



**City of Kingston  
Report to Council  
Report Number 18-074**

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**To:** Mayor and Members of Council  
**From:** Lanie Hurdle, Commissioner, Community Services  
**Resource Staff:** Paige Agnew, Director, Planning, Building & Licensing Services  
**Date of Meeting:** March 20, 2018  
**Subject:** Award of Contract – Population, Housing and Employment Projections Study

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**Executive Summary:**

The purpose of this report is to seek Council approval to award the contract to undertake the Population, Housing and Employment Projections Study pursuant to Request for Proposal (RFP) F31-CS-PD-2017-3.

The RFP was issued on November 28, 2017 seeking the provision of professional services from qualified consultant firms to complete the Population, Housing and Employment Projections Study. The RFP closed on December 20, 2017 with a total of 2 proposals received. A City review team evaluated the proposals based upon criteria established and specifically documented within the RFP. The review team concluded that the proposal provided by Watson & Associates Economists Ltd., which was not the lowest bidder for the work, ranked first in scoring, and offered the most comprehensive submission in response to the RFP and the best value for the City of Kingston to complete the study.

The City did not receive a minimum of three proposals in response to the RFP and staff are not recommending the lowest bid for this project; therefore, Council approval is required to proceed with the recommended proposal as per the City's Purchasing By-Law Number 2000-134.

**Recommendation:**

**That** Watson & Associates Economists Ltd. be awarded the contract for the Population, Housing and Employment Projections Study, RFP Number F31-CS-PD-2017-3, for a total price of \$88,000.00 plus applicable taxes; and

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**That** the Mayor and Clerk to enter into an agreement with Watson & Associates Economists Ltd. in a form satisfactory to the Director of Legal Services.



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**Options/Discussion:****Background**

Population, housing, and employment projections provide the foundation for the City's long-range land use, transportation, infrastructure and capital expenditure planning. The projections are reflected in the City's Official Plan and have been used to inform other strategic planning documents such as the Water and Wastewater Master Plan, the Kingston Transportation Master Plan, the Active Transportation Master Plan, the Employment Land Strategy Review, the Commercial Land Review and the Kingston Transit Five (5) Year Business Plan 2017-2021.

The projections are completed every five years in order to update the existing projections with new Statistics Canada Census data and to extend the planning horizon. The most recent Population, Housing and Employment Projections Study was completed in 2013 for the Kingston CMA and City of Kingston. The study identified low, medium (base) and high case projections over a period of thirty (30) years (i.e. to 2041 using 2011 Census data).

The 2018 study is particularly significant as the population data released in the 2016 Census has brought about questions regarding the reliability of the 2013 study projections largely due to discrepancies in anticipated versus reported population numbers. Specifically, the base case in the 2013 projection study provided that the 2016 population for the City of Kingston would be 129,870 persons, being 6,460 persons (5.2%) greater than the 2011 population documented in the study. The reported 2016 Census population for the City of Kingston was 123,798, being 435 persons (0.35%) greater than the 2011 Census population. The projections made in 2013 were substantially higher than that experienced in the City as reported by Statistics Canada's Census. As a result, this iteration of projections for the City of Kingston and Kingston CMA requires a thorough analysis as to why the 2011 Census population data is at such odds with the 2016 Census data. This analysis is noted as a deliverable in the work sought by the City.

Through consultation with various City departments, it was determined that there would be added value to further disaggregate growth scenarios by identified sub areas, including at the neighbourhood level and by water and wastewater service areas. In addition, this study is intended to utilize multiple sources of data to provide an analysis of estimated student population change and its impact on future housing demand. A component of the study also includes an analysis of the City's rental market, which will identify trends, future change and supply requirements in the market, both primary (i.e. apartment rentals) and secondary (i.e. private dwelling rentals). Evaluating employment trends and providing insight into key employment sectors is also to be addressed in the study. The Terms of Reference prepared to guide the study is attached as Exhibit A.

The RFP was issued on November 28, 2017 seeking professional services from qualified proponents with expertise in economics, land use planning and development, population projection modeling and forecasting, as well as community engagement and public consultation to complete the Population, Housing and Employment Projections Study. The RFP closed on December 20, 2017 with a total of two (2) proposals received from the following consulting teams:

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1. Watson & Associates Economists Ltd.
2. Hemson Consulting Ltd.

### Evaluation of Proposals & Selection of Consultant

The City review team consisted of staff members from Planning, Building & Licensing Services, Housing & Social Services, Utilities Kingston and Engineering Services. A staff representative from Kingston Economic Development Corporation also assisted in the evaluation process. The evaluation proposal, which was outlined in detail in the RFP document, included the following evaluation criteria and points:

Evaluation Criteria	Weighting
Pricing and Related Costs	30%
Company Profile and Experience and Qualifications of the Project Team	30%
Proposed Work Plan and Quality of Approach and Submission	30%
Understanding of Objectives	5%
Accessibility	5%

As per the details in the RFP, evaluation points for the purchase price were awarded using a pro-rated methodology whereby the lowest price submission received the maximum available points (30).

The evaluation of the proposals by the City review team has concluded that the proposal by Watson & Associates Economists Ltd. provides the most comprehensive submission in response to the RFP, and also represents the best value for undertaking the Population, Housing and Employment Projections Study. The table below summarizes the evaluation information related to rank, price and number of project hours for each of the two (2) proposals:

Rank	Consultant	Price (excludes HST)	Total Hours
1	Watson & Associates Economists Ltd.	\$88,000.00	482
2	Hemson Consulting Ltd.	\$75,225.00	368

Watson & Associates Ltd. is a land economic firm located in Mississauga and the consultant team will be led by Jamie Cook, Director. The curriculum vitae of the project lead, has been included in Exhibit B.

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The work plan proposed by Watson & Associates Ltd. includes the following nine (9) components:

1. Study Start-up and Review of Background Materials;
2. Review of Planning Policy Context;
3. Macro-Economic/Demographic Outlook, Local Development Trends and Review of Growth Drivers;
4. Kingston CMA Population Projections, 2016 to 2046 (including forecast by tenure);
5. City of Kingston Population and Housing Projections, 2016 to 2046;
6. City-wide Employment Forecast, 2016 to 2046;
7. Allocation of Preferred Population, Housing and Employment Projections by Neighbourhood and Sub-Geographic Area;
8. Student Population Forecast; and
9. Conclusions/Recommendations.

The scope of work includes providing an analysis on the City's rental market and student population, and commentary on the discrepancies found between the 2013 projection study and the 2016 Census. In addition, through consultation with various City departments, it was determined that there would be value added to further disaggregate growth scenarios by identified geographic sub areas to assist with long-range planning. The proposal will deliver growth scenarios on the basis of these sub areas and may provide to the City a model which will enable additional projections to be run as new data becomes available.

In addition, staff requested a response from Watson & Associates Economists Ltd. in regards to a few clarification questions following the formal evaluation process. Watson & Associates Economists Ltd. provided a response on February 8, 2018 that confirmed work plan timelines and that the proposed methodology will capture preliminary and secondary rental supply markets as well as various employment sub categories. Staff also received additional information to more fully comprehend the potential use of a growth projection model that would allow staff to make any required in-house changes based on updated data. The potential for the creation of a growth projection model will be further discussed once the study commences.

The Community Engagement Strategy includes two Public Meetings and the utilization of a number of tools to raise awareness on the project including e-mail lists, newspaper ads and social media. Social media vehicles being proposed include Twitter, Facebook and Blogs. Public Meeting strategies include the use of display boards, one-on-one discussions, group presentations and breakout sessions. Additional methods to engage the community include stakeholder interviews and an online project questionnaire. Consultation is also proposed to be held with key local rental-unit providers to obtain local data and perspective to help inform the baseline analysis and forecast of rental inventory.

Based on the formal evaluation process, staff recommends the award of the contract for the Population, Housing and Employment Projections Study to the consulting team from Watson & Associates Economists Ltd. The City review team evaluated the proposals based upon the criteria established and specifically documented within the RFP. The review team has

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concluded that the proposal provided by Watson & Associates Economists Ltd. meets the criteria established in the RFP and is appropriately priced.

The Watson & Associates Economists Ltd. submission has demonstrated a detailed methodology to undertake the projection work to the satisfaction of the review team. The submission provides a thorough understanding of contextual factors that may have an impact on population, housing and employment numbers and demonstrates the ability of the consulting team to address all of the objectives outlined in the RFP. The work plan contains a thorough public consultation strategy, which will provide several opportunities for the public and stakeholders to provide input throughout the project.

**Next Steps**

The Population, Housing and Employment Projections Study will begin once the consultant selection has been finalized and the contract executed.

**Existing Policy/By-Law:**

By-Law Number 2000-134 - A By-law to Establish Purchasing Policies and Procedures

**Notice Provisions:**

Not applicable

**Accessibility Considerations:**

Not applicable

**Financial Considerations:**

There are sufficient funds allocated in capital accounts within the Planning, Building & Licensing Services Department to cover the costs of services sought by Watson & Associates Economists Ltd.

**Contacts:**

Paige Agnew, Director, Planning, Building & Licensing Services 613-546-4291 extension 3252

Greg Newman, Manager, Policy Planning 613-546-4291 extension 3289

Andrea Furniss, Senior Planner 613-546-4291 extension 3219

**Other City of Kingston Staff Consulted:**

Not applicable

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**Exhibits Attached:**

Exhibit A Population, Housing and Employment Projections Study – Terms of Reference

Exhibit B Curriculum Vitae for Jamie Cook

# Population, Housing and Employment Projections Study

## Terms of Reference

### 1. Introduction

The City of Kingston, Community Services Group, Planning, Building and Licensing Services is requesting proposals from qualified consultants to undertake a Population, Housing and Employment Projections Study. A key component of the review process is to update the existing population, housing and employment projections completed in 2013 using Statistics Canada's 2016 Census data.

The following sections are intended to guide the preparation of proposals for the Population, Housing and Employment Projection Study for the City of Kingston.

### 2. Background of the Project

#### 2.1 Study Area

The geographic area to be captured by this Study is limited to the Kingston Census Metropolitan Area (CMA) and the City of Kingston (Census subdivision). It is anticipated that the Study will; however, offer insights into population, employment and housing trends that may be occurring within a broader (regional) context. Furthermore, the projections sought are expected to identify trends within sub areas of the City, including the City's defined forty-eight (48) neighbourhoods and for additional identified sub areas that cross multiple neighbourhoods. These specific geographic sub areas of the City include Kingston East, Kingston West, Kingston Central, Kingston North, the urban serviced area and rural area.

A custom data request has been made to Statistics Canada to collect Census data for each specific geographic sub area. In addition to the areas noted, the City has made a request for population and housing data associated with municipal service (i.e., water and sewer) catchment areas. It is anticipated that this data may not be available at the outset of the project but will be received early in the initiation of the project. A map showing the proposed study area boundary is included in Appendix A. The identified neighbourhoods and additional sub areas are displayed in Appendices B-F respectively.

#### 2.2 Project Rationale and Context

Population, employment and housing projections are especially important as they provide the foundation for the City's long-range land use, transportation, infrastructure,

and capital expenditure planning. The projections are reflected in the City's Official Plan and have been used to inform other strategic planning documents such as the Water and Wastewater Master Plan, the Kingston Transportation Master Plan, the Active Transportation Master Plan, the Employment Land Strategy Review, the Commercial Land Review, and the Kingston Transit Five (5) Year Business Plan 2017-2021.

In 2013, a Population, Housing and Employment Projections Study was completed for the Kingston CMA and the City of Kingston. The 2013 projection study identified low, medium (base), and high case projections over a period of thirty (30) years (i.e., to 2041 using 2011 Census data). Population data released in the 2016 Census has brought about questions regarding the reliability of the 2013 study projections largely due to discrepancies in anticipated versus reported population numbers. Specifically, the base case in the 2013 projection study provided that the 2016 population for the City of Kingston would be 129,870 persons, being 6,460 persons (5.2%) greater than the 2011 population documented in the study. The reported 2016 Census population for the City of Kingston was 123,798, being 435 persons (0.35%) greater than the 2011 Census population. The projections made in 2013 were substantially higher than that experienced in the City as reported by Statistics Canada's Census.

The difference between the anticipated and reported population numbers requires review through the next iteration of projections for the City of Kingston and Kingston CMA. The projections and accompanying analysis should offer insights as to why the 2016 Census population data is at such odds with the anticipated 2016 population numbers. For example, the analysis ought to consider the impact of housing affordability, job growth, in-migration and immigration patterns, and institutional changes (such as enrolment and deinstitutionalization) on the City's population numbers.

It should be noted that there are more than 30,000 post-secondary students attending local post-secondary institutions including Queen's University, St. Lawrence College and Royal Military College. It is understood that these institutions are continuing to support increased enrolment which may not be fully recognized within the Census. A separate component of this study will therefore include an analysis of estimated student population change and its impact on future housing demand. The projected change is not to be included in the overall projections for the Kingston CMA and City of Kingston due to a higher margin of error in data available for this segment of the population. Multiple sources of data should be utilized to obtain the most accurate forecast of the student population to 2046.

There have also been recent trends observed in the City of Kingston in regards to the employment sector, such as growth in the agri-business/food processing sector through foreign direct investments. The City of Kingston is receiving international attention through these projects with increased interest from foreign investors. Providing further

insight and recommendations into such trends will be required to assist in the City's economic development planning initiatives. Additional factors that will need to be considered in preparing the employment forecasts include the proposed expansion of the Kingston Airport and proposed VIA Rail improvements. Consideration will also need to be provided to the macro-environment and priorities of the Provincial and Federal governments.

### **2.3 Municipal Documents**

As noted, population, housing and employment projections are used to inform land use policy largely articulated in the City's Official Plan.

The projections are also used in the advancement of strategic City-building documents including, but not limited to:

- Kingston's Strategic Plan 2015-2018, prepared by the City of Kingston (online link: [Kingston's Strategic Plan](#))
- Kingston Transportation Master Plan, prepared by AECOM, October 2015 (online link: [KTMP Report](#))
- City of Kingston Employment Lands Strategy Review, prepared by Watson and Associates Economists Limited, in association with Dillon Consulting Limited, March 2015 (online link: [Employment Lands Strategy](#))
- City of Kingston Commercial Land Review, prepared by SGL Planning and Design Inc., in association with urban Metrics Inc., 2016 (online link: [Commercial Land Review](#))
- Development Charges Background Study and By-Law, prepared by Watson and Economists Ltd., 2014 (online link: [DC Study](#))
- City of Kingston and Kingston CMA Population, Housing and Employment Projections, prepared by Meridian Planning and C4SE, October 17, 2013 (online link: [Population Study](#))
- City of Kingston 2011 Neighborhood (online link: [Neighbourhood Profiles](#))
- The City of Kingston and the County of Frontenac Municipal Housing Strategy, 2011 (online link: [Municipal Housing Strategy](#))
- The City of Kingston and the County of Frontenac 10 Year Municipal Housing and Homelessness Plan (online link: [Municipal Housing and Homelessness Plan](#)), December 17, 2013.

- Report Number 14-146 - Urban Growth Boundary Update, April 15, 2014 (online link: [Urban Growth Boundary Update Report](#))
- Report Number PC-017-035 – Pending and Committed Residential Development July 1, 2016 to December 31, 2016 (online link: [Pending and Committed Residential Development](#))
- Urban Residential Growth and Density Study, April 2013 (online link: [Urban Residential Growth and Density Study](#))
- Water and Wastewater Master Plan Updates, Master Plan Document – Final Report, prepared by WSP Canada Inc., February 17, 2017 (online link: [Water and Wastewater Master Plan](#))
- Report Number 17-116 – City of Kingston Workforce Development and In-Migration Study, prepared by 8020Info Inc., April 25, 2017 (online link: [Workforce Development and In-Migration Study](#))
- Kingston (Norman Rogers) Airport – 2007 Master Plan Study, prepared by MMM Group in association with InterVISTAS Consulting Inc., August 2007 (online link: [Kingston \(Norman Rogers\) Airport – 2007 Master Plan Study](#)).

### **3.0 Objectives**

#### **3.1 Objectives**

The main objectives to be accomplished through the population, housing and employment projections study are as follows:

- a) Forecast the change in institutional population (those residing in collective dwellings) and non-institutional population (those residing in private dwellings) presented in five-year intervals in the Kingston CMA and the City of Kingston to 2046;
- b) To forecast “natural” population growth (births and deaths) in five-year intervals in the Kingston CMA and the City of Kingston to 2046;
- c) To forecast the net migration rate in five-year intervals for the Kingston CMA and the City of Kingston to 2046;
- d) To forecast the anticipated change in household size for the Kingston CMA and City of Kingston to 2046;
- e) To estimate the amount (both rental and ownership housing) and type of housing required to accommodate the projected change in population to 2046 for occupied and unoccupied dwelling units;
- f) To evaluate and identify trends and future change in the City of Kingston’s rental market;

- g) To estimate student population change in the City of Kingston based on enrolment growth at local post-secondary institutions and to forecast the impact of change on housing demand to 2046;
- h) To forecast the amount and type of employment growth projected in five-year intervals for the Kingston CMA and the City of Kingston to 2046 and to further forecast this growth by various employment sub-sectors.
- i) To evaluate employment trends and provide commentary on what key industrial sectors and other priority areas should be the focus for economic development planning.
- j) To evaluate and offer opinion on the factors responsible for the population discrepancies found in the 2013 projections and the 2016 Census, as well as what components of the 2013 study may still be valid.

## **3.2 Study Approach**

### **3.2.1 Project Start-up and Background Investigations**

A project start-up meeting will be held at the outset of the assignment to identify data needs and information that may assist the consultant in advancing background investigations. The meeting will also be used to finalize the work program, project schedule, and community engagement plan.

All relevant municipal documents and information will be provided to the consultant during the project start-up meeting. In addition to providing electronic copies of the plans, studies and other reports noted in this Terms of Reference, the City will provide the consultant access to digital data that can be used in a Geographic Information System (GIS).

### **3.2.2 Public Engagement**

The City of Kingston will work with the successful proponent to present relevant information on a project webpage, hosted on the City's website ([City of Kingston Website](#)). It is anticipated that two informal public meetings will be held. The first of these meetings will be used to introduce the project objectives and to seek out preliminary feedback. The second of these meetings will be used to present preliminary findings and to receive public input on the findings. The City's Communications Department will work with the project team to promote the two meetings and to announce when new materials may be available via the project webpage.

In addition to these informal consultative sessions the consultant will be expected to present at the City's Planning Committee during the non-statutory public meeting and also present the final report to the City's Planning Committee. The consultant may also be asked to attend the Council meeting at which the final study will be presented.

City staff will be responsible for presenting information to various stakeholders and provide the consultant with a summary of any input received.

### **3.2.3 Development of the Draft Population, Housing and Employment Projections Study**

The Draft Population, Housing and Employment Projections Study must satisfy the objectives identified in Section 3.1 and shall culminate in the preparation of a report that must be submitted for review and comment by City staff. It is anticipated that the draft report will include, at a minimum, the following key components:

- **Executive Summary:** Overview of the objectives of the study, the methodology used, and findings, including concluding remarks regarding the population, employment and housing projections as they relate to managing change in the Kingston CMA and City of Kingston to 2046.
- **Background:** Overview of the economic base, historic growth patterns, and major growth drivers within the Kingston CMA and City of Kingston as well as any other information that may be relevant in establishing a framework for the projections.
- **Policy Context:** Overview of relevant sections of the Provincial Policy Statement and the City of Kingston Official Plan as they relate to managing land use over the long term.
- **Method:** A description of the method used in carrying out the projections for population, employment and housing in addition to a description of any underlying assumptions and the rationale for making such assumptions. The growth forecasting approach used for this study must include a detailed discussion of the growth assumptions and statistical sources used. In the discussion regarding census data, the study should clearly define and distinguish between the census count, postcensal population estimates and intercensal adjustments in user friendly language.
  - The method employed should produce low, medium (base) and high case projections for population, housing and employment in the Kingston CMA and the City of Kingston from 2016 to 2046, presented in five-year increments. The method should draw upon the projections made through the City's 2013 study.
  - The method should allow for the comparison of data within sub areas of the City of Kingston (as identified in Appendices B-F);
  - The method employed should also allow for a review of population, housing and employment change occurring within the urban and the rural areas of the City, defined by the Urban Growth Boundary illustrated in Schedule 2 to the City's Official Plan; and identified in Appendix F;
  - The method should allow for a review of trends in the various employment sectors;

- The method should allow for a review of rental market trends in the City of Kingston; and
- The method should allow for a separate review of the future student population and associated housing demand, presented in five-year increments from 2016 to 2046.
- **Findings and Analysis:** A detailed overview of the projections for the Kingston CMA and City of Kingston including substantiated commentary on why particular trends may be occurring and how population, employment and housing trends may be expected to change over the long term. The identification and analysis of housing trends shall also include a component on the City of Kingston's rental market. It is expected that the consultant will confer with local rental unit providers to obtain data and further insight into rental market trends observed in the City of Kingston. The City has established a preliminary list of rental unit providers and initiated contact with these providers to support the collection of data as part of this analysis.

Trends should also be identified and discussed for the identified sub areas illustrated in Appendices B-F. Assumptions made in the analysis should be clearly identified and rationalized. It is anticipated that other relevant projections, such as those undertaken in the County of Frontenac, County of Lennox and Addington and Kingston CMA municipalities will be reviewed in supporting the findings of this study.

Employment trends in various sub-sectors should be analyzed and commentary provided on the specific employment types that are forecasted to remain stable or experience substantial growth or decline. Recommendations are to be provided on the key industrial sectors or priority areas that the City should be considering for economic development planning, particularly within the next five (5) to ten (10) years.

Estimating student population change and forecasting its impact on housing demand is to be presented as a separate component and not incorporated into the overall population, housing and employment projection numbers. However, findings should be discussed in the analysis of the overall projections where applicable.

The information presented must be clear to the reader and may be best accompanied by tables, graphs, and other visual aids as appropriate.

- **Impact of Public Input:** An overview of the public input received through the presentation of preliminary findings and a response regarding how such input was considered in advancing the final version of the study. It is anticipated that public input may be summarized with an appendix to the final study.
- **Conclusion:** Final remarks on the findings and how they align with Provincial and local planning policy.
- **Supporting Documents:** The City requires that all supporting documents be provided in electronic format upon completion of the projections.

## **4. Available City Resources**

### **4.1 City Services**

The City agrees to provide available information and supply the following services:

- a. Within a reasonable timeframe and with reasonable notice, staff required for interviews to collect information.
- b. For viewing and possible copying, all appropriate information, mapping, and documentation relevant to the project. The City will have the sole discretion in determining what information is appropriate to be copied and given to the consultant. The consultant is responsible for verifying the accuracy of all information provided by the City.
- c. The cost of any advertising, room rental and refreshments required for meetings open to the public. The City will be responsible for preparing and placing all advertising and notices and renting appropriate facilities.
- d. Relevant data that the City may be able to provide. The City will be obtaining census data for a number of custom geographies, including all the sub areas that are to be captured by this study. To assist in the analysis of the City's rental market, the following data will also be compiled and made available:
  - o Canada Mortgage and Housing Corporation (2007-2016)
  - o Statistics Canada Census (2001-2016) – Housing, Tenure
  - o Municipal Property Assessment Corporation data (prepared in an excel format)

City staff will also be consulting with the post-secondary institutions to obtain enrolment data that will be provided to the consultant. Additional post-secondary data and employment data can also be obtained through access to Analyst, which is an online database managed by the Ontario Ministry of Agriculture, Food and Rural Affairs.

Data should not be purchased without first confirming with the municipality that the data is not already available to the City.

### **4.2 Digital Sources of Information**

Mapping is recognized as an important element in the project. The current GIS (Geographic Information Systems) environment at the City of Kingston is an enterprise GIS based on an ESRI/ArcGIS software platform.

The City Base Mapping (CBM) conforms to specifications from the Ministry of Natural Resources 1:2000 Ontario Base Mapping. The CBM contains numerous layers

representing various themes of information. The CBM is geo-referenced to Universal Transverse Mercator Projection using coordinate values in metres, based on NAD 1983.

Appropriate base mapping in ArcGIS geodatabase format will be provided to the consultant, subject to the terms of a City of Kingston Data License Agreement, which indicates the municipal ownership of the map data, the requirement for City acknowledgements, and the terms of any third party usage of the information. The terms of the agreement will be included in a form as part of the project contract.

#### **4.3 Aerial Photography and Ortho Imagery**

The City's imagery data consists of both contact prints and digital ortho-rectified data. Ortho-rectified digital data is geo-referenced to the City Base Mapping and parcel fabric at 1:2000 scale. Ortho-rectified data is based on a variety of air photo collection dates, with the most recent being 2015.

### **5. Resource Requirements**

The consultant is required to provide details on the resources they will provide and require as part of their proposal. This includes their firm's resources, third party consultants or subcontractors, and City resource requirements outside of those defined in Section 4 above.

### **6. Milestones and Results**

It is expected that the consultant will identify the key milestone dates and any related deliverables as part of the proposal submission. These milestones and deliverables are in part dependent on the proposed program and can be modified with justification. The proposed timelines are estimates and it is expected that future discussion will be had in regards to targeted dates to complete milestones. The following are some of the main milestones and deliverables that will be integral to the project.

- a. Entering into a contract with the City (January, 2018);
- b. Holding a project commencement meeting(s) with the City (January/February, 2018);
- c. Background investigations (February/March, 2018)
- d. First informal public meeting (March, 2018);
- e. Preparation of Draft Projections and Preliminary Report for City staff review and comment (April or May, 2018);
- f. Second Informal Public Meeting (May, 2018);

- g. Finalization of Projections and Summary Report (May or June, 2018);
- h. Presentation of Report to Planning Committee (Non-Statutory Public Meeting) (June, 2018);
- i. Presentation of Comprehensive Report (Recommendation) to Planning Committee (July, 2018);
- j. Presentation of Final Report to Council (July or August, 2018).

### **6.1 Client Meetings**

It is expected that the consultant team will engage with the project manager assigned to this undertaking on a regular, scheduled, basis. Meetings may be held by conference call to lessen costs, as appropriate.

### **6.2 Presentations**

Presentations to the public are critical to the project and its implementation. All of the presentations are to be made by the consulting team and staff within the context of an open and publicly accessible meeting, and should be designed to maximize the engagement of participants. The City is in the process of establishing a new Community Engagement Framework that ought to be consulted in preparing this assignment.

### **6.3 Timing**

It is the intention of the City to commence the study by January 2018. A six month timeline to complete the study would be preferred, however, it is recognized that additional time may be required, particularly in the event that custom data from Statistics Canada is not received prior to project commencement. Any anticipated deviations from this timing should be noted in the work plan submitted with the proposal.

### **6.4 Study Products**

The final report for the Population, Housing and Employment Projections Study will be a written document supported by illustrations, images and mapping. The document shall be prepared in accordance with the requirement of this RFP, and in a format that is accessible and compatible for use with the City's existing system (refer to Section 7.2 and Appendix G)

## **7. Interim and Final Reporting**

Prices will be subject to verification at any time. The successful proponent will be required to submit such substantiating documentation as the City deems necessary to

verify pricing on invoices. The successful proponent must provide reporting on all products delivered upon request of the City.

The successful proponent shall be responsible for complying with all applicable laws and regulations related to the subject matter of this RFP.

## **7.1 Study Updates**

The successful consultant team shall provide, on a monthly basis, a written status report to the Planning Division. The updates must outline the work completed and provide an estimate of financial commitments.

## **7.2 Product Delivery**

All documentation for the Population, Housing and Employment Projections Study shall be prepared using Microsoft Office and/or Adobe InDesign software. All mapping will be compatible with municipal software, as outlined in Section B.4.2 above. Illustrations, images and photos shall be provided in TIF or JPEG format, and shall be readable by the City's software programs. All inventories, databases and mapping shall be ArcGIS compatible.

In order to ensure that the final document will be suitable for publication on the City's website, specific requirements are listed in the document entitled "City of Kingston Requirements for Web Site Publication of Consultant Reports and Associated Items", which is attached as Appendix H. All materials must be suitable for web publication in accessible formats under the *Accessibility for Ontarians with Disabilities Act* (refer to Appendix H for specific details).

All draft reports are to be submitted in electronic format.

All final reports and products are to be produced in accordance with the requirements of the RFP. For the final version of all documents, **five (5) copies**, including a letter of transmittal and any maps and attachments, shall be provided along with the following:

- a. one (1) copy of the final document, including maps, illustrations, photographs and any appendices in a digital format;
- b. one (1) digital copy of the final document in its original software format;
- c. one (1) digital copy of any maps in ESRI shapefile (or updates as appropriate) and one full size copy of all maps (where applicable);
- d. one (1) digital copy of ArcGIS-compatible data of any databases; and
- e. one (1) digital copy of photographs and photo re-imaging in TIF or JPEG format.

The delivered products resulting from the Population, Housing and Employment Projections Study are to be owned by the City of Kingston and are subject to the provisions of the *Municipal Freedom of Information and Protection of Privacy Act*.

## 8. Evaluation of Proposals

The City is committed to enhancing the environmental, economic, social and cultural sustainability of our organization and our community through the thoughtful purchasing of goods and services. Although purchase price is an important element in the evaluation of proposals, there are other factors that the City considers valuable in evaluating responses.

The City intends to select a proponent on the basis of demonstrated experience, quality of work, and best overall value to the City, as demonstrated by the proposal that attains the highest score out of the maximum one hundred (100) points available, based on the following evaluation criteria:

### a. Pricing and Related Costs 30%

Prices are to be quoted in Canadian Dollars, excluding taxes.

Pricing must be all inclusive of the components required to complete this work.

Evaluation points for the purchase price criteria will be awarded using a pro-rated methodology whereby the lowest price submission will receive the maximum available points (30) for purchase price. Higher price submissions will receive a pro-rated reduction in points in relation to the variance to the lowest priced submission.

For example:

Cost Proposal Score =  $\frac{\text{Lowest Qualified Financial Proposal}}{\text{Financial Proposal}} \times 30$  points

### b. Company Profile and Experience and Qualifications of the Project Team 30%

As part of the evaluation of the proposals, preference will be given to those consulting teams that can illustrate the following:

- a. Expertise in economics, land use planning and development;
- b. Expertise in population projection modelling and forecasting;
- c. Expertise in housing and employment forecasting; and,
- d. Experience in community engagement and public consultation.

### c. Proposed Work Plan and Quality of Approach and Submission 30%

Proposed work plan, approach and methodology

- d. Understanding of Objectives** **5%**
- e. Accessibility Standards for Customer Service, Ontario Regulation 429/7** **5%**

*Ontario Regulation 429/7* is made under the authority of the *Accessibility for Ontarians with Disabilities Act, 2005* (AODA). The proponent must provide required documentation that they are in compliance with the Accessibility Standards for Customer Service. For organizations with 20 or more employees, attach a copy of your Customer Service Accessibility Compliance report that was filed through Service Ontario. All components of the public engagement plan for this project must be accessible, and any documents provided for posting to the City's public website must meet Web Content Accessibility Guidelines (WCAG) 2.0 Level AA standards as outlined in the AODA.

An evaluation team comprised of staff members will review all proposals received and score them in relation to the evaluation criteria and points identified in this section. The evaluation team may interview short-listed proponents in person or via electronic or conference call means.

The Respondent agrees that the City, if deemed necessary, verify with the Respondent or with a third party the information provided in any response.

## **9. Project Costs**

The contract between the City of Kingston and the consultant team shall specify the cost for the project. The cost shall be considered an upset figure, which should not be exceeded. It should be noted that the City of Kingston does not normally release budgets as part of RFPs. It is noted that project cost is one of the proposal evaluation criteria.

Further in this regard, please note the following:

- a. The cost of advertising, room rentals and refreshments required for meetings open to the public in the context of the public consultation process will be paid by the City of Kingston. The City of Kingston will be responsible for the preparation and placing of all advertising and notices and renting appropriate facilities.
- b. The cost of any presentation support materials, exhibits and project products will be the responsibility of the consultant team.
- c. The proposal must outline all costs associated with supplying the identified services, including printing. The total price must be stated clearly in the proposal and the work plan shall clearly identify the person-hours and fees associated with

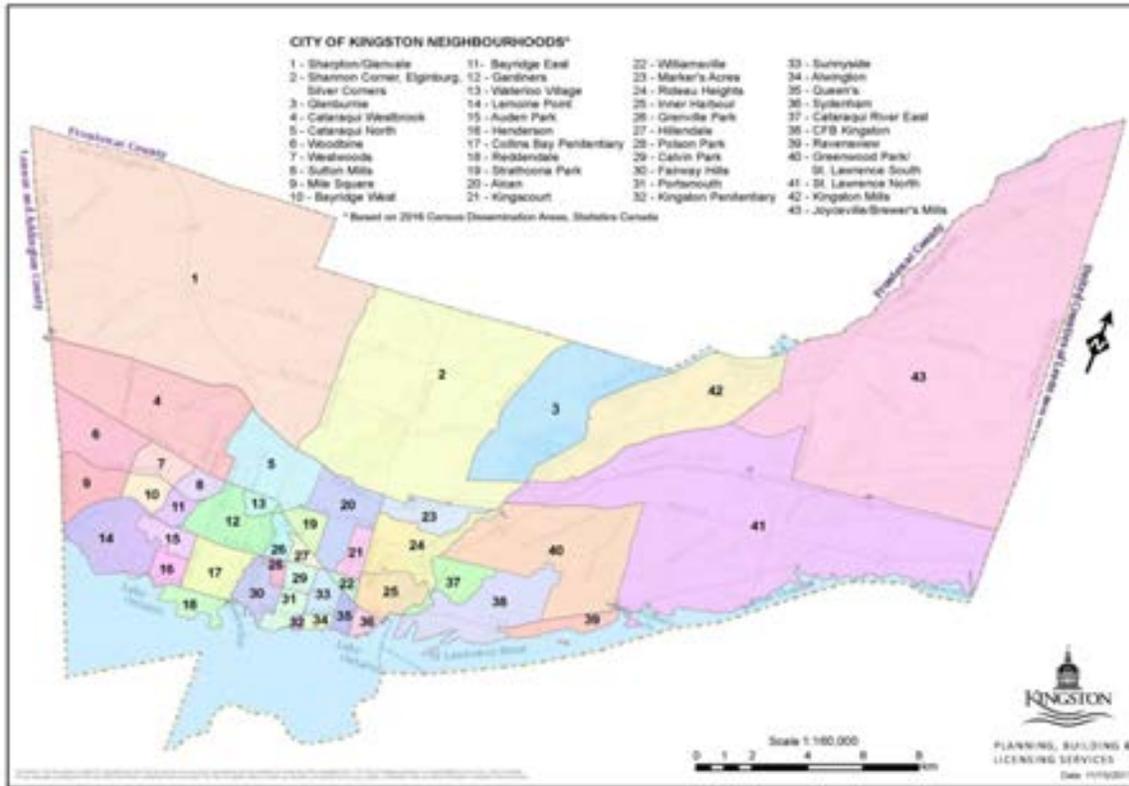
each task. Final selection will be subject to successful contract negotiations with the preferred consultant team.

- d. All prices should be quoted in Canadian dollars net of applicable taxes. Taxes shall be shown as a separate line item on all invoices. Submissions must be set out in a clear and concise format and must include all associated costs. If no fees are recorded it will be assumed there are no such fees, and invoices will be paid accordingly.
- e. The City shall pay the consultant for providing the services in accordance with the payment terms set out in the contract, provided that the cost to complete the services as set out in the proposal shall be the maximum amount that the City shall be obliged to pay the consultant, unless otherwise agreed to in writing between the parties.

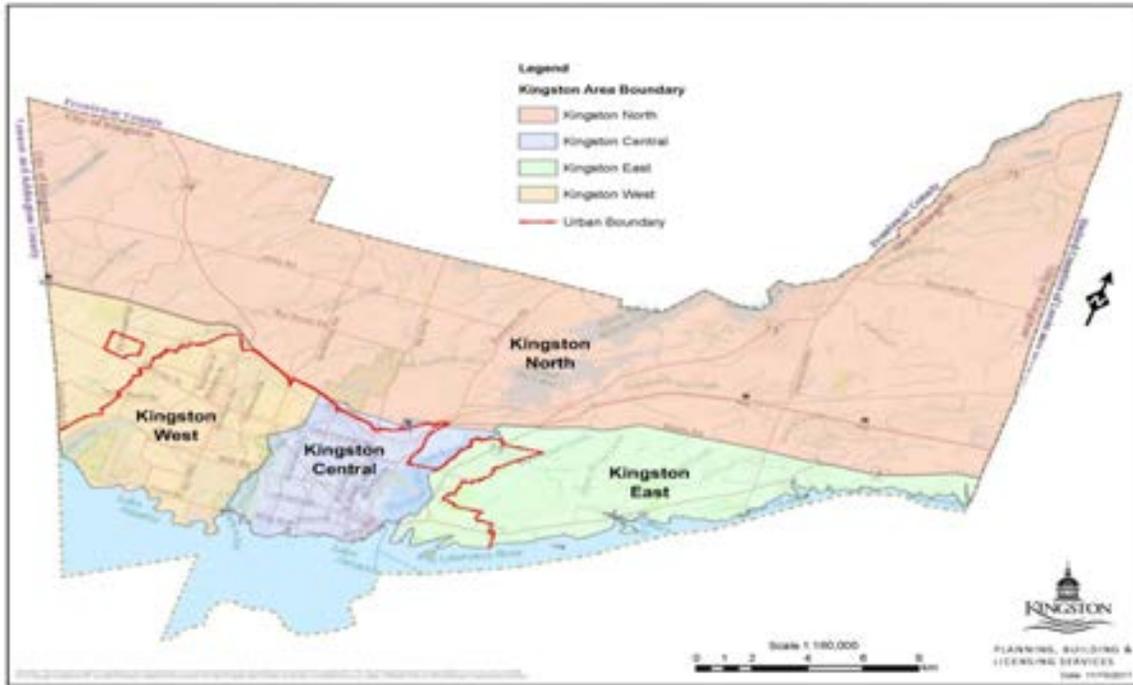
# Appendix A: Proposed Study Area Boundary



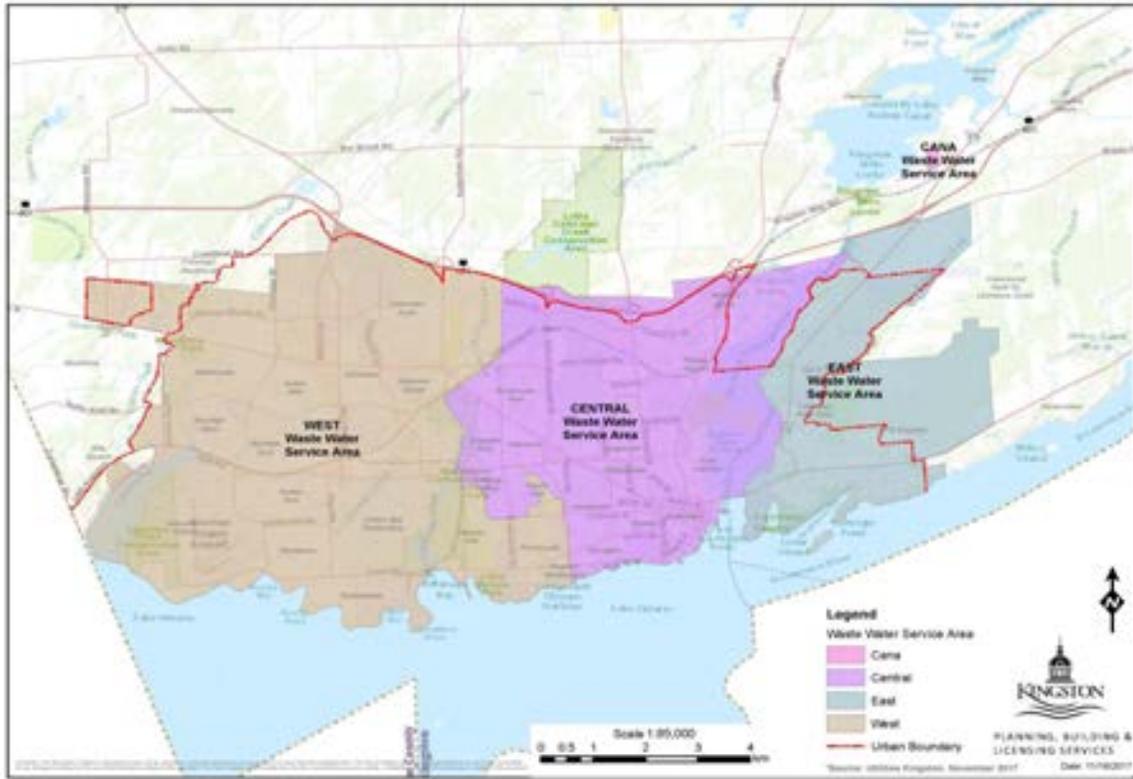
# Appendix B: City of Kingston Neighbourhoods



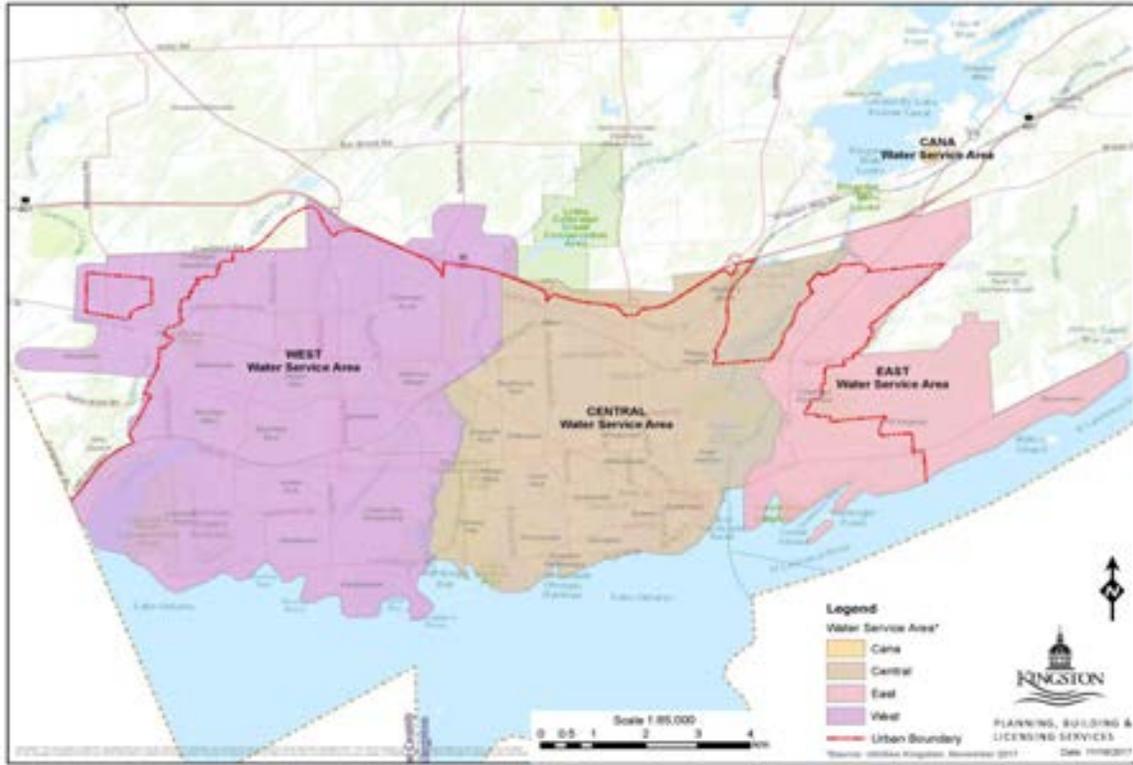
# Appendix C: City of Kingston North, Central, East and West Boundaries



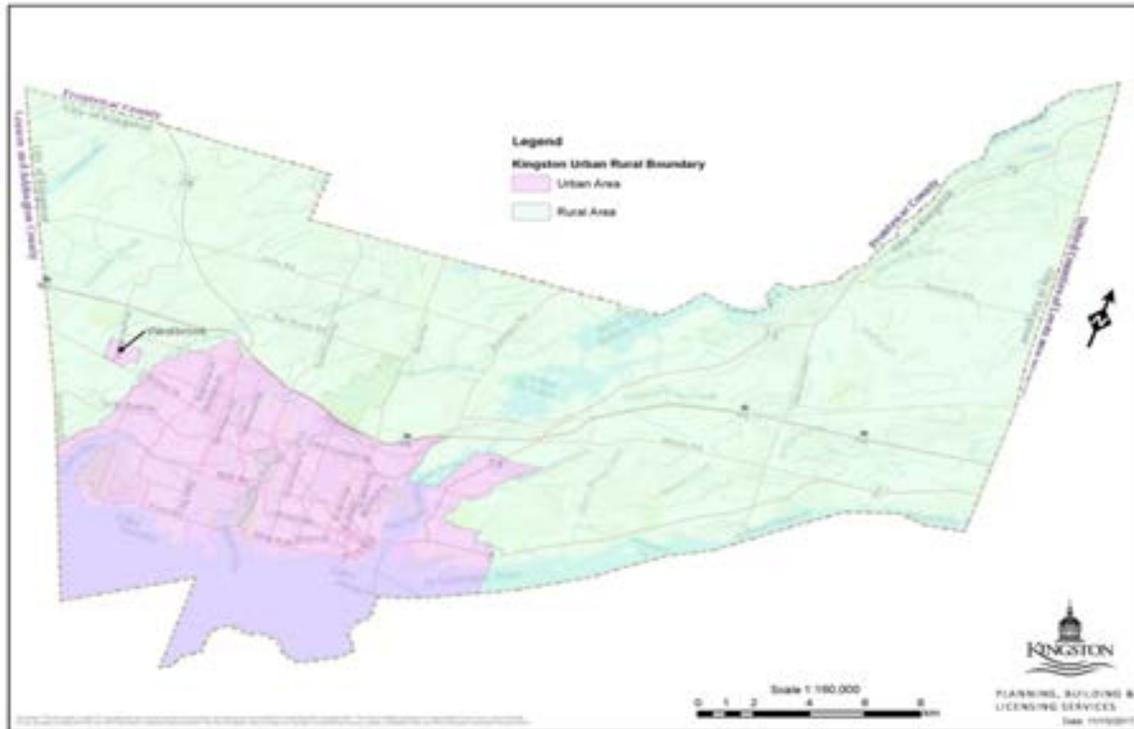
# Appendix D: City of Kingston Waste Water Service Area



# Appendix E: City of Kingston Water Service Area



## Appendix F: City of Kingston Urban and Rural Boundary



## Appendix G: City of Kingston Requirements for Web Site Publication of Consultant Reports and Associated Items

The City of Kingston engages consultants to prepare reports and materials, many of which appear on the City's web site. Information on the web site must comply with the terms of the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA) and the *Canadian Copyright Act*, and be suitable for web publication in accessible formats under the *Accessibility for Ontarians with Disabilities Act, 2005* (AODA).

### Legislative requirements:

- **MFIPPA:** Any piece of information that could be used to identify an individual is considered personal information. The City of Kingston notifies members of the public if the collection of personal information is necessary and may form part of a public agenda. If personal information is **not** needed to make a decision, personal information collected by a consultant should **not** be included in their report.
- **AODA:** As some people use assistive technology to help them use the Internet, it is important that the information provided on the City's web site be compatible with that technology. The City of Kingston requires that report writers/consultants, whose work will be published on the City's web site, provide the source materials of their finished work; for example, Word/DTP files and any images, art and maps used in

the report submitted in their original format. Any documents provided for posting to the City's public website must meet Web Content Accessibility Guidelines (WCAG) 2.0 Level AA standards as outlined in the AODA.

- **Canadian Copyright Act:** The law of copyright also applies to the Internet, and so most individual works found there are protected: using Internet text or graphics without the permission of the copyright holder, for instance, is an infringement of copyright law. Images, art and maps contained in consultant reports submitted for publication on the City of Kingston web site must have been pre-approved by the copyright holder.

**Format requirements:**

- **Document size and orientation:** 8.5 x 11 (letter-sized) and portrait orientation are preferred.
- **Standard fonts:** The Canadian National Institute for the Blind (CNIB) clear print guideline recommends a minimum 12 point font size using standard fonts such as Arial or Verdana.
- **Maps/drawings:** The City of Kingston asks consultants to submit scalable maps/drawings in industry-standard graphics formats such as EPS or a vector-based PDF. **Note:** EPS or PDF files that simply encapsulate raster images do not meet this requirement. Specialty mapping/drawing formats, such as DXF/DWG, should be transformed to scalable EPS or PDF, unless documents in the specialty format were specifically requested for the project. If the maps/drawings are embedded in another document, such as file created by word-processing or desktop-publishing software, the City of Kingston asks consultants to provide the original, scalable map/drawing documents as separate files.
- **Web ready document:** provide digitized copy of source documents, images and maps.

**Source:** City of Kingston – Strategic Communications Department (December 2015)

## Jamie Cook

### Director

Jamie is a Director with Watson & Associates. His extensive experience in demographics, urban planning, and municipal finance enables him to assist clients with a variety of assignments related to growth management, long term land needs forecasting, and fiscal/economic analysis.

Jamie has been with Watson & Associates since 2001. During this time he has undertaken numerous forecasting-based assignments carried out by the firm, largely for municipal and school board clients. In this capacity, Jamie has been a key player in developing the firm's expertise in several core areas, including demographics and growth management, employment lands needs, and economic impact analysis. In addition to his detailed technical knowledge related to demographic, economic and fiscal analysis, Jamie has a comprehensive background in the policy and legislative framework surrounding municipal finance and planning matters.

Jamie also served as a Policy Advisor with the Ministry of Municipal Affairs & Housing from 1999 to 2001. In this capacity, Jamie advised the Office for the Greater Toronto Area (OGTA) and the Minister's office on a number of issues related to land use planning, municipal infrastructure, telecommunications and regional economic competitiveness. Jamie was responsible for the completion of research studies, briefing notes, Minister's responses, and cabinet submissions related to GTA-wide issues.

Jamie is an active member of the Canadian Institute of Planners (CIP) and the Ontario Professional Planners Institute (OPPI). He is also a Professional Land Economist (PLE) and a member of the Economic Developers Council of Ontario (EDCO) as well as the Lambda Alpha International Society of Land Economists.

Jamie holds a Master of Urban and Regional Planning from Queen's University, and an Honours Bachelor's degree in Environmental Science from the University of Guelph.



# Jamie Cook, MCIP, R PP, PLE

## Director

### 1. EDUCATION

- 1999 Queen's University  
M.PL. (Master's of Urban and Regional Planning) Concentration: Land Use and Real Estate, Environmental Planning & Management
- 1997 British Columbia Institute of Technology  
Selected Courses in Geographical Information Systems (GIS) and AutoCAD
- 1996 University of Guelph  
B.Sc. Honours (Environmental Science) Concentration: Natural Resource Management, Resource and Environmental Economics

### 2. EMPLOYMENT HISTORY

- 2001- Joined Watson & Associates Economists Ltd. (formerly C.N. Watson and Associates Ltd.) as a Senior Consultant, progressing to his current responsibilities as Director. Over the past decade, Mr. Cook has evolved a number of the firm's core products related to long range growth management, employment land needs, market demand and municipal finance/economic impacts, which cater to a diverse client base throughout Canada.
- 1999-00 Policy Advisor with the Ministry of Municipal Affairs & Housing. Analyzed and advised the Office for the Greater Toronto Area (OGTA) and the Minister's Office on a number of issues related to land use planning, municipal infrastructure, telecommunications and regional economic competitiveness. Responsible for the completion of research studies, briefing notes, Minister's responses, and cabinet submissions related to GTA-wide issues.
- 1998 Planning Assistant/GIS Specialist for Natural Resources Canada, Strategic Planning Division. Involved in the development of an intranet based facilities management GIS for Natural Resources Canada's nation-wide real property.
- 1997 Planning/GIS Technician: Regional Municipality of Halton Region, Planning & Public Works Department. Assisted municipal planners, engineers and other staff members with mapping services regarding various land use planning, environmental services, and transportation projects within the Halton Region.
- 1996-97 Geological Assistant – Freeport Resources Inc.

### 3. AREAS OF SPECIALIZATION

Jamie Cook has over 19 years' experience in the public and private sector. Over this time period, he has worked in a variety of positions with increasing roles of responsibility. Mr. Cook is an active member of the Canadian Institute of Planners (CIP) and the Ontario Professional Planners Institute (OPPI). He is also a Professional Land Economist (PLE) and a member of the Economic Developers Council of Ontario (EDCO) as well as the Lambda Alpha International Society of Land Economists. Over this time period, he has personally carried out hundreds of assignments in the following areas:

# Jamie Cook, MCIP, RPP, PLE

## Director

(continued)

- a) **Development Charge and Education Development Charge Growth Forecasts** – involving long-term population, household and employment forecasts carried out under the requirements of the *Development Charges Act (DCA), 1997* and the *Education Development Charges Act, R.S.O. 1990*. Mr. Cook has carried out over one hundred growth forecasts for development charges (DC) and education development charges (EDC) background studies as a consultant with Watson & Associates over the past 16 years.
- b) **Growth Management Strategies/Official Plan Growth Forecasts** – prepared as background to a range of studies related to Official Plans, Provincial Growth Plan conformity studies and Secondary Planning studies. Analysis is typically focused on long-term planning and management of residential and non-residential growth and associated land needs. Economic, socio-economic and fiscal impacts are often an important, but generally secondary, role of such analyses. Mr. Cook has been actively working across Canada on a variety of growth management and growth forecast assignments for the past 16 years with Watson & Associates. Mr. Cook has also recently been involved with a number of upper-tier growth management studies and growth conformity exercises across central Ontario as per the requirements of Places to Grow (Provincial Growth Plan for the Greater Golden Horseshoe).
- c) **Employment Land Needs Studies and Employment Strategies** – including employment cluster analysis, long-term supply and demand analysis, municipal comprehensive reviews and long-term land need studies, secondary planning and location options, policy recommendations, economic development strategies, and marketing strategies. Mr. Cook has lead numerous employment land strategies across Ontario and Alberta over the past decade.
- d) **Fiscal and Economic Impact Analysis Studies** – including long-term analysis of fiscal and economic impacts to the municipality and broader economic impacts to the community and surrounding area pertaining to large-scale development projects.

#### 4. ONTARIO MUNICIPAL BOARD HEARING EXPERT EVIDENCE OF JAMIE COOK

Expert witness testimony by Jamie Cook includes the following appearances before the Ontario Municipal Board:

<u>Client</u>		<u>Appellant</u>
Region of Durham (Jacqueline Weber)	(2008)	<u>Beechridge Farms Inc.</u> - Durham Regional Official Plan amendment, Town of Ajax Official Plan Amendment and Town of Ajax Zoning By-law (95-2003) amendment for draft approval of a proposed plan of subdivision for residential development located north of Rossland Road, East, west of the Carruthers Creek, south of the Canadian Pacific Rail Line and East of Old Salem Road (now Spitty Road) in the Town of Ajax.
City of Guelph (Peter Pickfield)	(2009)	<u>Silvercreek Guelph Developments Ltd.</u> – City of Guelph Official Plan amendment, City of Guelph Zoning By-law (1995-12864) amendment required to facilitate a proposed mixed use commercial, retail and residential development for 35 & 40 Silvercreek Parkway South.

# Jamie Cook, MCIP, R PP, PLE

## Director

*(continued)*

Ottawa-Carleton School Boards (Anne Sheppard)	(2010)	<u>Mattamy Homes and the Richcroft Group of Companies</u> – Appeal of the 2009 Education Development Charges By-laws of the four school boards in the Ottawa area.
District of Muskoka (David Royston)	(2010)	<u>Hanna’s Landing Inc., Muskoka Lakes Association, Rick Spence and Friends of Port Carling</u> – Appeal of Township of Muskoka Lakes Official Plan Amendment No. 40.
City of Barrie (Robyn Carlson)	(2012)	<u>Mapleview Veteran’s Drive Investment Inc. and Veterans Drive Holdings</u> - Official Plan and Zoning By-law amendment to re-designate and rezone lands known municipally as 133-147 and 99-105 Mapleview Drive West, hereafter referred to as the subject sites, from a General Industrial land use designation and a Service Industrial EM3 zoning to a General Commercial designation and General Commercial C4 zoning.
Region of Waterloo (Brian Duxbury)	(2012)	<u>Region of Waterloo Official Plan Appeal</u> – 1541179 Ontario Ltd. and Lee Silvestri Investments Ltd. (jointly), 1589805 Ontario Inc., 215881 Ontario Inc., 2140065 Ontario Inc. and Others.
Region of Halton (Robert Doumani/ Jody Johnson)	(2014)	<u>Region of Halton Development Charge (DC) Background Study Appeal</u> – Building Industry and Land Development Association, Calloway REIT, Dundas to Sixth-Line Developments Inc., Embee-Jovic Development Group, and Others.
Town of Richmond Hill (Barnet Kussner)	(2014)	<u>Baif Developments Ltd., Zamani Homes Ltd., Robert Salna and Robert Salna Holdings Inc.</u> – Appeals of the Proposed New Official Plan for the Town of Richmond Hill.
City of Barrie (Bruce Engell)	(2015)	<u>City of Barrie Growth Management (Phase 1)</u> – Appeal of Official Plan Amendment (OPA) No. 39 and No. 40 by Trans Canada Pole Ltd. and Innisbrook Golf Course.
Township of King (Tom Halinski)	(2016)	<u>Township of King Official Plan Amendment No. 57</u> – Appeal of Nobleton North Holdings Inc.