



**THE CORPORATION OF THE
MUNICIPALITY OF CHATHAM-KENT
REQUEST FOR PROPOSALS
FOR
A FRAMEWORK FOR WOODLOT PRESERVATION
RFP # R22-215**

4. Scope of Work

4.1 PROJECT DESCRIPTION

The Corporation of the Municipality of Chatham-Kent requires the services of a professional consulting firm specialized in community consultation and facilitation to review progress made between April 2021 and April 2022 on the issue of woodlot preservation, evaluate and fulfill any additional information needs, assess previously-held stakeholder engagements, arrange any additional stakeholder engagements that might be required, and prepare a framework for the preservation of woodlots in Chatham-Kent.

The pursuit of this project will respond to the directions contained in direction of Municipal Council given on March 28, 2022 which included that Municipal Administration will release a Request for Proposals (RFP) to securing the services of a professional facilitator for the purpose of:

- a. Determining what further information needs to be gathered;
- b. What further stakeholder engagement is needed, if any; and,
- c. Preparation of a preservation framework recommendation regarding options to manage woodlots in Chatham-Kent.

Given the trajectory of the issue over the last year, it is imperative that the Respondent conduct themselves in a neutral manner throughout their work on this project.

Background

The following provides an overview of the most recent origin of the issue of woodlot preservation along with a timeline of key events since April 2021. A selection of links to relevant reports and presentations are included below for ease of reference. A complete list of Reports and presentations provided to Council and the Natural Heritage Committee of the Whole (NHCOTW) is included in Section 4.7 of this Request for Proposal.

- On April 26, 2021, Council approved a motion that introduced a temporary woodlot clearcutting bylaw and directed administration to launch a full public engagement process to seek the public's input on options to manage woodlots in Chatham-Kent.
- Between June 14 and July 9, 2021, the Municipality held an online public engagement process that included the creation of a dedicated project page on the www.letstalkchatham-kent.ca platform, an [online survey](#) and a virtual [world café](#) session held on June 29, 2021. The public engagement process was advertised through a diverse communications campaign that included a corporate press release, ads in all 9 local newspapers, a radio ad campaign, and a direct mail out campaign to over 6000 addresses that featured trees or forest on the properties. Over 1500 residents participated in the survey during the three weeks that the survey was open.
- On August 23, 2021, Council received a [Report](#) summarizing the results of the online public engagement process. At this meeting, Council passed a Motion that approved the creation of the Natural Heritage Committee of the Whole (NHCOTW) and directed Administration to prepare a draft Terms of Reference for the NHCOTW for Council's consideration.

- On September 27, 2021, Council approved the [Terms of Reference for the NHCOTW](#).
- The NHCOTW held its inaugural meeting on November 1, 2021 where it endorsed the Committee's [Meeting Framework and Commitment to Civic Engagement](#).
- At the November 29, 2021 NHCOTW meeting, the Committee received a [Report](#) prepared by the Lower Thames Valley Conservation Authority (LTVCA) summarizing a recently-completed mapping project that assessed changes in forest cover throughout Chatham-Kent between the years 2010, 2015 and 2020. The mapping product was subsequently [published online](#) for public review and comment. At this meeting the Committee also received a second [Report](#) from the LTVCA summarizing the results of its various environmental stewardship programs.
- At the December 13, 2021 NHCOTW meeting, the Committee received a [Report](#) prepared by Administration that provided a segmented analysis of the results of the survey conducted earlier in the year between residents with forested areas on their properties and residents without forested areas on their properties. The report also provided an overview of the three main tools (i.e. education, incentives, regulation) that Municipalities have at their disposal to support the preservation of forests and woodlots. Administration also provided the Committee with a second [Report](#) that discussed natural heritage planning requirements under the Ontario Provincial Policy Statement.
- At the February 14, 2022 NHCOTW meeting, the Committee received a [presentation](#) prepared by Administration that outlined a proposed sequence of decisions and a decision tree that included four (4) Steps. During the meeting, the Committee passed a motion approving a departure from the status quo approach to woodlot preservation (Step 1). A second motion was subsequently passed by the Committee that approved inclusion of the education, incentive and regulation woodlot preservation tools for further investigation (Step 2) and directed Administration to prepare options for the configuration of each woodlot preservation tool.
- At the March 21, 2022 NHCOTW meeting, the Committee received a [Report](#) prepared by Administration that contained material and a proposed process for additional public consultations. The material included configuration options and a suggestion for each of the three woodlot preservation tools of interest to the Committee. The suggestions were based on a review of existing Municipal policy, existing Provincial policy, results from the survey conducted in 2021, and a review of best management practices. The proposed process for additional consultations included posting the material for a 30 day commenting period on the www.letstalkchatham-kent.ca platform and dedicating the April 11, 2022 NHCOTW meeting for receiving deputations and presentations from the public.
- At the March 28, 2022 Council meeting, Council approved a Motion that directed the release of this Request for Proposal and to postpone further activities and meetings of the NHCOTW until a Respondent is retained.

Throughout this time, numerous deputations, emails, letters and other forms of written correspondence were received by Council from the public and on the issue. The topic of forests

and woodlots has historically been, and continues to be politically sensitive in Chatham-Kent. The issue is characterized by complexity which is due in part to the diversity of views present in the community, the existence of a multitude of factors, competing pressures and potential courses of action, the large body of information generated on the matter, the potential resource implications and the impacts that might be felt by different segments of the community depending on how the issue is ultimately dealt with moving forward. Given this history, the ability of the Respondent to demonstrate neutrality and impartiality throughout this project is of utmost importance and will be key to the success of the project.

4.2 APPROACH AND TASKS

The purpose for this project is for the Respondent to develop a recommendation for a woodlot preservation framework to the municipal Council of Chatham-Kent. The recommendation will be developed in accordance with the Council-approved project plan proposed by the Respondent and based on a combination of previously completed work as well as any additional information gathering and community engagement work undertaken by the Respondent.

The scope of work for this project includes and is limited to the directions included in the Motion passed by Council on March 28, 2021:

- a. Determining what further information needs to be gathered;
- b. What further stakeholder engagement is needed, if any; and,
- c. (The) preparation of a preservation framework recommendation regarding options to manage woodlots in Chatham-Kent.

Each of these items along with a project start up item are expanded upon below.

As is discussed in more detail in Section 4.3 below, it is important to note that the Respondent will be responsible for leading all major activities and for serving as the public face of the project going forward. Administration's role in this project will be limited to providing administrative support to the Respondent for each project task but will not include leading public engagement activities, preparing or delivering presentations to the public or to Council.

Task #1: Project Start-Up

Immediately after the award of the contract, Municipal staff and the Respondent will meet to confirm the project scope, deliverables, and a timeline for the project (Project Kickoff Meeting). All previously prepared information, background data, engagement results, deputations received from the public and the timeline of key events will be provided by Municipal staff to the Respondent. The Respondent will undertake a document review and prepare a Project Plan that addresses all three directions contained in Council's Motion from March 28, 2022. The document review will be undertaken using a three-pronged lens that is based on, and applies equal weight to the concepts of fairness, accuracy and sufficiency as described below.

- Fairness: Impartiality and just treatment without favoritism or discrimination.
- Accuracy: The quality of being correct or precise.
- Sufficiency: The quality of being adequate or having enough of what is essential.

With regards to Direction A – determining what further information needs to be gathered – the Respondent will review the information that has been previously provided to Council and the Natural Heritage Committee of the Whole, identify whether any additional information needs

exist, specify the additional information needs that have been identified, and provide an analysis and justification.

With regards to Direction B – determining what further stakeholder engagement is needed, if any – the Respondent will review all previously-held public engagement activities and opportunities for public input, determine if additional engagement activities are required, specify the additional engagement activities, and provide an analysis and justification. If the Respondent determines that additional stakeholder engagements are required, the Respondent will prepare a Stakeholder Engagement Plan that is based on the [Spectrum of Public Participation](#) developed by the International Association for Public Participation. The Stakeholder Engagement Plan will specify at a minimum:

- The number of additional engagement activities;
- The purpose for each engagement activity;
- The form of each engagement activity (i.e. surveys, virtual meetings, in-person meetings, community forums, etc.);
- The targeted IAP2 level of public participation for each engagement activity;
- Target audiences and participants;
- The communications and awareness building activities to promote the stakeholder engagements and opportunities to provide input;
- Any resource requirements; and,
- A timeline for undertaking the stakeholder engagement process.

With regards to Direction C – preparation of a preservation framework recommendation regarding options to manage woodlots in Chatham – the Respondent will review previous decisions and motions made by Council and the Natural Heritage Committee of the Whole and develop a proposed process for the preparation of a recommendation to Council on the matter.

The Respondent will summarize this work into the Project Start-Up Report and an accompanying PowerPoint presentation that the Respondent will present to Council for approval. The Respondent will be responsible for making any changes to the Project Start-up Report should they be requested by Council.

Task #2: Determining Further Information Needs

If, as part of Task #1, the Respondent has determined that no additional information is required, Task #2 will be skipped. However, if as part of Task #1 the Respondent has determined that additional information is required to support Council's decision-making process, the Respondent will lead the additional information gathering activities. This work may include but not be limited to undertaking literature reviews, best management practice (BMP) reviews, municipal and provincial policy reviews, interviews with subject matter experts or any other form of research that might be needed to generate the additional information that is required. The Respondent will summarise this work into an Additional Information Report and PowerPoint presentation that will be authored and delivered to Council directly by the Respondent.

Task #3: Further Stakeholder Engagement

If as part of Task #1, the Respondent has determined that no additional stakeholder engagement is required, Task #3 will be skipped. However, if as part of Task #1 the Respondent has determined that additional stakeholder engagement is required, the Respondent will lead the additional stakeholder engagement activities in accordance with the

Council-approved stakeholder engagement plan developed in Task #1. The Respondent will be responsible for leading the additional engagement activities, summarizing the input provided by stakeholders and reporting the results to Council in the Summary of Stakeholder Engagement Report and PowerPoint presentation that will be authored and delivered directly to Council by the Respondent.

Task #4: Woodlot Preservation Framework

In Task #4 the Respondent will develop a proposed woodlot preservation framework for Council's consideration that includes recommendations for the Education, Incentive and Regulation woodlot preservation tools. The framework will be based on previously generated information, previous public engagement activities led by the Municipality, previously approved Motions of Council and the Natural Heritage Committee of the Whole, as well as the results of Task #1, Task #2 and Task #3. In developing the proposed woodlot preservation framework, the Respondent will apply their professional judgment and provide transparent justification for decisions made throughout, particularly as it pertains to the evaluation and weighting of different pieces of information that the Respondent will have considered when developing recommendations. This work will be summarized in the Recommended Woodlot Preservation Framework Report and PowerPoint presentation that will be authored and delivered directly to Council by the Respondent.

4.3 PROJECT TEAM

The project management structure for the project will involve a project team consisting of the successful Respondent's staff acting in a project leadership capacity - and Municipal Staff acting in a support capacity. The Respondent will be responsible for developing and executing the project plan, decision making, preparing deliverables and communicating with Council and the public. The Respondent will ultimately report to, and be accountable to Municipal Council. Administrative staff will provide the Respondent with previously generated information, assistance regarding the logistics of engagement activities such as configuring and adding content to the www.letstalkchatham-kent.ca online engagement platform, identifying locations for in-person engagement events and promoting engagement activities. Municipal staff will also assist the respondent with the Council meeting process such as adding items to meeting agendas and providing technical assistance for presentations to Council.

In terms of data, Section 4.7 of this document contains a list of publicly accessible data that has been previously provided to Council and the Natural Heritage Committee of the Whole on the matter. Municipal staff will provide additional background information to the successful Respondent.

The proposal should reflect an understanding of the relationship between the Successful Respondent, Municipal Administration, and Council, and outline the resources anticipated from the Municipality.

4.4 PUBLIC CONSULTATION

As was previously mentioned, need for, nature of, and extent of any additional stakeholder engagement activities will be reviewed and proposed by the Respondent and approved by Council at the conclusion of Task #1. However, at this time it is anticipated that some form additional stakeholder engagement will take place, as this point has been regularly discussed by the Natural Heritage Committee of the Whole and was the focus of the last Report that

Administration presented to the Committee prior to Council's decision to issue this Request for Proposal. All public engagement activities undertaken by the Respondent are required to adhere to the Spectrum for Public Engagement Developed by the IAP2 and the level of public participation employed for each engagement activity shall be clearly communicated to the public. The Respondent will be expected serve as the spokesperson for the project, leading engagement activities, receiving input from the community, summarizing input received and communicating the results to Council.

4.5 DELIVERABLES

At this time, only Task #1 and Task #4 are guaranteed to be included in the scope of the project. Whether Task #2 or Task #3 are included in the scope of the project will only be known at the conclusion of Task #1. Notwithstanding this uncertainty, the Respondent should anticipate that the deliverables associated with Task #1, Task #2, Task #3, and Task #4 would be required and structure their proposal accordingly. As such, the following deliverables shall be included in Respondent proposals:

Task #1

- Project kickoff meeting agenda and meeting minutes
- Project Plan
- Stakeholder Engagement Plan
- Project Start-Up Report
- Project Start-Up Presentation
- Presentation to Council

Task #2

- Additional Information Report
- Additional Information Presentation
- Presentation to Council

Task #3

- Summary of Stakeholder Engagement Report
- Summary of Stakeholder Engagement Presentation
- Presentation to Council

Task #4

- Recommended Woodlot Preservation Framework Report
- Recommended Woodlot Preservation Framework Presentation
- Presentation to Council

4.6 PRICING

As was previously mentioned, it is certain that Task #1 and Task #4 will be included in the scope of the project. However, until Task #1 is completed, it is uncertain whether Task #2 or Task #3 will be included in the project scope or the amount of work that will ultimately be required under each of these tasks. This creates a challenge with regards to proposal pricing, which for the Municipality centers around the need to protect the integrity of the procurement process by ensuring comparability and a fair evaluation of any proposals that might be received.

To address this challenge, Respondents shall structure the pricing sections of their proposals to include 2 sections:

- Section 1: Base Pricing – Task #1 and Task #4
- Section 2: Scenario Pricing – Task #2 and Task #3

Each section is described in more detail below.

Section 1: Base Pricing – Task #1 and Task #4

The Base Pricing section shall include all Respondent fees and disbursements associated with completing Task #1 and Task #4. The Base Pricing section shall include an itemized pricing schedule for each of the sub-tasks associated with Task #1 and Task #4 listed below along with the hourly rates for any staff the respondent proposes to involve:

Task #1:

- Project Kick-off meeting
- Document Review
- Project Plan
- Stakeholder Engagement Plan
- Project Start-Up Report
- Project Start-Up Presentation
- Presentation to Council

Task #4:

- Recommended Woodlot Preservation Framework Report
- Recommended Woodlot Preservation Framework Presentation
- Presentation to Council

Section 2: Scenario Pricing – Task #2 and Task #3

The Scenario Pricing section shall be based on the following scenarios which have been developed to provide a basis for comparison and fair evaluation between any proposals that might be received. It is important to note that these pricing scenarios may not end up reflecting the actual scope of work associated with Task #2 or Task #3, as this will only be determined at the conclusion of Task #1. It should also be noted that the fees provided by the Respondent throughout Section 2 shall form the basis for actual project invoicing. The Scenario Pricing section shall include an itemized pricing schedule for each of the actions and sub-tasks listed below along with the hourly rates for any staff the respondent proposes to involve:

Task #2:

- 20 billable hours of additional information gathering and/or research activities
- 10 billable hours for the preparation of the Additional Information Report
- 5 billable hours for the preparation of the Additional Information Presentation
- 2 billable hours for the delivery of the Additional Information Presentation to Council

Task #3:

- Additional community engagement activities:
 - o The development of one survey for the www.letstalkchatham-kent.ca online platform
 - o The completion of four 1-hour long zoom calls with stakeholder groups
 - o The completion of one 2-hour long facilitated “world café” style zoom community engagement session with up to 100 members of the community

- The completion of four (4) 2-hour long in-person “world café” style community engagement sessions with up to 100 members of the community at each session and solely facilitated by the Respondent.
- 20 billable hours for summarizing the input received through the additional community engagement activities.
- 10 billable hours for the preparation of the Summary of Additional Stakeholder Engagement Report
- 5 billable hours for the preparation of the Summary of Additional Stakeholder Engagement Presentation
- 2 billable hours for the delivery of the Summary of Additional Stakeholder Engagement Presentation to Council

4.7 SCHEDULE

The Respondent shall provide a Gantt chart style schedule, which proposes a completion date.

4.8 RELEVANT BACKGROUND DOCUMENTS

1. <https://pub-chatham-kent.escribemeetings.com/filestream.ashx?DocumentId=4233>
2. <https://pub-chatham-kent.escribemeetings.com/filestream.ashx?DocumentId=4234>
3. <https://pub-chatham-kent.escribemeetings.com/filestream.ashx?DocumentId=4235>
4. <https://pub-chatham-kent.escribemeetings.com/filestream.ashx?DocumentId=4463>
5. <https://pub-chatham-kent.escribemeetings.com/filestream.ashx?DocumentId=5342>
6. <https://www.letstalkchatham-kent.ca/natural-heritage-planning>

4.9 TECHNICAL PROPOSAL – File #1

All proposals must include the following information:

Corporate Profile:

- An overview of the submitting firm, including descriptions of overall organization, staff and services offered.
- Identification of a **minimum of 3 relevant projects** of similar scope and magnitude completed as the prime consultant. Provide project details, construction values and innovative solutions. Please provide one client reference for each project.

Project Methodology:

- Identification of specific personnel to be charged with the scope of the project, including their relevant qualifications, experiences, anticipated roles and project availability. Also include the backup personnel for each individual on the project.
- Clear and distinct identification of the procedures to be implemented by the Successful Respondent to achieve a successful project with respect to schedule, quality and budget. (Only hours to be included in Envelope #1, not costs).
- A clear outline of the Respondents schedule and any critical path items.

- Clear and distinct identification of hours to be spent. (Only hours to be included in Envelope #1, not costs)
- Any other services required to successfully complete the project.

Value Added Services and Innovation:

- Identification of any innovative techniques or value added to services.
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Note – no financial information should be included in the Technical file. If financial information is contained in this file, the Respondent's submission may be rejected.

4.10 FINANCIAL PROPOSAL – File #2

All proposals must include the following information:

Consulting Fees:

- Itemization of all fees associated with all tasks and sub-tasks.
- Itemization of all fees associated with sub-consultants, assistance, advisors, disbursement, mileage etc.
- Identification of fees associated with applicable staff (fee schedule) for all aspects of the project.
- All fees must be clearly stipulated. All tasks, meetings etc. envisioned by the Respondent must be identified. The Respondent shall clearly indicate in the proposal any exceptions or qualifications and additional costs / credits thereof.

4.11 CLOSURE

Information to Respondents:

- By submitting a formal written proposal for this project, the Respondent acknowledges that the submitting firm has reviewed all available materials and personally attended the site to visually inspect the project limits in a manner sufficient to allow for the formation of a sound professional assessment and corresponding work program.
- Submissions must score at least 70% of the maximum on the evaluation matrix to have their fee envelope opened. Failure to achieve this minimum grade will result in a non-compliant submission.
- As indicated earlier, all proposals will be subject to evaluation by a Senior Proposal Review Committee. This Committee will be assembled and chaired by the Director, Planning Services and will contain staff from the Community Development Department. *(Appointment of the Successful Respondent will ultimately be subject to approval by Chatham-Kent Council or designated authority).*

- The successful firm, upon execution of the appropriate agreements and under license, may gain access to the Municipality's aerial mapping, assessment information, AM/FM data and any other information that may be relevant to this undertaking.