



NOTTAWASAGA VALLEY CONSERVATION AUTHORITY
REQUESTS FOR PROPOSAL 02/2017

for

INTEGRATED WATERSHED MANAGEMENT PLAN

Proposals will be received by the Nottawasaga Valley Conservation Authority (NVCA) as follows:

- One original (1) hard copy of the Proposal to be submitted, in a sealed envelope clearly marked "RFP 02/2017, Integrated Watershed Management Plan".

Completed proposals will be received until 2:00 p.m. local time on Friday, January 19, 2018, and directed to:

Chris Hibberd, Director Watershed Management Services
Nottawasaga Valley Conservation Authority
8195 8th Line
Utopia, ON, L0M 1T0

Late proposals will not be considered and will be returned to the proponent. Proposals submitted via email will be accepted if accompanying a hard copy submission. Note that if submitting via email, the hard copy must still be received by the submission deadline.

This time and date will be deemed to be the closing of the Proposal. For more information on Proposal submission see Section 4.4 of this Request for Proposal.

Proposal details follow.

Addendum 1 - Clarifications - added as page 18, Jan 4, 2018

1.0 Purpose

The purpose of this project is to complete an Integrated Watershed Management Plan (IWMP) for the Nottawasaga Valley watershed which will guide the Board of Directors and staff toward a focused watershed management program while maximizing efficiencies in all NVCA-lead programs.

It is important to note that public consultation is a key component of this project to achieve NVCA's values of transparency, collaboration and integrity. Therefore a protocol for consultation with all anticipated users of the completed IWMP is a key and required component in the plan's development.

2.0 About the NVCA

NVCA, formed on May 5, 1960, is a local watershed management, not-for-profit corporation that delivers services and programs that protect, restore and manage water and other natural resources in partnership with local municipalities, government, landowners and other organizations and agencies.

Legislative mandate is provided through Section 20 (1) of the *Conservation Authorities Act* that directs the NVCA

to establish and undertake, in the area over which it has jurisdiction, a program designed to further the conservation, restoration, development and management of natural resources other than gas, oil, coal and minerals (R.S.O. 1990, c. C.27, s. 20).

NVCA's jurisdiction covers 18 municipalities in the counties of Simcoe, Dufferin, and Grey, and the western part of the City of Barrie. NVCA is funded mainly through municipal levies and self-generated revenues, with some additional funding from provincial and federal grants. The authority is governed by an 18 member Board of Directors appointed from the each of the respective municipalities, with an elected executive. Additional information about NVCA can be found at nvca.on.ca.

It is the responsibility of Ontario's conservation authorities—responsibility entrusted to us by the *Conservation Authorities Act*—to understand and manage the natural environment on a watershed basis. It is also the authority's responsibility to inform the community so that stakeholders may undertake activities in a manner which sustains the health of the watershed.

NVCA's role in managing aspects of the watershed has evolved in its nearly 60 year history. Science-based watershed management plans have played an integral role in the NVCA management strategy, providing a decision-making tool which balances environmental interference with communities' continued growth and development. Through watershed management planning, NVCA better understands

the region's natural resources and in turn is better able to predict the outcomes and/or risks associated with certain activities and/or events.

2.1 IWMP for the Nottawasaga Valley

An Integrated Watershed Management Plan (IWMP) is a key tool to ensure that the overall balance between human and economic needs and the needs of the natural environment are maintained.

NVCA's current Watershed Management Plan, formulated 21 years ago, is now outdated. Many of the recommendations set out in the original plan have been carried out, NVCA's area of jurisdiction and role have changed, new information and a better appreciation for watershed features and functions have emerged, and new management options and tools are now available.

A new IWMP is needed to provide long-term guidance for NVCA management activities.

The development of a new IWMP will support member municipalities and upper tier municipalities in responding to the climate change requirements in the updated Provincial Policy Statement and provincial Growth Plan. Further, it will support the watershed management components now required under the Growth Plan.

As a result of governmental shifts over the last 20 years, NVCA has undertaken or continued programs which complement our role as watershed managers. These programs include, but are not limited to:

- Municipal Plan Review – Conservation authorities have delegated responsibilities to represent provincial interests regarding natural hazards encompassed by Section 3.1 of the Provincial Policy Statement, 2005 (PPS, 2005). NVCA also has provided planning advice related to Section 2 (Wise Use and Management of Resources) of the Provincial Policy Statement 2005, to its member municipalities through memorandums of understanding;
- Commenting Agency – In addition to our commenting role under the *Planning Act*, NVCA also provides environmental planning advice under the *Aggregate Resources Act*, *Niagara Escarpment Plan* and *Environmental Assessment Act*; and,
- Drinking Water Source Protection – NVCA was established as a Drinking Water Source Protection Authority under the *Clean Water Act* and as such is involved in the development and implementation of the South Georgian Bay Lake Simcoe Region Source Protection Plan.

A new IWMP is necessary for NVCA to evolve as an agency and to continue the management cycle as stewards of the watershed for the effective protection of people and property. An IWMP addresses diverse issues and objectives, and

enables planning for various outcomes to accommodate the complexity and uncertainty associated with the future of the natural environment.

In developing an IWMP it is imperative that the current state of the watershed, our watershed management resources, our management practices as well as watershed stressors be identified and assessed. Key among these stressors is our changing climate and the anticipated growth in the watershed over the next decades.

3.0 Scope of Work

3.1 Project Objectives

IWMP is the process of managing human activities and natural resources on a watershed basis. This approach allows us to protect important water resources, while at the same time addressing critical issues such as the current and future impacts of rapid growth and climate change.

NVCA's IWMP intends to achieve or address the following:

- Complete a lifecycle costs/asset management analysis as part of a larger watershed characterization.
- Gather updated information on watershed characteristics (topography, land use, stream morphology, existing stream flow, and watershed runoff coefficients) through various means, including stakeholder engagement.
- Engage stakeholders in the process, particularly during the development of strategies and options. This should include defining a dispute resolution process before the work begins to address any differences develop later in the process.
- Provide a mechanism for public consultation and review of the proposed IWMP.
- Provide recommendations to enhance or address:
 - Water quality and quantity;
 - Flood and erosion management;
 - Resilient biodiversity and habitats;
 - Sustainable economic and recreation opportunities;
 - Improved quality of life and neighbourhood desirability; and,

- Greater ability for the watershed to adapt to the impacts of climate change, urbanization and other stressors.

3.2 Project Deliverables

The project tasks and deliverable dates are as follows:

- Task 1: Watershed Characterization report– winter 2018
- Task 2: Identify Watershed Issues – spring 2018
- Task 3: Develop Strategies and Plan report – summer 2018
- Task 4: Prepare Draft IWMP – fall 2018
- Task 5: Final Plan Approval – spring 2019

Consultation and review associated with these deliverables will consist of the following:

- Initial start-up meeting with NVCA Internal Project Team to develop a Terms of Reference for the project. It is anticipated the successful consultant's project proposal will form the basis for the Terms of Reference;
- Meeting minutes, including those from the initial start-up meeting and any other meetings with NVCA staff and/or Steering Committee, shall be taken by the Consultant and submitted to the NVCA within 2 weeks of each meeting;
- Notice of Commencement to the public, development community and member municipalities;
- Presentation of drafts and consultation with NVCA staff, the Steering Committee and NVCA Board of Directors;
- Presentation of drafts and consultation with the general public;
- Presentation of drafts and consultation with development community and member municipalities;
- Presentation of the Report to NVCA Board of Directors.

3.3 Project Team and Stakeholder Engagement

The following lists the groups that the chosen consultant will be required to engage through the development of the IWMP:

- Internal Project Team: NVCA has formed an internal project planning comprised of the various program areas. The team will participate in the

engagement of a project consultant, and provide ongoing project management support. This team will also provide input into the draft plan, drawing on information from the various on-staff experts at the NVCA.

- **Stakeholder Engagement:** NVCA will identify a list of key stakeholders, including member municipalities and local first nations, among others, for the Stakeholder Steering Committee. These groups will be invited to sit on the Steering Committee.

The Steering Committee will oversee background work as it progresses and shall guide the preparation of the IWMP. Stakeholder representatives will provide input and direction on behalf of their affiliations to ensure that the plan is both comprehensive and “integrated” in meeting the needs of NVCA and reflects the interests of the identified partners.

Note that all member municipalities will be notified of the IWMP exercise at the beginning of the process. Planning staff and/or municipal clerks will actively be engaged in the process.

3.4 Public Consultation

NVCA, in partnership selected consultant, will develop a public consultation process that provides the public opportunities to provide input into developing meaningful and transparent action strategies.

One of the considerations in designing points of consultation is compliance with the Conservation Authority Class Environmental Assessment (EA) Process. While it is not the intent to prepare the IWMP as a Class Environmental Assessment, paralleling the processes may create flexibility in approvals needed in the future for implementing some of the recommended action strategies (or at least those dealing with flood and erosion remedial activities).

3.5 Accessibility of Integrated Watershed Management Plan

All public-facing items, including but not limited to meeting minutes, draft reports and final reports, must be prepared and submitted to NVCA in such a way to meet the information and communications standards under the *Accessibility for Ontarians with Disabilities Act (AODA)*.

Further, any IWMP-development processes that have a public component, for example a public information session or a survey, must be developed with regards to the AODA.

4.0 Proposal Information & Instructions

4.1 Communication Regarding the Request for Proposal (RFP)

All communication concerning this RFP shall be in writing via email only and directed to Chris Hibberd, Director, Watershed Management Services, c.hibberd@nvca.on.ca.

No person other than the above named person or his authorized representative is authorized to speak for NVCA with respect to this RFP. A Proponent who seeks to obtain information, clarification or interpretation from another NVCA employee or member of the NVCA Board of Directors, is advised that such material is used at the Proponent's own risk, and NVCA will not be bound by any such representations.

Answers to questions and clarifications may be released in the form of an addendum should NVCA determine the information is relevant to all Proponents. Any questions shall be sent to the Director by January 15, 2018.

4.2 Addendum to the RFP

The Proponent is advised that any changes to the RFP shall only be done by formal written addendum issued by the Director. NVCA hereby reserves the right in its sole discretion to amend this RFP any time prior to the closing date and time.

4.3 Cost of Responding to the RFP

All costs directly or indirectly incurred by the Proponent in responding to this RFP shall be at the sole cost of the Proponent.

4.4 Submission of Proposal

A sealed Proposal Package shall be submitted at or before the closing date and time of **Friday, January 19, 2018, at 2:00 p.m., local time.**

Clearly address the Proposal Package to:

Chris Hibberd, Director Watershed Management Services
Nottawasaga Valley Conservation Authority
8195 8th Line
Utopia, ON, L0M 1T0

Re: RFP 02/2017 Integrated Watershed Management Plan

Provide the Company Name and the return address information on the outside of the Proposal Package.

A Proposal delivered after the closing date and time shall not be accepted or considered and shall be returned to the Proponent unopened.

Proposals submitted via email will be accepted if accompanying a hard copy submission. Note that if submitting via email, the hard copy must still be received by the submission deadline.

The Proposal shall be irrevocable for any reason for a period of not less than one hundred-twenty (120) calendar days following the closing date.

4.5 Municipal Freedom of Information and Protection of Privacy

NVCA is required by law to adhere to the requirements of the *Municipal Freedom of Information and Protection of Privacy Act*, as amended. Any Proponent who requires that the information in its Proposal be kept confidential shall explicitly advise NVCA of that fact by stamping or boldly marking the information as Confidential. Release of any information not marked as confidential will be in compliance with MFIPPA. Proposal results are reported to the NVCA Board of Directors and the reports are for public information.

NVCA may be required to submit information of the Proposal or Proposal Packages received to granting agencies for outside funding. The Proponent will not be notified of such a requirement.

4.6 Proposal Package Submissions Information Release to Other Proponents

The number of Proposals received and the names of the Proponents are confidential and shall not be divulged prior to the closing of the RFP.

4.7 Request to Withdraw a Proposal Package Submission

Requests for withdrawal of a Proposal shall be allowed if the request is made before the closing date and time for the Proposal to which it applies. Requests shall be directed to the Director by an Authorized Agent of the company, in writing, via email, confirming the details. Telephone requests will not be considered. The withdrawal of a Proposal does not disqualify a Proponent from submitting another Proposal on the same service.

4.8 Proposal Returned Unopened

A Proposal Package received after the closing time shall be disqualified and information regarding the proponent will be noted with the original file. The proposal will be returned to the Proponent unopened.

4.9 Submission of More Than One Proposal Package

If two Proposals for the same RFP are received in the same envelope, the Proposals shall be contained in separate envelopes within the exterior envelope and shall be marked as Proposal A and Proposal B.

If two Proposals for the same RFP are received in different envelopes, the envelope with the latest date and time received shall be considered the intended Proposal.

4.10 Adjustment to a Proposal Package

Adjustments by telephone, facsimile (fax), email or letter to a Proposal Package already submitted will not be considered. A Proponent desiring to make adjustments to a Proposal shall withdraw the Proposal and/or supersede it with a later Proposal submission prior to the specified Proposal closing date and time.

4.11 Erasures, Overwriting or Strike-outs

The Authorized Agent signing on behalf of the organization, shall initial erasures, overwriting or strike-outs on all parts of the original submission.

4.12 Cancellation of Request for Proposal

NVCA reserves the right to cancel the RFP at any point in the process without liability.

5.0 Proposal Terms & Conditions

NVCA reserves the right to approve or reject members of the project team assigned to NVCA and further reserves the right to approve or reject any replacement staff once the original audit team has been assembled.

5.1 Omissions, Discrepancies, Clarifications and Addenda

Considerable effort has been made to ensure an accurate representation of information in this Proposal document; however, it is not guaranteed to be accurate, nor is it comprehensive or exhaustive. Nothing in the RFP is intended to relieve the Proponent from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

Should a Proponent be in doubt as to the meaning of any part of the RFP, it will be the Proponent's responsibility to immediately notify the Director in writing.

If NVCA considers that a correction, explanation or interpretation is necessary, an addendum will be issued to all who have registered their interest in the Proposal.

5.2 Allocation of Risk

NVCA shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Proponent by reason of non-acceptance by NVCA of any Proposal submission or by reason of any delay in its acceptance.

5.3 Conflict Of Interest

The Proponent is required to submit a conflict of interest declaration of any potential conflict of interest or perceived conflict of interest with their Proposal Package. This may be submitted in the form of a letter.

Failure by a Proponent to declare any potential conflict of interest shall be grounds for NVCA to disqualify a Proposal or terminate any Contract formed without liability to NVCA.

5.4 Lobbying

In order to ensure fairness to all Proponents, NVCA shall endeavor to prevent unfair advantage created by lobbying. Therefore, NVCA reserves the right to disqualify, at any time and at its sole discretion, any Proponent engaging in lobbying in connection with a competitive process between a date that is no later than the date of issue of the document and the date of signing of a contract between NVCA and the successful Proponent(s). NVCA may disqualify a Proponent at any time in the procurement process, including after the selection process has been completed.

Lobbying may include any activity that NVCA, in its sole discretion, determines has or may give an unfair advantage to one Proponent relative to other Proponents. Without limiting the foregoing, lobbying may include:

- Verbal or written approaches to any NVCA staff other than those identified as contacts in the procurement document.
- Verbal or written approaches to any NVCA Board of Directors
- Verbal or written approaches to any member of the Proposal Evaluation Committee.

6.0 Proposal Package

6.1 Proposal Understanding and Methodology

The Proponent is required to provide a brief summary of their understanding of the objectives of this RFP, and a detailed methodology that describes key elements of their proposed approach to meeting the objectives and deliverables of the Scope of Services in Section 3 of this RFP.

6.2 Qualifications

The Proponent is requested to provide detailed information that clearly demonstrates their qualifications, experience, and proof of a valid public accountant's license. The Proponent shall identify its team members and their qualifications and the resources available to deliver the services required.

The project team being sought will have demonstrated knowledge and experience in the following areas:

- Watershed Management
- Wetland ecology
- Water quality
- Fish and Wildlife
- Forestry and Recreation
- The protection of life and property
- Surface water hydrology as it relates to flooding and drought
- Planning and regulatory environment
- Basic applied impact assessment
- Policy creation

- Natural heritage systems
- Climate Change

6.3 References/Experience

Proponents are required to provide at least three (3) references as part of their proposal and to include the names and contact numbers of persons who can certify the Proponent's ability to develop an IWMP relative to the requirements of this RFP.

6.4 Financial Considerations

The proponent shall provide the following information on fees for preparing an IWMP including:

- an estimate of the total hours of work required to complete the audit, broken down by major anticipated tasks;
- the hourly rates for the members of its team;
- the identification of additional costs or disbursements, and an estimate of those costs and rates used to calculate such, including meetings with staff, Board of Directors and committees thereof;
- a pricing structure for any special work(s); and,
- a total estimate of the cost for the complete IWMP.

NVCA will not request additional information around the financial consideration and incomplete Proposals will affect the evaluation and may disqualify a Proponent.

6.5 Value Added Service

Proponents are requested to consider and describe any value added features of their proposal for NVCA to consider and evaluate.

7.0 Evaluation and Proposal Selection

7.1 Evaluation of Proposal Package

Proposals determined to be compliant with the requirements of this RFP will be evaluated by a committee and the recommendation for selection of a Proponent will be based on the results of the evaluation criteria.

The Proposal will be subject to a comprehensive analysis and evaluation, based upon the best overall value to NVCA. The Proposal Package will be checked for compliance with the mandatory requirements in this RFP document. Based on the assessment of compliance with mandatory requirements, NVCA may disqualify Proposals and Proponents it determines in its sole discretion are non-compliant.

Proponents receiving the highest overall ranking for their submission may, at the sole discretion of the Selection Committee, be invited to make a presentation to the selection committee. Any costs for this or any interview will be the responsibility of the Proponent. The Proponent must be available for an interview, if required by the committee, within a reasonable time period.

No other Proponent is entitled to be present or to receive any information regarding the presentation of any proponent.

7.2 Terms of Award

1. The lowest of any Proposal will not necessarily be accepted;
2. NVCA reserves the right to award any portion of the Proposal to a Proponent;
3. Proposals are irrevocable for One Hundred and Twenty (120) days from the date the Proposal is opened;
4. The award of this contract is subject to approval of NVCA Board of Directors and the availability of funding; and
5. An award is non-exclusive to the Proponent.

7.3 Negotiations

NVCA may award the RFP on the basis of proposals received without discussion; however, NVCA reserves the right to enter into negotiations with the selected proponent(s). If NVCA and the selected proponent cannot negotiate a successful agreement, NVCA may terminate the negotiations and begin negotiations with another proponent. This process will continue until an agreement has been executed or all of the proponents have been rejected. No proponent shall have any rights against NVCA arising from negotiations.

The proponent will assume all costs incurred in providing responses to the RFP and for providing any additional information required by NVCA to facilitate the evaluation process.

NVCA reserves the right to discontinue the RFP process at any time and makes no commitments, implied or otherwise, that this process will result in a business transaction with one or more proponents.

7.4 Selection for an Award

Upon receiving Board approval to award the Proposal, NVCA shall contact the selected Proponent via the contact person named.

A formal contract between NVCA and the successful Proponent(s) will be entered into for the development of the IWMP. The Proposal will form part of the contract.

7.5 Insurance

The proponent will be required to furnish NVCA with a certificate of Professional Liability Insurance in an amount not less than \$5,000,000 on a per claim basis, and General Liability Insurance in an amount not less than \$5,000,000 on a per occurrence basis. NVCA must be an additional named insured on the General Liability Insurance for the purpose of this contract. The Insurers shall, by registered mail, provide NVCA with thirty (30) days written notice if the insurance of either policy is cancelled.

7.6 Workplace Safety Insurance Board Clearance Certificate (WSIB)

The Proponent shall submit with the proposal document a satisfactory clearance certificate from the Workplace Safety and Insurance Board (WSIB) stating that all assessments or compensation payable to the WSIB have been paid.

8.0 Form of Proposal

Please return all of this Section with the Proposal Package submission.

Contact Information of the Proponent

Legal Name of the Proponent:

Mailing and Courier Delivery Address with Postal Code:

Telephone:

Web Address:

Contact Person and Their Title:

Contact's Telephone:

Contact's Email:

Proponent Request for Proposal Declaration—RFP No. 02/2017

I/We, hereby confirm, that I/We have authority to make this declaration on behalf of _____ (company name/proponent) and to bind the Proponent to the contents of the proposal.

I/We declare that the Proposal is NOT made in connection with any other Proponent submitting a Proposal for the same services or work and is in all respects fair and without collusion or fraud and that full disclosure has been made of any conflict of interest or potential conflict of interest.

I/We hereby confirm, having carefully reviewed the Request for Proposal that we are able to provide and pay for all material, labour, tools, and delivery, necessary to complete the Integrated Watershed Management Plan as specified in accordance with our Request for Proposal.

It is certified that the undersigned is/are authorized, appointed and empowered to sign and submit this Proposal and bind them to its offer, terms and conditions.

Sign Here If Sole Proprietor

Executed by me and bearing date this ____ day of _____, 2018.

Authorized Agent Signature

Print Name and Title

Operating As or Doing Business As

- OR -

Sign Here If Corporation

Executed by me/us and bearing date this _____ day of _____, 2018.

I/we have the authority to bind the Corporation

Print Name and Position Held

I/we have the authority to bind the Corporation

Print Name and Position Held

Note:
If the Proposal is submitted by or on behalf of a Corporation, it shall be signed in the name of such corporation by the duly Authorized Agent.

Mandatory:
Submit in Proposal Package the original signature on the Acknowledgement Section 8 – electronic copies of signatures shall be rejected and the Proposal disqualified.

RFP 02/2017 – ADDENDUM #1

- Section 6.2: The first line should read as follows: “The Proponent is requested to provide detailed information that clearly demonstrates their qualifications, experience, and proof of any valid public accountant licenses.”
- Section 6.4: The first bullet should read as follows: “an estimate of the total hours of work required to complete the IMWP audit, broken down by major anticipated tasks.”
- Project Timelines: NVCA has secured funding through the Federation of Canadian Municipalities. The funding approvals require NVCA to produce deliverables at certain intervals in the project timeline. The RFP has been structure to reflect these matters. To aid in the completion of the various tasks NVCA will share or provide key existing available information pertinent to the tasks.
- Dispute Resolution: NVCA is requesting that submitted proposals include dispute resolution process and at this point in time there are specific details on the expectations for the process.
- Public Engagement: As noted in the RFP, one of the considerations in designing points of consultation is compliance with the Conservation Authority Class EA Process. While it is not the intent to prepare the Integrated Watershed Plans as a Class Environmental Assessment, paralleling the processes may create flexibility in approvals needed in the future for implementing some of the recommended action strategies (or at least those dealing with flood and erosion remedial activities). One of the key elements of a Class EA process is public contact.
- Stakeholder Consultant: There is an expectation that proposals will outline the engagement key stakeholders including in person meetings. It is has been NVCA’s experience to formulate a stakeholder committee that oversee background work as it progresses and shall guide the preparation of the Watershed Management Plan. Stakeholder representatives provide input and direction on behalf of their affiliations to ensure that the plan is both comprehensive and “integrated” in meeting the needs of the NVCA and reflects the interests of the identified partners.
- Asset Management: As noted in Section 3.1 of the RFP it is expected that the proposal will outline the completion of a high level ecological lifecycle costs/asset management analysis as part of a larger watershed characterization. Please note that NVCA has already completed a capital asset management plan.
- NVCA staff report from the December 15, 2017 Board of Directors meeting provides additional details on the project scope and budget. This report (item c.2, report No. 77-12-17-BOD, page 37) can be found on our website at:
<https://www.nvca.on.ca/Shared%20Documents/2017%2012%2015%20Agenda.docx.pdf>