



Tay Valley Township

**REQUEST FOR PROPOSALS  
INCLUSIVE COMMUNITIES PROJECT**

RFP'S RECEIVED BY:

The Corporation of Tay Valley Township  
217 Harper Road  
Perth, Ontario K7H 3C6

Attention: Amanda Mabo, Clerk

Telephone: 613-267-5353 ext. 130

Toll Free: 1-800-810-0161

E-mail: [clerk@tayvalleytwp.ca](mailto:clerk@tayvalleytwp.ca)

Website: [www.tayvalleytwp.ca](http://www.tayvalleytwp.ca)

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**PART "A" – INFORMATION TO BIDDERS**

**1. Proposal Timing**

The schedule for the Proposal anticipates the following milestones:

- Last Day for Questions: Friday, April 9<sup>th</sup>, 2021
- Last Day for Addenda: Monday, April 12<sup>th</sup>, 2021
- RFP Submission (Proposals due): Thursday, April 15<sup>th</sup>, 2021 at 1:00 p.m.
- Contract Award Tuesday, April 27<sup>th</sup>, 2021

**2. RFP Closing**

Submissions, sealed in an envelope, clearly marked with the return address label (Form 1, attached), will be received by the undersigned or his/her designated representative, at the Municipal Office, 217 Harper Road, Perth, Ontario, until **1:00 p.m.**, local time, as determined by the clock located on the computer in the reception area of the Municipal Office, on **Thursday, April 15, 2021**.

Submissions received after closing time will not be considered.

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**3. RFP Submission**

One copy of the **completed Declaration**, Appendix A, shall be submitted as part of the Proposal. The Declaration must be properly signed and witnessed, or signed, witnessed and sealed if the bidder is a Corporation. Proposals must be submitted, using the Appendix "D" - RFP Label (to be affixed on your RFP Envelope).

The Proposal must be typewritten. Proposals which are incomplete, conditional or obscure or which contain erasures or alterations not properly initialed, or irregularities of any kind, may be rejected. Submissions must not be restricted by a statement added to the Corporation of Tay Valley Township's ("the Township's") documents or by a covering letter, or by alterations to the documents supplied.

Submissions received by fax or email will not be accepted.

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**4. Proposal Validity**

Proposals shall remain valid and open for acceptance by the Township for a period of sixty (60) calendar days, following the closing date for receipt of Proposals.

**5. Clarification of Documents**

Any clarification of the Township's documents required by the Bidder, prior to submission, shall be directed to the Clerk. Any such clarifications so given shall not, in any way, alter the Township's documents and the Bidder and the Township agree that in no case shall oral arrangements be considered.

No officer, agent or employee of the Township is authorized to alter, orally, any portion of these documents. During the period prior to submissions, alterations will be issued to Bidders as written Addenda. In the submission, the Bidder shall list all Addenda that were issued and considered in the submission.

All questions shall be directed, in writing (by email) to the Clerk.

All questions/discrepancies identified must be sent to the Township at least three (3) business days prior to the submission due date.

Copies of all questions and answers and any addenda will be posted on the website no later than two (2) business days prior to the submission due date.

**6. Contract Documents and Order of Precedence**

The Contract documents shall consist of all the pages of the RFP documents, issued by the Township, and the Bidders submission. Do not remove any pages from the Township's Form.

These documents, and portions thereof, take precedence in the order in which they are named, notwithstanding the chronological order in which they are issued or executed.

The intent of the Contract is that the Company shall supply equipment and materials, or services complete and suitable for the Township' intended use.

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**7. Addenda**

Bidders may be advised of addenda, of required additions, deletions or alternations in the requirements of the Request for Proposal documents. All such changes shall become an integral part of the RFP documents and shall be allowed for in arriving at the total submission price.

**8. Harmonized Sales Tax**

Harmonized Sales Tax (H.S.T.), or any other applicable taxes, will be paid in addition to the total price submission.

The quoted price must clearly show the H.S.T. as a separate item from the total price submission.

**9. Health and Safety**

The Bidder assumes full responsibility for conforming to all legislation regarding the safety of his/her employees and the public on this Contract and all notices required to comply with the legislation.

Accordingly, the Bidder shall:

- a) Provide a copy of your Company's Health and Safety Policy, dated not later than **2021**, to be submitted with the Proposal. Only an electronic copy is required.
- b) **Provide a copy of the applicable WSIB Certificate of Clearance** or equivalent (if the Company is from outside Ontario), ensuring that all employees are fully covered by WSIB and its regulations, to be submitted with the RFP.

**10. Accessibility**

The Bidder shall provide a declaration with their Proposal that they are compliant with the Accessibility for Ontarians with Disabilities Act and its Regulations. An example of a declaration is attached in Appendix "E".

**11. Proposal Checklist**

To assist Bidders with completing a response to this RFP, a RFP Checklist is included in Appendix "C".

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**12. Withdrawal**

A Submission may be withdrawn at any time prior to the closing date and time at the Bidder's discretion. Withdrawal notification must be in written form, signed, and must be submitted to the Clerk. No facsimile, telephone calls or emails will be accepted. After the official closing date and time, all Submissions received shall be irrevocable.

**13. Public Opening**

All submissions will be opened at the Municipal Office, 217 Harper Road, Perth, Ontario, on the same day and time as the closing date.

**14. RFP Results**

Only the names of the Bidders who submitted a proposal will be made available at the RFP Opening. After the RFP Opening, requests may be submitted to The Corporation of Tay Valley Township for the results and only the names of the Bidders, as read out at the RFP Opening, will be given in the reply. A list of Bidders will be posted on Tay Valley Township's website at [www.tayvalleytwp.ca](http://www.tayvalleytwp.ca) within 48 business hours of the RFP opening.

**15. Submission Acceptance**

It shall be the policy of the Township that in any procurement of goods, services, facilities or construction invitations to submit a proposal to the Township, the Township reserves the right to reject an offer to supply goods and/or services or RFP's presented in response to the Township's procurement processes where the Township determines, in its sole and unfettered discretion, that the entity making the offer has performed poorly on any Township contract during the previous five-year period. Township Council may remove a Bidder's name from consideration for a contract under this Policy, for a period of up to five (5) years, on the basis of documented poor performance or non-performance on a Township Contract.

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

The Township reserves the right to award by item, or part thereof, groups of items, or parts thereof or all items of the Submission, and to award Contracts to one or more Bidders submitting identical prices, to accept or reject any Submission in whole or in part, to waive irregularities or omissions. If in so doing, the best interests of the Township will be served, no liability shall accrue to the Township for their decision in this regard.

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**PART "A" – INFORMATION TO BIDDERS**

The acceptance of any Submission is subject to appropriate funding acceptable to the Township.

The lowest, or any RFP, is not necessarily accepted.

The placing in the mail or delivery of a notice of award to the Bidder address, given the Submission, shall constitute notice of acceptance of the Contract.

**16. Insurance**

Commercial General Liability Insurance

The Company shall, at their expense obtain and keep in force during the term of the Contract, Commercial General Liability Insurance satisfactory to the Township. The policy shall be underwritten by an insurer licensed to conduct business in the Province of Ontario and include but not be limited to the following:

- a) Third party Bodily Injury, Personal Injury and Property Damage, to an inclusive limit of not less than \$5,000,000 per occurrence with an aggregate of not less than \$5,000,000.
- b) The Township shall be added as an additional insured with respect to the operations of the Named Insured. This insurance shall be non-contributing and primary to the Township.
- c) Premises, Property & Operations.
- d) The policy shall contain a provision for cross liability and a severability of interest clause.
- e) Non-owned Automobile Coverage for a limit of not less than \$5,000,000 including contractual non-owned coverage.
- f) Products.
- g) Broad Form completed operations.
- h) Contingent Employer's Liability.
- i) Broad Form Property Damage.
- j) Personal Injury and Advertising Injury.
- k) Occurrence Property Damage.
- l) The policy shall contain a provision for contractual liability – oral and written.
- m) Owner's and Contractor's Protective.

Professional Liability Insurance

The Company shall take out and keep in force Professional Liability insurance in the amount of \$2,000,000 providing coverage for acts, errors and omissions arising from their professional services performed under this Agreement. The policy SIR/deductible shall not exceed \$10,000 per claim and if the policy has an aggregate limit, the amount of the aggregate shall be double the required per claim limit. The policy shall be renewed for 3 years after contract termination or contain an extended reporting period.

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**PART "A" – INFORMATION TO BIDDERS**

Automobile Liability Insurance

Automobile liability insurance with respect to owned or leased vehicles used directly or indirectly in the performance of the services covering liability for bodily injury, death and damage to property with a limit of not less than \$2,000,000 inclusive for each and every loss.

Any and all deductibles applicable to the above-noted insurance policies shall be the sole responsibility of the Named Insured, and the Township shall bear no cost towards such deductibles.

The Company is responsible to effect physical damage on their assets/equipment—failure to do so will not impose any liability on the Township.

The Company shall provide the Township with a certificate of insurance evidencing coverage as noted above at least 10 days prior to Contract commencement. Such policies shall not be cancelled, changed or lapsed unless the Insurer notifies the Township in writing at least thirty (30) days prior to the effective date of such cancellation, material change or lapse. The insurance policy will be in a form and with a company licensed to write business in the Province of Ontario and which are, in all respects, acceptable to the Township.

The Township reserves the right to assess exposures and add additional insurance requirements where deemed necessary.

The Company remains responsible for maintaining the required insurance even if the certificates are never exchanged and/or requested.

**17. Indemnification**

The Company acknowledges that he/she is an independent Company and shall, defend, indemnify, protect and save harmless The Corporation of Tay Valley Township, its officers, members of municipal council, its agents and employees from any and against all damages, liabilities, claims, expenses, demands, loss, costs (including legal costs), actions, legal costs, suits or other proceedings by whomsoever made, directly or indirectly arising out of the Contract attributable to bodily injury, sickness, disease or death or to damage to or destruction of tangible property including loss of revenue or incurred expense resulting from disruption of service and caused by any acts or omissions of the Company, its officers, agents, servants, employees, customers, invitees or licensees, or occurring in or on the premises or third party premises as a result of activities of whatsoever nature arising out of the furnishing by the Company, its agents or employees of the materials and/or performing of the services covered by this Contract. This indemnity shall be in addition to and not in lieu of any insurance to be provided by the Supplier in accordance with this Contract, and shall survive this Contract.

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**PART "A" – INFORMATION TO BIDDERS**

**18. Failure to Enter into an Agreement**

In addition to all of the Township's other remedies, if a selected Bidder fails to execute the accepted agreement or satisfy any other applicable conditions within ten (10) days of notice of selection, the Township may, in their sole and absolute discretion and without incurring any liability, approve an extension (*should agreement changes be requested*), or rescind the selection of that Bidder and proceed with the selection of another Bidder.

**19. Assignment**

The Company shall not assign the Contract, or any portion thereof, without the prior consent of the Township.

If the Township agrees to the assignment of the Contract, all Assignment Agreements will be prepared, at the sole cost of the Company, and under no circumstances will the Township be responsible for these costs.

**20. Laws and Regulations**

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

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

**21. Default by Company**

If the Company commits any act of bankruptcy or if a receiver is appointed on account of its insolvency or in respect of any of its property or if the Company makes a general assignment for the benefit of its creditor, then, in any such case, the Township may, without notice, terminate the Contract.

If the Company fails to comply with any request, instruction or order of the Township or fails to pay its accounts or fails to comply with or persistently disregard statutes, regulations, by-laws or directives or relevant authorities relating to the work or fails to perform the work with skill and diligence or assigns or sublets the Contract without the Township written consent or refuses to correct defective work or is otherwise in default in carrying out its part of any of the terms, conditions and obligations of the Contract, then, in any such case, the Township may, upon expiration of ten (10) days from the date of written notice to the Company, terminate the Contract.



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**PART "A" – INFORMATION TO BIDDERS**

Any termination of the Contract by the Township, as aforesaid, shall be without prejudice to any other rights or remedies the Township may have.

If the Township terminates the Contract, they are entitled to:

- Take possession of all of the work in progress and finish the work by whatever means the Township may deem appropriate under the circumstances.
- Withhold any further payments to the Company until its liability to the Township can be ascertained.
- Recover from the Company loss, damage and expense incurred by the Township by reason of the Company's default (which may be deducted from any monies due or becoming due to the Company, any balance to be paid by the Company to the Township).

**22. Contract Cancellation**

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

The Township shall not be liable to the Company for loss of anticipated profit on the cancelled portions of the work.

**23. Responsibility**

The Township shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any Bidder prior to, subsequent to, or by reason of the acceptance or the non-acceptance of an RFP save as provided in the Contract. The Township reserves the right to reject any or all RFP's and to waive formalities as the interest of the Township may require without stating reasons, therefore, and the lowest or any RFP will not necessarily be accepted.

**24. Payments**

The Company shall invoice the Township monthly, for services and materials provided. The Township shall pay said invoice within thirty (30) days of receipt of the invoice.

The Township shall have the right to withhold, any sum otherwise payable to the Company, such amount as may be sufficient to remedy any defect or deficiency in the work, pending correction of the same.

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**PART "A" – INFORMATION TO BIDDERS**

Invoices shall contain a breakdown of names of employees, sub-contractor hours and rates, hours of work, position, and expenses. The Company shall provide a financial report with each invoice which shall include the following headings: budget (billings), fees (previous billings), expenses, total contract billing approved amount and percent complete.

The successful Company will be required to complete the applicable paperwork to facilitate payment via Electronic Funds Transfer (EFT). This paperwork will be provided to the Bidder by the Township after the Contract is awarded.

**25. Disbursements**

All reasonable and proper expenses incurred by the Company shall be reimbursed without any allowance for overhead and/or profit.

The following costs shall not be reimbursed:

- communication expenses including facsimile, local phone and cellular charges
- standard PC or computer aided design and drafting equipment (excludes specialized equipment or software as identified in the Company's proposal)

**26. Municipal Freedom of Information and Protection of Privacy Act**

Any personal information collected by or on behalf of the Township under this Request for Proposal is subject to the *Municipal Freedom of Information and Protection of Privacy Act*. The information provided to the Township may be used to confirm certain information provided in the submissions for this project. The person submitting this Proposal consents to such collection and use of the information. The person submitting this Proposal acknowledges the Proposal is a public document and that the information contained in the Proposal may become public and consents to the release of that information. By responding to this Request for Proposal, respondents waive any challenge to the Township decision in this regard. Any questions regarding the collection, use, or disclosure of the information should be directed to the Clerk.

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**PART "B" – PROJECT INFORMATION**

**1. Project Overview**

Tay Valley Township (“the Township”) is requesting proposals (“the Proposal”) from qualified Consultants (“the Consultant”) to provide community planning and consultation services to implement an Inclusive Communities Project, entitled, **“Implementing Tay Valley Township’s Age-Friendly Community Plan through Co-Housing, Communication and Inclusion: Affordable, Accessible and COVID-19-friendly Actions for Elder Independence in our Rural Community.”**

Specifically, focusing on three priorities in Tay Valley’s Age-Friendly Community Plan (2017), this project will develop a plan for an innovative co-housing initiative; communication mechanisms for reaching seniors; and protocols for increasing social participation, civic participation; and respect and social inclusion.

The co-housing plan will:

- present a template for affordable, accessible, inclusive, COVID-friendly housing options (as requested by many senior residents);
- service a targeted population of small rural communities in Tay Valley including persons with disabilities;
- support diverse populations of older adults in Tay Valley, specifically, Indigenous, immigrant, Francophone, racialized, and 2SLGBTQI+;
- be innovative and designed to respond to the emerging needs of older adults in Tay Valley (more than 49% of our residents are 55 years+);
- address the changing environment resulting from the Global COVID-19 pandemic.

The new communication mechanisms and participation and inclusion protocols will:

- facilitate communication to seniors and from seniors with the municipality, community groups and within hamlets;
- increase participation by seniors in social and civic activities;
- improve physical infrastructure for seniors to enhance mobility.

Communities that will benefit include: the 8 hamlets within the Township: Balderson, Maberly, Fallbrook, Brooke Valley, Glen Tay, DeWitts Corners, Bolingbroke and Stanleyville. Rural communities in Eastern Ontario will also benefit from the models developed as part of this project (e.g. standard Official Plan and Zoning By-Law language to permit rural co-housing; communication mechanisms and participation protocols).

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**PART "B" – PROJECT INFORMATION**

**2. Project Strategy**

The Township's intent with this project is to develop (A) a Co-housing Model, (B) communication mechanisms specific to seniors, and (C) protocols to increase participation by seniors in social and civic activities. All three actions were identified as priorities in implementing Tay Valley's Age-Friendly Community Plan (2017).

The project will:

- create a new advisory group of older adults and persons with disabilities (in-person or virtual);
- conduct a community needs assessment related to:
  - the Co-Housing Model,
  - desired forms of communication and content,
  - and desired avenues for participation in social and civic activities;
- undertake surveys and/or consultations with resident community groups in all geographic regions of the Township;
- adapt the development of the co-housing model to meet the changing needs in shared housing due to the COVID-19 pandemic;
- revise the Zoning By-Law and Official Plan to permit the Co-Housing Model;
- establish a new Project Team and Resource Network on aging which engages:
  - residents of the Township,
  - municipal representatives,
  - and community organizationsto contribute to the development of a Co-Housing Model; communication mechanisms for seniors, and protocols for participation by seniors in civic and social activities;
- produce an innovative Co-Housing Model for the Township that will ease the financial burden of development, reduce the steps involved with zoning, navigate the municipal requirements related to co-housing developments, and offer a Co-Housing Model that will accommodate needs for self-isolation and social distancing in a changing environment due to the COVID-19 pandemic;
- develop communication mechanisms for seniors, and protocols for participation by seniors in civic and social activities.

**3. Background**

The Township is a rural municipality in Lanark County located midway between Ottawa and Kingston and adjacent to the Town of Perth. The year-round population of approximately 5,600 people doubles in the summer as cottagers return to their seasonal residences.

The Township produced an Age-Friendly Community Plan, published in 2017, that identifies priorities for implementation (a document that is available online for review).

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**PART "B" – PROJECT INFORMATION**

A Co-Housing Plan was the top priority for implementation of Tay Valley's Age-Friendly Community Plan (AFC) and will meet the desire expressed by seniors in most of the hamlets of Tay Valley Township for alternative, innovative housing options, and will address changing needs in a Covid-19 environment.

Improving communication with and among seniors was the next highest priority of the AFC Plan and increasing participation in social and civic activities by enhancing mobility and other options was the third priority of the AFC Plan (2017).

The demographics of the Township clearly exhibit a need for a well-functioning AFC as the 2016 census identified Tay Valley's population as heavily skewed to older adults compared to the provincial average (49% of TVT residents were 55+, and 28% were 65+ compared to the provincial average of 30% and 17% respectively). The United Way Profile of Vulnerable Seniors (2018) identified a high proportion of Lanark County seniors as vulnerable due to gender, age, ethnicity, LGBTQ characteristics.

This project will move Tay Valley forward to becoming an Age-Friendly Community.

**4. Nature of Consulting Agreement**

The Township wishes to engage a Consultant with experience in community planning within Ontario for the implementation of priorities identified in the Age-Friendly Community Plan (2017) and the development of a Co-Housing Model. This plan will have a specific focus on the needs and qualities of communities in Tay Valley.

Service provision includes identifying opportunities to include in the Co-Housing Model that will leverage the existing features and networks within the Township in a cost-effective manner.

The Consultant must submit demonstrated ability for the following:

- knowledge, understanding, experience and success in creating community plans within the province of Ontario;
- knowledge and experience with age-friendly principles and accessibility requirements;
- professional, cost-effective practises that maximize the project budget;
- successful project management abilities;
- the resources to meet the timelines of the project;
- exceptional communication skills both written and verbal.

The Consultant shall provide a detailed Co-Housing Model, and, during the process of developing the plan, identify possibilities for the community based on its location and attributes, best practises and the successes of similar communities. The firm will consult with stakeholders, staff and community groups in order to achieve satisfaction

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**PART "B" – PROJECT INFORMATION**

with both the implementation of the Age-Friendly Plan, and in the development of a Co-Housing Model, will consider the financial obligations that will impact the Township.

**5. Project Principles**

The project will reflect the principles outlined in the Age-Friendly Community Plan (2017), entitled, “**Creating Rural Foundations for Elder Independence in Tay Valley Township: Age-Friendly Community Planning.**” The proposal will clearly identify the process and steps to best achieve the objectives, deliverables and principles identified herein.

- the project will align with the principles outlined in the Township’s Age-Friendly Community Plan (2017);
- the project will involve consultation with members of Council and staff;
- the project will involve consultation with members of the community including persons with disabilities and diverse populations of older adults in Tay Valley, specifically, Indigenous, immigrant, Francophone, racialized, and 2SLGBTQI+.

**6. Project Objectives**

The main objective of this project is to implement three aspects of the Township's Age-Friendly Community Plan (2017). The successful consultant retained will develop:

- an innovative local action plan for affordable, accessible, inclusive housing options, specifically a Co-Housing Model for the Township
- communication mechanisms for seniors, and,
- protocols for participation by seniors in civic and social activities will be developed.

Project objectives are to develop a Co-Housing Model that:

- responds to the demand from Tay Valley residents for co-housing opportunities;
- presents an innovative model for facilitating affordable and accessible co-housing;
- services a targeted population of small rural communities in Tay Valley;
- supports diverse populations of older adults, specifically: Indigenous, immigrant, Francophone, racialized, and 2SLGBTQI+;
- supports persons with disabilities; and
- addresses the changing environment resulting from the global COVID-19 pandemic.

In addition, project objectives include:

- developing communication mechanisms for seniors, and
- protocols for participation by seniors in civic and social activities.

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**PART "B" – PROJECT INFORMATION**

**7. Project Methodology**

The Consultant shall submit a proposed methodology to achieve the project objectives set out above, which should incorporate the elements and timelines described below, in order to deliver measurable outcomes.

The selected firm shall furnish all expertise, labor and resources to provide complete services necessary for the project during the Contract Term. All shall be completed in accordance with the requirements of the Accessibility for Ontarians with Disabilities Act, the Township's Age-Friendly Community Plan, and other applicable by-laws. The following generally summarizes the types of services that the firm may be required to perform.

The Consultant may be required to complete any or all of the following:

1. Interview key stakeholders, including members of Council and staff, to obtain comments and observations about plans, gather feedback regarding the preliminary concept for the project and discuss potential recommendations for the new plan.
2. Meet with Township Staff at the site(s) of example communities in Tay Valley to review any existing amenities or site constraints and receive direction regarding site specific requirements that may impact the Co-Housing Model.
3. As it relates to the Co-Housing Model, inventory community attributes (specifically the 8 hamlets within Tay Valley Township: Balderson, Maberly, Fallbrook, Brooke Valley, Glen Tay, DeWitts Corners, Bolingbroke and Stanleyville), review pertinent surveys and zoning details, as well as current policy.
4. Prepare concept renderings, to scale, that support the Co-Housing Model.
5. Outline initial concept and develop:
  - (a) Presentations to facilitate stakeholder feedback, meetings with staff and community consultations;
  - (b) Draft co-housing recommendations for stakeholder, staff and community feedback;
  - (c) Develop and conduct a survey to facilitate community consultations and the documentation of community feedback.

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**PART "B" – PROJECT INFORMATION**

6. Collect, consolidate and report on community consultation results; document feedback received, identify key issues, trends / patterns and other findings; Prepare a report that includes an inventory of all comments received and responses to the questionnaire for the purpose of record keeping by the Township; present pertinent information to employees and stakeholders.
7. Draft a Co-Housing Model with recommendations on how to achieve best results in a cost-effective manner; present the draft Plan for discussion with key stakeholders and staff.
8. In consideration of stakeholder and staff feedback on the draft Plan, revise the concept rendering and develop the revised Co-Housing Model.
9. Two (2) Public Presentations - The successful firm will provide a person or persons with experience and/or training in facilitating public meetings for the presentation of:
  - a) revised draft Co-Housing Model to Tay Valley Senior Management and Council; and
  - b) revised draft Co-Housing Model to the Township at a Public Meeting for approval.
10. Make required modifications as necessary to finalize the Co-Housing Model based on feedback to date.
11. Prepare final renderings to scale.
12. Other types of professional services of a nature consistent with the intent of the RFP.

**8. Impacts of the Project**

Anticipated impacts of the project are as follows:

- number of people benefited (population of approx. 5600 permanent residents in the Township 49% over 55, 28% over 65);
- 8 small, rural communities (referring to the 8 hamlets within the Township: Balderson, Maberly, Fallbrook, Brooke Valley, Glen Tay, DeWitts Corners, Bolingbroke and Stanleyville) and surrounding rural landowners will have improved their options with regard to affordable, accessible, inclusive, COVID-19-friendly co-housing;
- Zoning By-Law and Official Plan changes and planning process changes;
- new communication mechanisms for increased participation by seniors.



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**PART "B" – PROJECT INFORMATION**

Measurable Impacts include:

- number of Volunteers,
- number of people on the Project Team,
- number of people in the Resource Network,
- number of participants in the community consultations,
- number of hamlets involved,
- number of new communication mechanisms implemented,
- number of traditionally unserved populations of older adults (rural), including those with disabilities that increase their participation in the community and civic life (e.g., by subscribing the Township newsfeed, etc.)

**9. Deliverables**

The Consultant shall deliver on the following responsibilities:

- Develop an innovative local action plan for affordable, accessible, inclusive housing options, specifically a Co-Housing Model for Tay Valley Township;
- Develop communication mechanisms for seniors; and
- Develop protocols for participation by seniors in civic and social activities.
  
- To provide a project brief that includes:
  - confirmation of Township needs
  - community consultation plan
  - workplan that aligns with the Township's timelines as detailed in the Project Methodology section of this RFP document
  - project budget
  
- Create a new advisory group of older adults and persons with disabilities (in-person or virtual);
  
- Conduct a community needs assessment related to:
  - the Co-Housing Model,
  - desired forms of communication and content,
  - and desired avenues for participation in social and civic activities;
  
- Prepare outreach materials and advertising, communication documents and mechanisms, participation protocols;
  
- Acquire and utilize communication devices needed for virtual forums and in-person meetings to enable full participation by older adults and people with disabilities (e.g. tablet) during the COVID-19 pandemic and beyond to overcome mobility challenges;

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**PART "B" – PROJECT INFORMATION**

- Undertake surveys and/or consultations with resident community groups in all geographic regions of Tay Valley Township (specifically the 8 hamlets within Tay Valley Township: Balderson, Maberly, Fallbrook, Brooke Valley, Glen Tay, DeWitts Corners, Bolingbroke and Stanleyville);
- To prepare and present a Co-Housing Model concept in accordance with the principles outlined in the Age-Friendly Community Plan (2017);
- Development a draft Co-Housing Model to meet the changing needs in shared housing due to the COVID-19 pandemic;
- To identify potential options for the Co-Housing Model in alignment with the needs and wants of the community, within the municipality's financial capacity; AND to provide a rationale for these options;
- Draft a revision the Township's Zoning By-Law and Official Plan to permit the Co-Housing Model;
- Establish a new Project Team and Resource Network on aging which engages:
  - residents of Tay Valley,
  - municipal representatives,
  - and community organizationsto contribute to the development of a Co-Housing Model; communication mechanisms for seniors, and protocols for participation by seniors in civic and social activities;
- To clearly report how the project activities are in accordance with the Age-Friendly Community Plan, (citing page numbers); AND in compliance with the regulations prescribed by the Accessibility for Ontarians with Disabilities Act;
- Produce an innovative Co-Housing Model for Tay Valley Township that will ease the financial burden of development, reduce the steps involved with zoning, navigate the municipal requirements related to co-housing developments, and offer a co-housing model that will accommodate needs for self-isolation and social distancing in a changing environment due to the COVID-19 pandemic;
- Develop communication mechanisms for seniors, and protocols for participation by seniors in civic and social activities;
- To employ best practices similar projects;
- To determine the most cost-effective way to for the Co-Housing Model to meet current and future needs;

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**PART "B" – PROJECT INFORMATION**

- To complete and present a final Co-Housing Model in accordance with the principles outlined in the Age-Friendly Community Plan (2017); in compliance with the regulations prescribed by the Accessibility for Ontarians with Disabilities Act; in compliance with Township Planning By-Laws; and demonstrating consideration of feedback provided through consultations;
- The Consultant shall complete the Co-Housing Model by an agreed upon completion date:
- The Consultant shall present the Co-Housing Model at a meeting of Council;
- The Consultant shall provide assistance to staff in communicating the project to stakeholders at key intervals throughout the duration of the project;
- Finally, the Consultant shall provide the following documents at the conclusion of the project to the Township in both hardcopy and electronic format; project brief, presentation material, community consultation results and the final Co-Housing Model including appendices and attachments.

**10. Location Map**

Schedule "A" is a location map of the Township.  
Schedule "B" is a ward map of the Township.

**11. Proposal**

Proponents are required to submit three (3) copies of their proposal in hard copy and one electronic copy in .pdf format, on a secure USB stick.

The proposal shall include:

- (a) an overview of the proposed methodology;
- (b) names of the key personnel to be assigned with resumes outlining qualifications and experience;
- (c) relevant experience of key personnel and the firm in completing successful community plans;
- (d) names and contact information for a minimum of three (3) references who can attest to the Consultant's performance on similar assignments;
- (e) project schedule with relevant milestone dates identified; and,
- (f) project costing which shall include an upset limit (fees and disbursements) including the hourly rates for the assigned staff.

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**PART "B" – PROJECT INFORMATION**

**12. Target Completion Dates**

The Consultant's proposed schedule shall reflect the anticipated start and completion dates assuming a contract award date of April 27<sup>th</sup>, 2021.

<b>Workplan Activity/Description</b>	<b>Activity Start Date</b>	<b>Activity Completion Date</b>
Preliminary work with successful Project Manager	April 29, 2021	May 14, 2021
Project announcement, recognition to funder	May 6, 2021	May 6, 2021
Volunteer Recruitment and Training	May 6, 2021	May 31, 2021
Event organization (Launch)	May 31, 2021	June 4, 2021
Promotion of opportunities for participation	May 31, 2021	June 30, 2021
Community consultations	June 14, 2021	July 30, 2021
Data from community consultations compiled	Sept 1, 2021	Sept 15, 2021
Project Team to evaluate status of Project Activities, draft a list of inclusions for the Co-Housing Model based on data collected	Sept 16, 2021	Sept 30, 2021
Prepare Report	Oct 1, 2021	Oct 29, 2021
Volunteer Appreciation	Oct 1, 2021	Oct 29, 2021
Receive feedback from Project Team and Resource Network on Interim Report	Nov 1, 2021	Nov 27, 2021
Draft Co-Housing Model, Communication Mechanisms, Participation Protocols for review by Participants	Jan 10, 2022	Jan 31, 2022
Final Model, Mechanisms Adopted by Council	Feb 1, 2022	Feb 28, 2022

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**PART "B" – PROJECT INFORMATION**

<b>Workplan Activity/Description</b>	<b>Activity Start Date</b>	<b>Activity Completion Date</b>
Release report	Mar 1, 2022	Mar 31, 2022
Funding Deadline	Mar 31, 2022	Mar 31, 2022
Final Report	Apr 1, 2022	Jun 30, 2022

**13. Project Management**

The Consultant is expected to actively manage the project and is responsible to ensure the project is completed in accordance with the Agreement in a timely manner and within budget. A summary of the activities to be undertaken in this task is, but not limited to, the following:

- Coordinating the work of the Consultant and any Sub-Contractor;
- Provide regular and as-requested updates to the Township on the status of the project;
- Prepare and present the Co-Housing Model to Council; and,
- Prepare and submit invoices and progress reports at milestone stages of the project to the Township's satisfaction.

**14. Project Reporting**

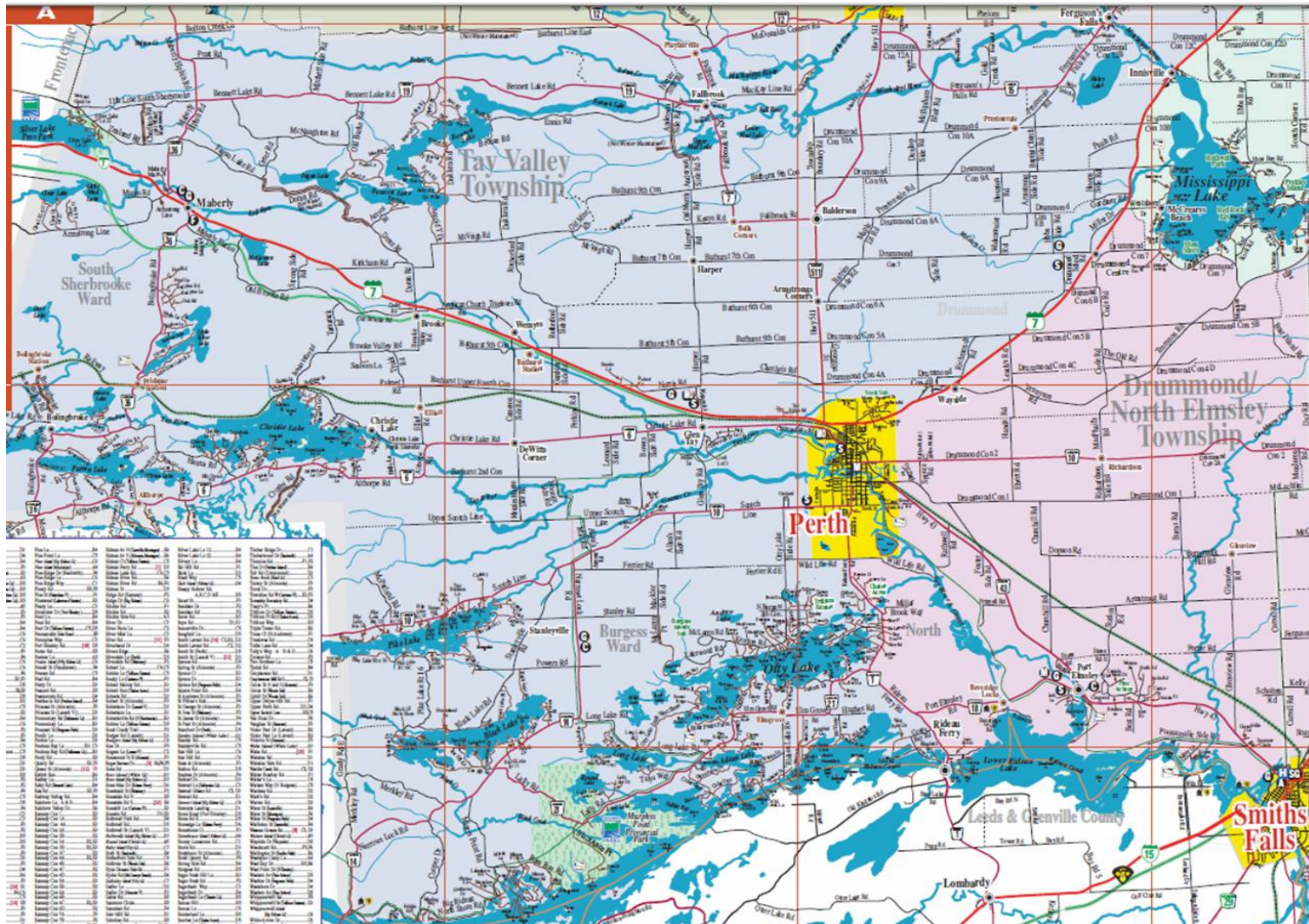
Noelle Reeve, Planner, will be the key contact person for this project:

Mailing Address: 217 Harper Road  
Perth, Ontario K7H 3C6  
Telephone: (613) 267-5353 ext. 128  
Email: [planner@tayvalleytwp.ca](mailto:planner@tayvalleytwp.ca)

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PART "B" – PROJECT INFORMATION

SCHEDULE "A"



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PART "B" – PROJECT INFORMATION

SCHEDULE "B"



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**PART "C" – PROPOSAL EVALUATION**

**1. Submission Instructions**

This RFP is to be divided into two components - Proposal and Financial.

The Bidder shall submit, in one sealed package, three (3) hard copies of each component in separate documents. The submissions shall also include one electronic copy, in PDF format, of both components saved as separate files.

Bidders are required to prepare their submission as follows:

**Component 1 – Proposal**

Shall be a response to Part “B” – Project Information including any appendices, a cover letter and a table of contents. The Proposal shall not exceed eight (8) single-sided letter size pages in a minimum 12-point font including spreadsheets, which can be submitted in 11 x 17 format and shall count as one (1) page. Appendices such as detailed résumés and level of effort tables (excluding prices) may also be included and do not count towards the maximum number of pages. Component 1 shall also include the following as appendices:

1. Appendix “A” – Declaration
2. Appendix “C” – Bidders Checklist
3. Appendix “E” – Accessibility Declaration
4. Health and Safety Policy – 2021
5. WSIB Clearance

**Component 2 - Financial**

Shall be the Bidder’s financial offer and should correspond with the Bidder’s proposed schedule and each phase of the project. This section shall provide a breakdown of costs for each phase and contain the following:

1. Appendix “B” – Financial Offer

It is requested that pricing information not be included within Component 1 of the submission.

**2. Evaluation and Selection Methodology**

Proposals will be evaluated in accordance with the steps identified below. Bidders are required to address each requirement in sufficient depth in their submission to permit a full evaluation of their Proposal. The onus is on the Bidder to demonstrate that it meets the requirements specified in this RFP.



**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**PART "C" – PROPOSAL EVALUATION**

The Township will evaluate the submission solely on the documentation provided as part of the Proposal. References in the submission to additional information not submitted as part of the Proposal, such as a website address where additional information can be found, will not be considered in the evaluation of the Proposal.

Assessment of the Proposal submissions will commence after the RFP closing date.

**3. Conduct of Evaluation**

In conducting its evaluation of Proposals, the Township may, but will not be obligated to do the following:

- Seek clarification or verification from the Bidder regarding any or all information provided by them with respect to this RFP;
- Contact any or all references supplied by the Bidder to verify and validate any information provided by them;
- Request specific information with respect to the Bidder's legal status;
- Conduct a survey of the Bidder's financial capabilities to determine if they are adequate to meet the requirements of this RFP.

Bidders will be given a specific number of days by the Township to comply with any request related to any of the above items. Failure to comply with the request may result in the Proposal being declared non-responsive.

**4. Evaluation Team and Process**

An evaluation team comprised of Township officials will review all Proposals received and score the Proposals using a consensus approach in relation to the requirements and points that are identified herein. The Township reserves the right to engage professional external or subject matter experts to assist with the evaluation process.

By submitting a Proposal, the Bidder agrees to be bound by the process set out in this RFP regarding the evaluation of Proposals.

Step	Evaluation Stage Description	Weighting
1	Evaluation against Rated Requirements	70
2	Evaluation of Financial Offers	30
	Total Points Available	100

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**PART "C" – PROPOSAL EVALUATION**

The following must be provided in the Proposal for Consideration:

Project Schedule	Pass/Fail
Completed Declaration (Appendix "A")	Pass/Fail
Health and Safety Policy (Part "A" - #9)	Pass/Fail
WSIB Certificate of Clearance (Part "A" - # 9)	Pass/Fail
Accessibility Declaration (Part "A" - # 10)	Pass/Fail
Financial Appendix "B"	Pass/Fail

**Step 1 – Evaluation Against Rated Requirements (70 points)**

Proposals will be evaluated and scored in accordance with the rated requirements of this RFP and the following Scoring Guide:

Detailed Work Plan Evaluation	Point Allocation
Firm's Qualifications and Experience on Similar Assignments	5
Project Team's Experience	10
Project Understanding	10
Work Plan, Methodology and Quality Assurance Plan	35
Project Schedule	10
<b>TOTAL:</b>	<b>70</b>

Bidders are required to achieve a minimum of 49.0 (70%) on the overall rated requirements. Failure to achieve the minimum score will render a Proposal non-responsive and will be given no further consideration.

**Step 2 – Evaluation of Financial Proposals (30 points)**

Only Proposals meeting all the requirements detailed in Step 1 will be considered at this point.

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**PART "C" – PROPOSAL EVALUATION**

Proposals will be evaluated for the "Proposal Fee" portion based on the following:

The lowest fee proposed shall be awarded the full amount of points available for the fee portion of the evaluation (30). All higher fees proposed shall be awarded points, rounded to the closest full point for the portion of the evaluation by the following:

$$\text{Awarded Price Points} = \left( \frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)}$$

For example: if the low fee is \$100,000, 2nd low fee is \$120,000 and 3rd low fee is \$200,000 their respective scoring would be as follows:

- a) The Bidder with the low fee of \$100,000 would be awarded 30 Points.
- b) The Bidder with the 2nd low fee of \$120,000 would be awarded points as follows:

$$\begin{aligned} \text{Awarded Price Points} &= \left( \frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)} \\ &= \left( \frac{\$100,000}{\$120,000} \right) \times 30 \\ &= 25 \end{aligned}$$

- c) The Bidder with the 3rd low fee of \$200,000 would be awarded points as follows:

$$\begin{aligned} \text{Awarded Price Points} &= \left( \frac{\text{Lowest Proposal}}{\text{Evaluated Proposal}} \right) \times \text{MAX POINTS (30)} \\ &= \left( \frac{\$100,000}{\$200,000} \right) \times 30 \\ &= 15 \end{aligned}$$

- d) This formula would be applied to the balance of proposals received.

**Step 3 – Due Diligence**

The Township, at its sole discretion, may conduct a due diligence phase to review the certainty, reasonableness and comprehensiveness of a Proposal. The Township may seek clarification of any of the elements contained in the Proposal and contact the project references in order to confirm the information provided. Bidders are expected to cooperate in providing clarification on any of the components of their Proposal. Proposals that fail to satisfy the due diligence phase shall not be given any further consideration.

Bidders may be required, and shall diligently do so if requested by the Township, to furnish supplemental information concerning their Proposals. Generally, diligently shall mean within 48 hours of such notice given by the Township.

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**PART "C" – PROPOSAL EVALUATION**

**Step 4 – Selection of Successful Bidder**

The evaluation team intends to recommend Proposals for authorization on the basis of “best value” to the Township, as determined by Proposals having met and passed all the preceding steps, meaning:

- achieves an overall evaluation score which meets or exceeds the Rated Requirements threshold, as outlined in Step 1;
- have passed the Financial Offer evaluation, as outlined in Step 2;
- scored the highest awarded points after adding the points awarded in Step 1 to the points awarded in Step 2 and,
- have passed the Due Diligence evaluation, as outlined in Step 3.

**Step 5 – Award**

Following the selection of a Successful Company, authorization of the Contract will be made in accordance with the provisions of the Township’s Procurement Policy.

**Step 6 – Debriefing**

Bidders are entitled to request a debriefing from the Township of how their submission was evaluated. Debriefing sessions will be scheduled by the Project Manager following Step 5 of the evaluation process. Debriefing sessions shall be conducted for the sole purpose of providing constructive and instructive feedback to a Bidder. A debriefing session will only involve a review of how the Township considered and evaluated a particular Bidder’s Proposal and will not include disclosure of any aspects of the Township evaluation of other Proposals received from other Bidders.

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
REQUEST FOR PROPOSAL  
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**APPENDIX "A" – DECLARATION**

1. I, \_\_\_\_\_, of \_\_\_\_\_,  
**DECLARE** that no person, firm or Corporation, other than the one whose signature or the signature of whose proper officers and seal is or are attached below, has any interest in this submission or in the Contract proposed to be taken.
2. **I FURTHER DECLARE** that this Proposal is made without any connections, knowledge, comparison of figures or arrangement with any other company, firm or person making a submission for the same project and is in all respects fair and without collusion or fraud.
3. **I FURTHER DECLARE** that no member of the Township Council, or any Officer of The Corporation of Tay Valley Township is or will become interested, directly or indirectly, as a contracting party or otherwise, in the performance of the Contract, or in the supplies, work or business to which it relates or any portion of the profits thereof, or any such supplies to be used therein or in any of the monies to be derived therefrom.
4. **I FURTHER DECLARE** that several matters stated in the said Proposal are in all respects true.
5. **I FURTHER DECLARE** that I have carefully examined the Request for Proposal document, and hereby acknowledge the same to be part and parcel of any contract to be let for the project therein described or defined and do all the work and to provide the services for the prices stated.
6. **I FURTHER DECLARE** that I have a clear understanding of all the work involved in this contract.
7. **I FURTHER DECLARE** that this offer is to continue open to acceptance until the formal contract is executed by the successful Company for the said project OR for a period of sixty (60) days after the closing date, whichever first occurs and that the Township may, at any time, within that period, without notice, accept this Submission whether any other Submission has been previously accepted.
8. **I FURTHER DECLARE** that the awarding of the contract based on this Request for Proposal by the Township shall be an acceptance of this Proposal.
9. **I FURTHER DECLARE** that in the event of default or failure on our part, that the Township shall be at liberty to advertise for new Requests for Proposals, or to carry out the works in any other way they deem best, and I also agree to pay to the said Township the difference between this Request for Proposal and any greater sum which the said Township may expend or incur by reason of such default or failure or by reason of such action as aforesaid, on their part, including the cost of any advertisement for new Request for Proposals; and to indemnify and save harmless the said Township and their officers from all loss, damage, cost charges and expenses which they may suffer or be put to by reason of any such default or failure on our part.
10. **I FURTHER DECLARE** that Addendum/Addenda No. \_\_\_\_\_, inclusive, has/have been received, and that all changes specified in the Addendum/Addenda have been included in the prices submitted.

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
E-mail Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
Name of Signing Authority for  
Contract (Please print)

\_\_\_\_\_  
Telephone

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
REQUEST FOR PROPOSAL  
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**APPENDIX “B” – FINANCIAL**

The Bidder offers to provide the services noted within this Proposal package and identified tasks, and as further detailed in the Company’s proposal, to the acceptance of the Township for the following Upset Cost Limit.

Professional Fees	Disbursements	Total Cost (excluding HST)
\$ _____	\$ _____	\$ _____
<b>TOTAL PROPOSAL PRICE</b>		<b>\$ _____</b>

In addition to this summary, the Bidder is required to provide a detailed price breakdown by major tasks with the Proposal. The breakdown should include the specific activities planned, the timing and associated level of effort by individual or classifications.

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**APPENDIX “C” – BIDDERS CHECKLIST**

To be submitted as part of the RFP.

1. Completed Declaration (Appendix “A”)
2. 2021 Health and Safety Policy – Part “A” (#9)
3. WSIB Certificate of Clearance – Part “A” (#9)
4. Accessibility Declaration – Part “A”/Appendix “E” (#10)

To be submitted upon Contract award.

1. Insurance Requirements – Part “A” (#16)

**THE CORPORATION OF TAY VALLEY TOWNSHIP  
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**APPENDIX “D” – RFP LABEL**

To help identify your RFP, please cut out the label below and affix this label to the outside of your RFP Envelope:

<b>THE CORPORATION OF TAY VALLEY TOWNSHIP REQUEST FOR PROPOSAL INCLUSIVE COMMUNITIES PROJECT</b>	
The Corporation of Tay Valley Township 217 Harper Road, Perth, Ontario K7H 3C6	
<b>Attention:</b>	<b>Amanda Mabo, Clerk</b>
Telephone:	613-267-5353 ext. 130
Toll Free:	1-800-810-0161
E-mail:	<a href="mailto:clerk@tayvalleytwp.ca">clerk@tayvalleytwp.ca</a>
<b>CONTRACT NUMBER:</b>	<b>CLOSING TIME/DATE:</b>
Inclusive Communities Project	1:00 PM April 15 <sup>th</sup> , 2021
<b>YOUR COMPANY’S NAME AND ADDRESS:</b>	



Use the above label for your envelope when you submit your RFP Document.



THE CORPORATION OF TAY VALLEY TOWNSHIP  
REQUEST FOR PROPOSAL

APPENDIX "E"

[COMPANY LETTERHEAD]

To: The Corporation of Tay Valley Township

From: [Company Name]

[DATE]

[CONTRACT NUMBER, CONTRACT TITLE]

Re: Declaration of Compliance – Accessibility of Ontarians with Disabilities Act (AODA)

Please accept this letter as confirmation [COMPANY NAME] is in compliance with the Accessibility of Ontarians with Disabilities Act and its regulations.

[SIGNATURE]

[NAME]

[POSITION]

[CONTACT INFORMATION]

[COMPANY]