to Consultant for the Services or \$50,000.00. No claim may be brought against Consultant more than two (2) years after the cause of action arose. As the Client's sole and exclusive remedy under this Agreement any claim, demand or suit shall be directed and/or asserted only against Consultant and not against any of Consultant's employees, officers or directors.

Consultant's liability with respect to any claims arising out of this Agreement shall be absolutely limited to direct damages arising out of the Services and Consultant shall bear no liability whatsoever for any consequential loss, injury or damage incurred by the Client, including but not limited to claims for loss of use, loss of profits and/or loss of markets.

Liability of Consultant shall be further limited to such sum as it would be just and equitable for Consultant to pay having regard to the extent of its responsibility for the loss or damage suffered and on the assumptions that all other consultants and all contractors and sub-contractors shall have provided contractual undertakings on terms no less onerous than those set out in this Agreement to the Client in respect of the carrying out of their obligations and have paid to the Client such proportion of the loss and damage which it would be just and equitable for them to pay having regard to the extent of their responsibility.

**DOCUMENTS:** All of the documents prepared by or on behalf of Consultant in connection with the Project are instruments of service for the execution of the Project. Consultant retains the property and copyright in these documents, whether the Project is executed or not. These documents may not be used for any other purpose without the prior written consent of Consultant. In the event Consultant's documents are subsequently reused or modified in any material respect without the prior consent of Consultant, the Client agrees to defend, hold harmless and indemnify Consultant from any claims advanced on account of said reuse or modification.

Any document produced by Consultant in relation to the Services is intended for the sole use of Client. The documents may not be relied upon by any other party without the express written consent of Consultant, which may be withheld at Consultant's discretion. Any such consent will provide no greater rights to the third party than those held by the Client under the contract, and will only be authorized pursuant to the conditions of Consultant's standard form reliance letter.

Consultant cannot guarantee the authenticity, integrity or completeness of data files supplied in electronic format ("Electronic Files"). Client shall release, indemnify and hold Consultant, its officers, employees, Consultant's and agents harmless from any claims or



damages arising from the use of Electronic Files. Electronic files will not contain stamps or seals, remain the property of Consultant, are not to be used for any purpose other than that for which they were transmitted, and are not to be retransmitted to a third party without Consultant's written consent.

**FIELD SERVICES:** Consultant shall not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with work on the Project, and shall not be responsible for any contractor's failure to carry out the work in accordance with the contract documents. Consultant shall not be responsible for the acts or omissions of any contractor, subcontractor, any of their agents or employees, or any other persons performing any of the work in connection with the Project. Consultant shall not be the prime contractor or similar under any occupational health and safety legislation.

**GOVERNING LAW/COMPLIANCE WITH LAWS:** The Agreement shall be governed, construed and enforced in accordance with the laws of the jurisdiction in which the majority of the Services are performed. Consultant shall observe and comply with all applicable laws, continue to provide equal employment opportunity to all qualified persons, and to recruit, hire, train, promote and compensate persons in all jobs without regard to race, color, religion, sex, age, disability or national origin or any other basis prohibited by applicable laws.

**DISPUTE RESOLUTION:** If requested in writing by either the Client or Consultant, the Client and Consultant shall attempt to resolve any dispute between them arising out of or in connection with this Agreement by entering into structured non-binding negotiations with the assistance of a mediator on a without prejudice basis. The mediator shall be appointed by agreement of the parties. The Parties agree that any actions under this Agreement will be brought in the appropriate court in the jurisdiction of the Governing Law, or elsewhere by mutual agreement. Nothing herein however prevents Consultant from any exercising statutory lien rights or remedies in accordance with legislation where the project site is located.

**ASSIGNMENT:** The Client shall not, without the prior written consent of Consultant, assign the benefit or in any way transfer the obligations under these Terms and Conditions or any part hereof.

**SEVERABILITY:** If any term, condition or covenant of the Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions of the Agreement shall be binding on the Client and Consultant.

**FORCE MAJEURE:** Any default in the performance of this Agreement caused by any of the following events and without fault or negligence on the part of the defaulting party shall not constitute a breach of contract, labor strikes, riots, war, acts of governmental authorities, unusually severe weather conditions or other natural catastrophe, disease, epidemic or pandemic, or any other cause beyond the reasonable control or contemplation of either party. Nothing herein relieves the Client of its obligation to pay Consultant for services rendered.

**COVID-19:** The parties acknowledge the ongoing COVID-19 pandemic and agree that the fee and schedule in the proposal does not include any schedule or cost impact that may occur as a result thereof. To the extent that there are cost or schedule impacts resulting from the COVID-19 pandemic, Stantec shall be entitled to an equitable change order.

**CONTRA PROFERENTEM:** The parties agree that in the event this Agreement is subject to interpretation or construction by a third party, such third party shall not construe this Agreement or any part of it against either party as the drafter of this Agreement.



Stantec Consulting Inc. Legal Entity  
600-171 Queens Avenue  
London ON N6A 5J7

July 14, 2020  
File: 161489985

Attention: Cally Mann, Municipal Executive Coordinator  
Via email - cmann@brockton.ca

Dear Ms. Mann,

Reference: **File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review**

It is with enthusiasm that we submit this response for professional consulting services associated with the Municipality of Brockton's Land Use Development Process Management Review. We understand just how important this project will be in supporting the current and long-term growth management of your Municipality and in establishing opportunities for efficiencies and streamlining of the land use services offered by the Municipality. The Stantec team has recently completed a review of the Bruce County Land Use Planning Service Delivery, and feels that Brockton's management review is a logical extension of that work with an increased focus on the local municipal process and a goal to enhance the local developer experience.

## Project Understanding

The Municipality of Brockton with its rich farmland is the largest agricultural producer in Bruce County. It is experiencing residential growth in some of the more urban settlements, such as the former Town of Walkerton, but also within the rural areas of the Municipality and the original hamlets of Cargill, Chepstow, Elmwood, Glamis, Lake Communities, Pinkerton and Riversdale. As the Municipality grows, Brockton strives to respect their agricultural roots and support the infrastructure and networks that are necessary to maintain the area's strong farming industry and agri-business community.

The vibrant local economy mixes modern agriculture, urban energy, rural charm and state-of-the-art innovation. Managing and fostering appropriate growth, by ensuring that developers and new residents are welcomed here, all starts with the land use development system. Ensuring that developers receive the highest quality of customer service, efficient and streamlined processes, and timely results is paramount in ensuring development occurs with a clear set of expectations, in a structured and consistent manner, while adding value to the long-term growth of the community.

Therefore, this review will seek to address questions like:

- Is there opportunity for more efficient and effective allocation of various responsibilities?
- Are there duplication of activities that can be eliminated?
- Are there opportunities for cost saving?
- Are there barriers to making effective and responsive infrastructure and service delivery decisions?
- Where is the red tape, and how can it be reduced?

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

If chosen, the Stantec team will work closely with staff to offer solutions so that the development approval process moves more quickly to save time and cost, while achieving good planning outcomes. This review may lead to results that involve:

- Providing clarity on standards and requirements during the approval process for developers
- Reducing the number of incomplete applications submitted
- Arriving at approval decision within prescribed timelines
- Increasing coordination between the local municipal and other approval granting authorities, such as the County
- Reducing the number of appeals to the Local Planning Appeals Tribunal (LPAT)
- Encouraging residents and businesses to follow the overall vision and development goals set out by the Municipality in its Official Plan and other planning documents.

## Company Background & Project Team

Our team has the right mix of municipal government and planning experience, having worked in county/regional and two-tier governmental frameworks, with extensive experience providing consulting services to local municipalities. We have the desire to assist you in finding ways to improve the land use development process to ensure consistency and fairness in a way that best addresses future growth and development and that realizes your Municipality's land use goals and objectives. You will note that our core team has a powerful mix of municipal advisory services, stakeholder engagement experience, and have worked in a multitude of regulatory environments servicing private developer clients.

The Stantec team that we have assembled to carry out this project includes:

**Greg Romanick, MCIP, RPP, MBA** has over 40 years of experience as a municipal government Administrator and City Planner with the City of Waterloo and as a consulting Planner with Stantec Consulting Ltd. He has worked in every conceivable role within the planning and development industry. In addition to his practical 'in-the-trenches' municipal governance experience, Greg applied his planning and business administration background by being involved in the development and facilitation of numerous corporate strategic plans, visioning processes, organizational and department redesign and restructuring efforts, service delivery reviews and continuous improvement/quality management efforts. **Greg will provide senior leadership to the project team and guide content creation for this project, while providing insights based on his experiences leading the recent Bruce County Land Use Planning Service Delivery Review.**

**Jonathan Tinney, RPP, MCIP**, is currently the Geographic Discipline Lead for Stantec's planning practice in Ontario and has recently joined us following time as the Chief Planner for the City of Victoria. Jonathan brings a track record of successful projects supporting more vibrant, resilient, and successful communities across Canada and internationally. Recently, while working with another firm, he completed a Strategic Plan for the City of Toronto's Planning Department, which dealt with reviewing the City's land use planning delivery model. Also, he made many organizational and process improvements in the City of Victoria's planning department during his time as Chief Planner. **For this project, Jonathan will provide strategic**

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

**guidance and support, technical expertise, drawing on insights from his recent experience with the Bruce County Land Use Planning Service Delivery Review.**

**Stephanie Bergman** is a Project Manager and Planner with over seven years of experience, and extensive familiarity with the land use planning system within various upper and lower tier municipal contexts. Stephanie has experience managing a range of planning projects, including the use of meaningful stakeholder consultation and engagement to inform project recommendations. Stephanie regularly liaises with government agencies, property management and land development corporations, conservation authorities, Indigenous communities, and community stakeholders. She successfully navigates a range of planning and development processes including Official Plan and Zoning Bylaw Amendments, Site Plans, and Consents, and has a strong applied knowledge of Planning Act regulations. Through her work on transportation, water servicing, sanitary servicing, stormwater management and land use planning and development projects, she has gained valuable experience in managing a range of technical and environmental specialists. **For this project, Stephanie will serve as the Project Manager by coordinating resources, monitoring progress and budget, as well as providing insight into alternative models for development processing.**

**Amelia Sloan, RPP, MCIP**, has recently joined Stantec following time at both the Ministry of Municipal Affairs and Housing and the County of Oxford, where she served as a Planner with the distinct tasks of policy development and providing planning support to special corporate projects. With over seven years of public sector planning experience, she has been involved in many complex, long-range policy projects, including legislative reviews, comprehensive official plan updates, and corporate strategic plans. She has significant experience with the Provincial Policy Statement (PPS) in its current and revised forms. **For this project, Amelia will serve as a Project Planner and apply her knowledge of land use policy and legislation, combined with experience in rural planning in Ontario, to support the completion of the project, collect data and information, formulate recommendations, and support stakeholder engagement.**

**Moira Davidson** is an Urban Planner at Stantec with over two years of consulting experience. With a solid foundation in land use and policy planning, she brings a wide range of experience from both a public policy and private land development perspective. She has a broad understanding of the planning and development process in Ontario, which has assisted her in drafting various Planning Memos, By-laws, Planning Justification Reports and Urban Design Briefs for a variety of residential, commercial, and industrial clients throughout Ontario and British Columbia. She also has experience undertaking policy framework research and analyzing municipal and provincial legislation, which has assisted her in preparing deliverables and organizing public consultation events for various Comprehensive Zoning By-law projects and Community Improvement Plan projects. Moira is a candidate member of the Canadian Institute of Planners (CIP) and is working towards obtaining her Registered Professional Planner (RPP) certification. **Moira was integral to the completion of the recent Bruce County Land Use Planning Service Delivery Review and will serve as a key Project Planner on this project.**

Our extensive experience makes us a powerful and effective team, well-positioned to deliver a successful review of Brockton's development services. Each of our CVs are provided in **Appendix 1**.



Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

## Methodology

After the project initiation meeting, Stantec proposes that the data collected in the completion of this review will occur through three separate tasks during a Data Collection Phase, that will occur from August 17<sup>th</sup> to September 7<sup>th</sup>. During this initial phase, data and information will be collected and compiled based on the following tasks:

- **External Review:** Using tools and resources that are currently available to the public, assess the ease of the development process from a local landowner/developer's perspective. The tools and resources that would be reviewed and assessed in this task, include:
  - Brockton's web presence, ease of navigation, availability of online information (e.g. zoning info., application fees, application submission process/contacts, online intake forms, etc.) for each type of development application from a developer's perspective.
  - The availability of online mapping information as a tool to assess and select appropriate development sites. As requested, this review will evaluate the ease of information available on municipal land available for sale, specifically the East Ridge Business Park.
  - Information and guidance material available to developers for providing complete applications under the Planning Act.
  - Information and guidance material available to builders/homeowners seeking building permits.
  - The number and length of public meetings to support the Planning Act requirements.
  - Available resources for guiding development in Brockton (e.g. East Ridge Development Guidelines).
  - Interviews with local developers and/or industry groups (e.g. Grey-Bruce homebuilders)
- **Internal Review:** Complete review/audit of internal documents, templates, processes, etc. that are used by the Municipality to aid in their development review and building approval processes to assess any efficiencies in the internal processing of development applications and communications. The following could be used as sources of information for this task:
  - Template agreements for subdivisions and site plans, community improvement plans, etc.
  - Sample email exchanges on two development applications (one minor vs. one major, or one complex application vs. one straightforward application) between local staff and with the County
  - Interviewing municipal staff with the intent to further understand their role in facilitating and guiding development within the Municipality. For example, the Clerk, Development

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

Engineer, Municipal Engineer, Director of Operations, Roads Supervisor, and Chief Building Official

- Past operational and organizational reviews, and input from senior staff on their implementation to date.
  - Any internal guidance or staff training material that is used to guide the development review process.
  - Report samples and/or templates for each type pf application.
  - Past Council and/or standing committee, or public open house, meeting minutes on recent controversial, or longer than typical, development applications.
- **Review of Comparable Municipalities:** Data and comparable information will also be collected from comparable municipalities, with the aim of informing potential changes to the fee recovery structure and to gain an understanding of other municipality's development processes. To do this, the following will be undertaken to inform this task:
    - Review the planning and development fees of ten (10) similarly sized and geographically comparable municipalities. This review will include a summary of application fees, development charges, building permit fees, and any other fees associated with development (e.g. subdivision clearance fees, etc.).
    - Refine list of municipalities who the Project Team believes to be 'development friendly' municipalities to at least three (3) and document the best practices that have led them to be considered as such. This would include an evaluation of the systems and of software used by other lower-tiers that would benefit Brockton and that would support data transfer between lower-tier and County system.

After the Data Collection Phase, the team will work from September 7<sup>th</sup> to 17<sup>th</sup> to develop strategies and solutions, in a Prioritizing Solutions Phase. A virtual workshop will be held during this time with Stantec and the municipal Project Team whereby Stantec will present potential recommendations, solutions (including Digital Transformation Strategies) and the Municipality will have the opportunity to provide their comments and feedback on each, as well as providing input on the length of time and priority of the noteworthy recommendations. The aim of this workshop will be to lay out the draft 'state of the development management process' with staff and discuss the key needs and priorities based on the Team's experiences and staff's input.

In preparing this proposal letter we have investigated several digital and process improvement programs within other municipalities to assess strategies that may be useful for this project. Our team's firsthand experience with process updates in Oxford County, the City of Toronto, City of Victoria, and the Region of Waterloo will be drawn on to develop solutions. As well, we have undertaken research on approaches

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

implemented by the City of Calgary's updates to approval and building processes and associated technology, processes implemented by the City of Medicine Hat, lessons learned from the City of Hamilton's digital transformation program, and several others. This research has offered a set of opportunities (albeit at a larger scale) that we feel could be explored for their applicability to Brockton through this project. These include:

- The use of ePermit database software to reduce waiting times for developers and removed unnecessary administrative processing;
- Centralizing and/or rationalizing financial and customer services functions to better achieve outcomes with more efficiency in processing payments and/or document consolidation (e.g. zoning by-laws);
- Reviewing how the Planning Act timelines are being calculated and determine where any avoidable delays may be occurring, if legislative timelines are not being met;
- Determining if any duplication of public processes (e.g. public meetings for applications that require local and County approval);
- Providing an approach and process elements for effective and supportive pre-submission consultation for land developer, and all proponents of a development application to get then onto an early 'fast-track' for submission of a complete and ready-to-be-processed application;
- Assessing the redistribution of approval authority for applications such as consents (severances) or subdivisions to the local level, with coordination with the County, to inform any future reviews of the MOU between Bruce County and Brockton;
- Reviewing the timelines of 3<sup>rd</sup> party review agencies (conservation authorities, provincial ministries, etc.) and assessing ways for improved collaboration;
- Providing accessible information on the location of lands ready for development, through collaborate approaches with economic development, by informing developers about prime development or re-development areas to direct applicants to places where the Municipality is prepared to accommodate growth in locations where infrastructure and amenities are in place (e.g. vacant land inventories, publicly available mapping, etc.);
- Online and hard copy development process brochures and/or development application manuals for more detailed "how-to" make a complete application.

Next, the Draft Plan will be completed in the two weeks following prioritizing solutions and receiving feedback from municipal staff. As such, the Stantec team will be completing ongoing analysis of the information gained in the earlier phases and preparing a draft for submission to the Project Team on October 1, 2020. It will include an evaluation of the current process, outlining any gaps or improvements that are necessary for improved customer service when seeking development information. The report would seek to outline:

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

- Suggested organizational and reporting structure changes regarding the process for managing the review and approvals of development projects (e.g. points of contact with developer/applicant, points of contact with County, public meetings, etc.)
- Suggested changes to the service delivery roles and responsibilities, and the associated distribution of such roles between the County and local Municipality, which can help guide any future updates to the memorandum of understanding between Brockton and Bruce County.
- Recommendations for monitoring and tracking applications (e.g. internal checklists, etc.)
- Improvements to their web presence and any guidance documents (e.g. application manuals) and education on the planning process (e.g. length of application processing, PPS applicability, etc.) as a means to gain interest and attraction from residents interested in housing or re-locating.
- Recommendations for improving the online presence of lands for sale in Brockton generally, and more specifically in the East Ridge Business Park.
- Improvements and ways to better harness existing financial tools to support and attract attainable housing projects (CIPs, community benefits, etc.)
- Any other recommendations that Stantec deems appropriate for inclusion, due to information/research discovered over the course of the Project's completion

The draft report will be accompanied by an Implementation Summary document that will serve to summarize the recommendations/solutions, identify them as short- or long-term solutions, and provide associated costing estimates. Additionally, this Implementation Summary could provide indicators of the following (if deemed necessary at the Project Initiation Meeting): Potential relative benefits realized by the solution (productivity, time savings, etc.), timeframes for implementing the solution (e.g. term of Council, within the year, etc.), or any potential risk associated with implementing the solution. This document would aim to provide guidance on where Brockton can have the greatest realization of the recommended efficiencies that can be gained through the modernization efforts, and how to implement solutions rapidly using other resources.

The Draft Report would be presented to the Municipality, as outlined in the RFP, by a Stantec Team member on October 13<sup>th</sup>, with any final changes to the draft report compiled and shared by October 16<sup>th</sup> to ensure that the final report would be delivered October 21<sup>st</sup>. Following that, an additional presentation would be presented to Council on October 27<sup>th</sup>.

### Municipal Resources:

Throughout the course of this project, the municipality will be requested to provide assistance with data collection and coordination with stakeholders, as well as providing timely comments and feedback on their review of the draft document in accordance with the schedule provided.

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

## Workplan/Schedule

The work plan, shown as **Appendix #2**, provides an outline of the tasks identified above with the corresponding timelines for completion.

## Clarifications

The following clarifications and assumptions apply to this proposal:

- This review will focus on the process for managing and processing municipal planning applications. As outlined in the RFP, those being processed by the Municipality of Brockton include zoning administration, building permit applications, subdivision agreement processes, and site plan control, as well as inquiries for variances and severances. Other types of planning-related permits which may be managed by the municipality are outside the scope of this review (e.g. heritage permits, septic tank permits, change of use permits or record of site condition permits, etc.).
- Applicable background studies, Division budgets and statistics related to service delivery activities, organizational structures, relevant research or analysis, strategic or policy document (e.g. existing CIPs), relevant legislation outlined in this Proposal will be provided to Stantec immediately upon seeking our professional services to maintain schedule timelines.
- This budget has been submitted with the assumption that all project team meetings, and presentations to Councils or Standing Committees will be completed virtually. If future easing of restrictions on gatherings allow for in-person presentations or meetings during the completion of this project, travel budgets can be provided at the Client's request.
- As we are all aware, we are working in unprecedented times as a result of the COVID-19 pandemic. The situation is fluid. Our proposal is based on our understanding of performing these services in normal conditions. As the nature and extent of the impacts due to this outbreak cannot be fully identified or quantified at this time, we feel it would be prudent to submit this proposal based on normal conditions, without accounting for impacts due this outbreak, and to discuss with you once we are able to evaluate the impacts and to work collaboratively with you on a path forward. We would be pleased to have a further discussion with you to share our respective plans and efforts to help mitigate the impact of this evolving situation on your proposed project. As we have suggested that all meetings are virtual, we do not foresee challenges with the schedule and fee proposed.

## Costs

Costs have been submitted under a separate cover, under **File B**, which contains the completed Pricing Proposal Form and the Proponent's Ability and Experience Form.

Reference: File A: Proposal for RFP No. CAO 2020-01 - Land Use Development Process Management Review

## Conclusions

The services we propose to provide at this time are set forth in the scope of services as detailed above. Should you feel that the scope of services could be modified in any way, we would be pleased to discuss such modifications with you in detail.

We appreciate the opportunity to submit this proposal and we have tried to be thorough in our assessment of services required to complete this assignment. If you have any questions or would like to clarify anything within this proposal, please do not hesitate to contact the undersigned.

Regards,



---

**Amelia Sloan** MCIP, RPP  
Planner, Community Development  
Phone: 226-926-8794  
Amelia.Sloan@Stantec.com



---

**Jonathan Tinney** MCIP, RPP  
Lead, Community Development  
Phone: 437-242-8396  
Jonathan.Tinney@Stantec.com

Attachment: Appendix #1 - Project Team CVs  
Appendix #2 - Schedule

c. C.C.

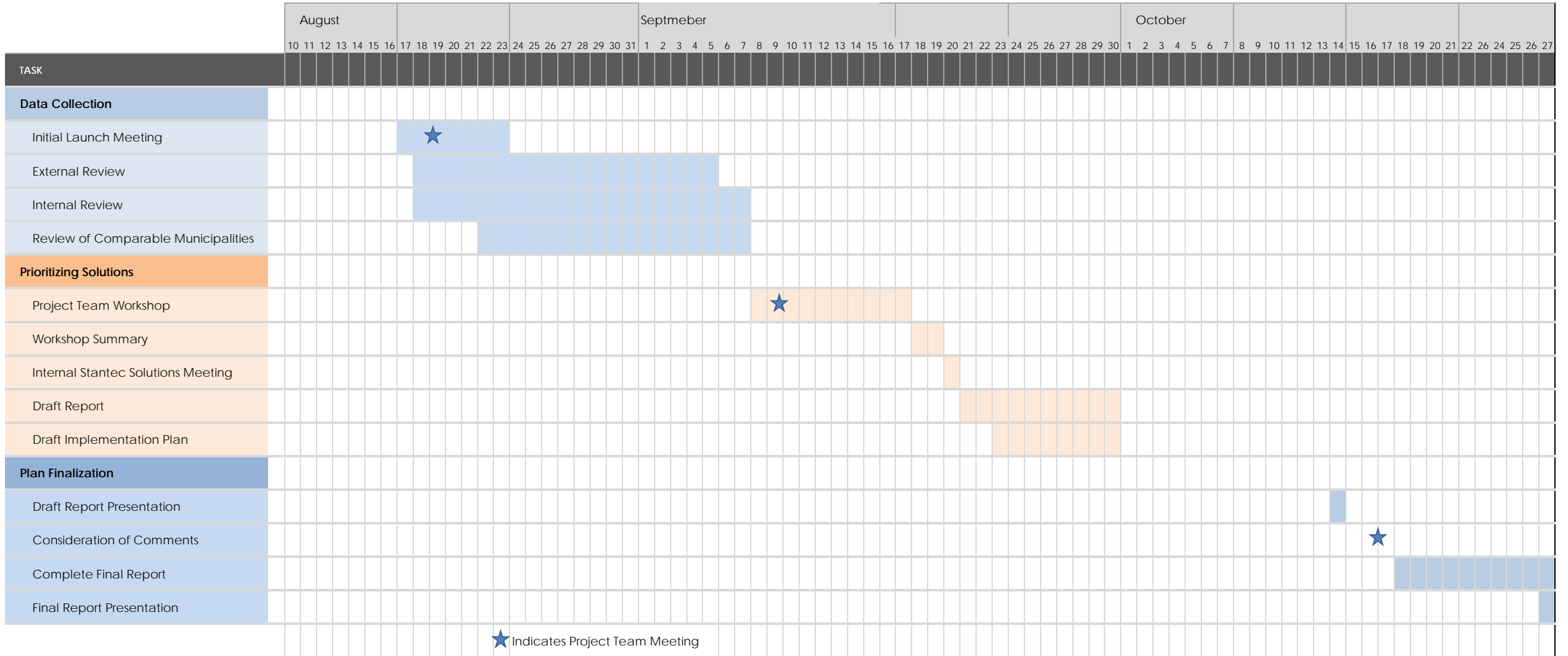
sa V:\01614\promotion\161489000 - Official Proposal Folder\161489985\_Brockton\_Service\_Review

# **APPENDIX 2**

## **Project Schedule**

# Brockton Land Use Development Process Management Review

### Proposed Project Schedule





## Proposal Form

The following Proposal Form shall be completed and included with the proposal.

For the Provision of: Municipal Modernization Funding –  
Land Use Development Process Management Review

**Submitted by:** Stantec Consulting Ltd.  
Firm Name  
600-171 Queens Avenue  
London ON N6A 5J7  
Address Postal Code

### Hereinafter Called the Proponent

**To:** Municipality of Brockton  
PO Box 68, 100 Scott Street  
Walkerton, ON, N0G 2V0

### Hereinafter Called the Municipality

The Proponent declares that:

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

### Acknowledgement to receipt of Addenda

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

**Addendum #    Date Received**

# \_\_\_\_\_

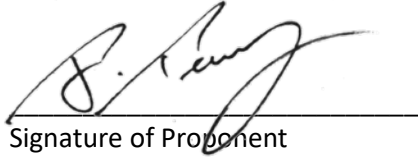
# \_\_\_\_\_

**Check here if no Addenda received**



Lowest or Any Bid Not Necessarily Accepted

Date July 15, 2020

  
Signature of Proponent

  
Signature of Witness

By my signature, I hereby confirm I am a principal, or have been duly authorized by the  
Principal/ Board of Stantec Consulting Ltd., to sign on behalf  
(Name of Firm)  
of the above named.

#### 4.1 Pricing Proposal Form

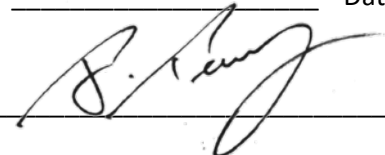
### Pricing Proposal Form

The following form shall be completed and included with the proposal.

The price bid shall include for all professional fees, meetings, sub-consultant's charges, if any, and for all disbursements for mileage, meals, printing, equipment rental rates, associated office disbursements and any other activity relating to the completion of the Project. **The lump sum fee submitted shall not be exceeded without the prior written authorization of the Municipality.**

Description	Fee (Excluding HST)
Task 1 – Municipal Modernization Funding - Land Use Development Process Management Review Lump Sum Fee	\$ 25,572
	\$
<b>Total</b>	\$

Proponent: Jonathan Tinney Date July 15, 2020

Signature:  \_\_\_\_\_



# Time Task and Fee Matrix

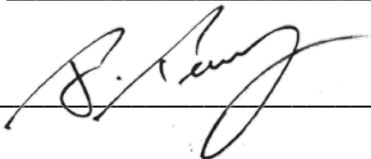
	Greg Rominack	Jonathan Tinney	Stephanie Bergman	Amelia Sloan	Maira Davidson	Hours Summary		Expenses / Allowances	Sub-Consultants	Total
	\$191	\$210	\$157	\$146	\$135	Hours	\$			
<b>Part 1</b>										
Initial Launch Meeting		2	2	2		6.0	\$1,026.00			\$1,026.00
External Review (incl. interviews)				4	8	12.0	\$1,664.00			\$1,664.00
Internal Review (incl. interviews)				12		12.0	\$1,752.00			\$1,752.00
Review of Comparable Municipalities	2	2		6	6	16.0	\$2,488.00			\$2,488.00
Internal meetings and communications			6	3		9.0	\$1,380.00			\$1,380.00
Sub-Total (Part 1)	2.0	4.0	8.0	27.0	14.0	55.0	\$8,310.00	\$0.00	0.00	\$8,310.00
	\$ 382	\$ 840	\$ 1,256	\$ 3,942	\$ 1,890					
<b>Part 2</b>										
Virtual Project Team workshop			3	3	3	9.0	\$1,314.00			\$1,314.00
Workshop Summary					2	2.0	\$270.00			\$270.00
Stantec meeting re. solutions	2	2	2	4	2	12.0	\$1,970.00			\$1,970.00
Draft report			5	20	20	45.0	\$6,405.00	\$200.00		\$6,605.00
Draft Implementation Plan		2	2	6		10.0	\$1,610.00			\$1,610.00
Additional Client Meeting			1	3	3	7.0	\$1,000.00			\$1,000.00
Sub-Total (Part 2)	2.0	4.0	13.0	36.0	30.0	85.0	\$12,569.00	\$200.00	\$0.00	\$12,769.00
	\$ 382	\$ 840	\$ 2,041	\$ 5,256	\$ 4,050					
<b>Part 3</b>										
Draft Report Presentation		1		4	3	8.0	\$1,199.00			\$1,199.00
Consideration of Municipal comments				4	4	8.0	\$1,124.00			\$1,124.00
Final Report completed	2	2	2			6.0	\$1,116.00	200.0		\$1,316.00
Final Report presentation				4	2	6.0	\$854.00			\$854.00
Sub-Total (Part 3)	2.0	3.0	2.0	12.0	9.0	28.0	\$4,293.00	\$200.00	\$0.00	\$4,493.00
	\$ 382	\$ 630	\$ 314	\$ 1,752	\$ 1,215					
<b>PROJECT TOTAL SUMMARY (Part 1-3)</b>										
PROJECT TOTAL	6.0	11.0	23.0	75.0	53.0	168.0	\$25,172.00	\$400.00		\$25,572.00
	\$ 1,146	\$ 2,310	\$ 3,611	\$ 10,950	\$ 7,155					

#### 4.2 Proponent Information Form

The following Proponent Information Form shall be completed and included with the proposal.

1	Proponent's Contact Individual: Jonathan Tinney
2	Mailing Address: 600-171 Queens Avenue London ON N6A 5J7
3	Office Phone Number: n/a
4	Toll Free Phone Number: n/a
5	Mobile Phone Number: (437) 242-8396 or (226) 926-8794
6	E-mail Address: jonathan.tinney@stantec.com or amelia.sloan@stantec.com
7	Website: <a href="https://www.stantec.com/en">https://www.stantec.com/en</a>
8	WSIB Account #: Clearance certiiicate #: A0000GUDJX
9	HST Account #: 88725 1288-0001 RT

Proponent: Jonathan Tinney

Signature:  Date July 15, 2020

#### 4.3 Proponent's Ability and Experience Form

The following Proponent's Ability and Experience Form shall be completed and included with the proposal.

### Proponent's Ability and Experience Form

Proponents shall provide information below on previous, similar projects that have been successfully undertaken by the Proponent's firm in the past three (3) years.

Contract/Project #1	Insert Information
Name of reference municipality	Bruce County
Name of Contact and Telephone number	Matt Meade, Corporate Strategic Initiatives Specialist, mmeade@brucecounty.on.ca (519-881-1291)
Total Value (annual)	\$30,000
Description of Work	Stantec's project team recently completed a review of Bruce County's land use planning division's structure, service delivery model and roles and responsibilities. Stantec obtained information from stakeholders (local municipal staff, partner agencies) and comparable upper-tier municipalities, as well as an in-depth review of internal processes, to develop recommendations for enhancements relative to the division's role and service delivery model. Recommendations included those related to development review functions, policy and long-range planning functions, planning engagement and cost recovery of these services.
Additional Comments (optional)	

Contract/Project #2	Insert Information
Name of reference municipality	City of Victoria
Name of Contact and Telephone number	Susanne Thompson, Deputy City Manager, City of Victoria sthompson@victoria.ca (250-361-0573)
Total Value (annual)	n/a
Description of Work	From 2015 to 2019, team member Jonathan Tinney led the planning and building department at the City of Victoria, BC. A major focus of his time there included an assessment and refinement to the departmental structure as well as to process improvements. During his tenure, the dept. took a renewed focus on policy development, more proactive public engagement and design excellence. Outcomes included organizational changes to place more emphasis on the development of neighbourhood level plans. Changes supported a 50% decrease in average development application turnaround times.
Additional Comments (optional)	

Contract/Project #3	Insert Information
Name of reference municipality	City of Toronto
Name of Contact and Telephone number	Michael Mizzi, Michael.mizzi@toronto.ca (416-392-0888)
Total Value (annual)	\$96,000
Description of Work	Prior to joining Stantec, team member Jonathan Tinney led a consulting team that delivered the first strategic plan for the City of Toronto's Planning Division. Developed through a broad consultative process that included several workshops with the department's 250 staff and managers, the plan aimed to streamline the City's planning processes and operating structure, align it with other City departments and programs, and increase the Division's profile within and outside of City Hall. Engagement also included input from major external stakeholders such as BILD, key members of Council and leaders of other city departments.
Additional Comments (optional)	

Proponent: Jonathan Tinney

Signature:  Date July 15, 2020

July 27, 2020  
File: 161489985

Attention: Cally Mann  
Via Email

Dear Ms. Mann,

**Reference: Municipality of Brockton Land Use Development Process Management Review  
Additional Scope**

As requested, we are pleased to provide additional scope of services related to the Land Use Development Process Management Review. We appreciate the opportunity to add value to our initial submission.

We have reviewed existing materials and documentation available on the Brockton website, as well as the RFP, and have developed a list of materials that we feel would be beneficial to the Municipality and those interested in developing property within the Municipality, including the East Ridge Business Park site. Our proposal is to deliver the content and necessary framework for an online "Development Portal" in addition to the scope of work previously provided. The portal would be a 'Build in Brockton' site, which can be integrated into the municipality's existing web structure. Stantec's proposed work scope and deliverable would involve the background research and content development necessary for Brockton to deliver to either their in-house web-team or an IT consultant.

The structure and content of the Development Portal material would include, but not be limited to, the following components:

- **Portal Main Page Content:** Website page structure and content to support creation of easily navigable information page on development process and procedures. Deliverables will include site structure document, finalized text, as well as associated links to associated municipal and County resources (pamphlets and forms, some of which form other deliverables from the project). Generalized advice will be provided on the main page, with links containing more specific details, based on application types/complexity, that will help 'walk developers through the development process'.
- **Vacant Land Inventory:** Plain language text and mapping (GIS layers) associated with any developable, vacant and underutilized lands in Brockton, within associated land use categories (e.g. residential, ICI lands, etc.). Additional details may be incorporated to highlight municipal land sales in the East Ridge Development Park and other municipally-owned lands (parcel area, permitted uses, and other zoning regulations like building envelope, coverage, etc.). GIS Shape files will be provided so that the data can be easily updated as development occurs.
- **Active Development:** Direction on potential mapping of active development applications, based on phase of submission in approval process, to embed within mapping software. Assess current



Reference: Municipality of Brockton Land Use Development Process Management Review Additional Scope

database software applicability, necessary features, data gathering needs etc. to support future development tracker along with direction on next steps to support website integration.

Stantec's team would work to complete this additional work scope over the latter portion of the original project's work scope, and refine and finalize the content based on feedback from municipal staff, Councils, and conversations with developers throughout the course the overall review. Our specific tasks would be executed as follows:

- Use the "External Review" as outlined in the original scope as a basis for this work;
- Clarify needs and necessary resources with the development community;
- Investigate municipal examples, as determined through the Best Practices Review, through follow-up communication with those municipalities to gain understanding of costing and necessary resources for their IT solutions;
- Investigate with County, and or IT staff, the integration of application tracking database, and other vacant land information;
- Drafting processing flowcharts and developer guidance material for review by Brockton staff;
- Final materials to be linked to the Portal will be designed by graphic designer, using Brockton Branding Guidelines.

**Final Deliverable:**

The project deliverable will be documents that can be directly provided to your existing webmaster or outside IT consultant, and edited easily by municipal staff when updates are required. It will contain the associated the technical information or the data in GIS form, with any 'linkable' PDFs that developers could easily print from the Portal. Materials will be provided in AODA accessible formatting. As appropriate, PDF documents will be completed in accordance with the Brockton Branding Guidelines. Original editable files in Microsoft Office Suite compatible files will be provided, such that staff can easily update information as required (contact information, etc.).

Reference: Municipality of Brockton Land Use Development Process Management Review Additional Scope

### **Cost Estimate**

The cost estimate to undertake the tasks above it \$13,300, excluding HST. Our fee estimate includes routine disbursements (printing, travel, etc.). This cost will be considered an upset limit and would not be exceeded without the prior approval of the Municipality. Fees for professional services on this assignment will be invoiced monthly on an hourly basis for actual time spent on the project. Cost estimate assumes that website upgrades will be implemented by the Municipality's existing webmaster/outside IT Consultant based on the resources and outline provided by Stantec.

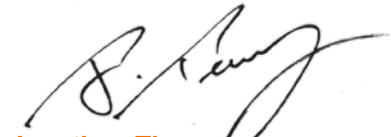
Please feel free to contact us if you have any questions.

Regards,

**Stantec Consulting Ltd.**



**Stephanie L. Bergman** MA  
Planner  
Phone: 519-675-6614  
stephanie.bergman@stantec.com



**Jonathan Tinney** MCIP, RPP  
Lead, Community Development  
Phone: 437-242-8396  
Jonathan.Tinney@Stantec.com

Attachment: Time-Task Matrix – Additional Scope

Reference: Municipality of Brockton Land Use Development Process Management Review Additional Scope



Time Task and Fee Matrix

	Greg Rominack	Jonathan Tinney	Stephanie Bergman	Annela Sloan	Moria Davidson	Mapping / Graphic Design support	Hours Summary		Expenses / Allowances	Sub-Consultants	Total
	\$191	\$210	\$157	\$146	\$135	\$135	Hours	\$			
Additional Scope - Website and Developer Resources											
Mapping Integration		1				15	16.0	\$2,235.00			\$2,235.00
Website Info			2	12	8	8	30.0	\$4,226.00			\$4,226.00
Development Resources (flow charts, guidelines, etc.)				10	15	20	45.0	\$6,185.00			\$6,185.00
Research/calls with other municipalities			4				4.0	\$628.00			\$628.00
Sub-Total (Additional Scope)	0.0	1.0	6.0	22.0	23.0	43.0	95.0	\$13,274.00	\$0.00	0.00	\$13,274.00
	\$-	\$210	\$942	\$3,212	\$3,105	\$5,805					\$13,274.00

**From:** [Sloan, Amelia](#)  
**To:** [Cally Mann](#)  
**Cc:** [Bergman, Stephanie](#)  
**Subject:** RE: Follow Up Questions  
**Date:** Monday, July 27, 2020 3:50:37 PM  
**Attachments:** [let Brockton AdditionalScope fnl 20200727.pdf](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)

---

Hello Cally,

Please see our answers to your questions, as follows:

1. Can you go into further detail about the organizational review aspect of the proposal?

As the RFP notes that an Operational/Organizational Review will be provided by the Municipality (RFP pg. 19), the organizational review component of our work scope (Internal Review) includes a qualitative assessment of existing roles and responsibilities as they relate to customer service and development review. We have a solid base of information on current application protocols and processes through our recent work, so we've assumed this component to include:

- Telephone discussions with a number of front-line and key staff members (4-6)
- Review of select correspondences and exchanges on representative applications (emails, Council reports)
- Review of available operational/organizational reviews
- Identify feedback on potential additional organizational structure changes or revised roles based on outcomes of the application process review
- Findings and recommendations will be discussed and refined through our project team workshop and included in draft reporting.

2. If we added up to 10 in person interviews and two in person reports to Council, what would the added cost be?

We have calculated the costs of ten (10) in person interviews and two (2) in-person Council presentations, and have identified an added cost of **\$5,392.00**. This is inclusive of mileage and expenses, but exclusive of HST. This would result in a project total of \$30,964, inclusive of mileage and expenses, exclusive of HST. Note that we have assumed that efforts would be made to schedule multiple in-person interviews per trip (2-3 trips).

As requested, we have also attached a letter detailing the preparation of additional material (in AODA format and in accordance with Branding Guidelines) including mapping and "developer portal" material. Stephanie Bergman (cc'ed) or I would be happy to answer any questions you may have, and we very much appreciate the opportunity to work through the proposed scope.

Thank you kindly,  
Amelia

**Amelia Sloan** MCIP RPP  
Planner, Community Development

Direct: 519-675-6668  
Mobile: 226-926-8794

[amelia.sloan@stantec.com](mailto:amelia.sloan@stantec.com)