Region of Waterloo
Transportation and Environmental Services
Transportation

To: Chair Tom Galloway and Members of the Planning and Works Committee

Date: March 22, 2016

File Code: D09-90/2016 TMP

Subject: Consultant Selection – Transportation Master Plan Update

Recommendation:
That the Regional Municipality of Waterloo enter into a Consulting Services Agreement with IBI Group to provide planning and engineering services for preparation of the Transportation Master Plan Update, at an upset fee limit of $700,000, plus applicable taxes.

Summary:
A Transportation Master Plan (TMP) defines how the Region’s transportation system will grow and change in the coming decades. The TMP provides the justification for many other strategic plans. Moving Forward 2031, the current TMP, was approved by Council in 2010 in response to several new provincial and local policy initiatives that have a significant influence on the future direction of transportation in Waterloo Region. Changes to provincial and local policy initiatives mean it is now time to update the TMP. Regional staff is fully committed to other projects at this time and therefore staff recommends that an external consultant be hired to complete this project.

The Region issued a Request for Consulting Services and followed the Region’s Purchasing By-law for assignments of this nature. Four (4) proposals were received, out of which three (3) were shortlisted. Following a review and assessment of the detailed submissions, including detailed work plans, schedules and price, the consultant selection team recommends that IBI Group be retained to undertake this assignment at a total upset fee of $700,000, plus applicable taxes.
1. Background

A Transportation Master Plan (TMP) defines how the Region’s transportation system will grow and change in the coming decades. The TMP provides the justification for the Ten Year Transportation Capital Program, updates to the Regional Development Charges By-Law, and many other strategic plans. Preparation of a TMP provides a periodic opportunity to accomplish the following tasks:

- Review the current state and long-term vision for transportation;
- Analyze the overall transportation system in a strategic manner;
- Integrate transportation planning with other strategic plans; and
- Consult with a broad range of stakeholders.

Moving Forward 2031, the current TMP, was approved by Council in 2010 in response to several new provincial and local policy initiatives that have a significant influence on the future direction of transportation in Waterloo Region. These include the Growth Plan for the Greater Golden Horseshoe, the Regional Growth Management Strategy, the Regional Official Plan and the Rapid Transit Project. Moving Forward 2031 involved significant public consultation and resulted in a vision to have a transportation system that would accomplish the following goals:

- Optimize the transportation system;
- Promote transportation choice;
- Foster a strong economy; and
- Support sustainable development.

Changes to provincial and local policy initiatives (i.e. new growth forecasts in the provincial growth plan and approval of the Regional Official Plan) mean it is now time to update the TMP. Regional staff is fully committed to other projects at this time and therefore staff recommends that an external consultant be hired to complete this project.

2. Consultant Selection

On January 15, 2016, the Region issued a Request for Consultant Services inviting consultants to submit proposals for the TMP Update. Four proponents submitted proposals that were reviewed by a consultant selection team consisting of:

- Geoffrey Keyworth, Acting Manager, Strategic Transportation Planning
- Tabot Eneme, Transportation EIT
- Paula Sawicki, Manager, RT Coordination
- John Hill, Manager, Development Planning
The consultant selection process was carried out in accordance with the Region of Waterloo’s Purchasing By-law 04-093 for the procurement of goods and services, and included price as a factor. The evaluation criteria were subdivided into Quality, Equity and Price factors as follows:

- Quality factors:
  - Project Approach and Understanding 25%
  - Qualification/Experience of Project Manager 20%
  - Qualification/Experience of Project Support Staff 20%
  - Experience of the Consultant on Similar Projects 15%

- Equity Factors:
  - Current Workload of the Consultant with the Region 3%
  - Local Office of the Consultant 2%

- Price Factor:
  - Proposal price 15%

Prior to opening the Financial Proposal envelopes containing the proposal price information, the Quality and Equity factors were evaluated. Based on the initial scores, three (3) of the four (4) proponents were shortlisted, as follows:

- Dillon Consulting
- IBI Group
- MMM Group

The proposals submitted by the shortlisted consultants demonstrated a good understanding of the project, capable project teams and experience on similar projects. The Financial Proposal envelopes were opened in the presence of Denise Schmidt, Buyer, on February 24, 2016. When considering all Quality, Equity and Price factors, the submission from IBI Group received the highest points in total. IBI Group’s proposal price was not the lowest price, but was approximately 1% lower than the average price of the shortlisted proposals. Therefore, staff recommends that IBI Group be awarded this assignment.

The scope of work for the assignment involves the tasks outlined in Appendix A. Subject to Council’s approval of this assignment, work will commence in April, 2016 and is expected to be completed by Spring 2018.

**Corporate Strategic Plan:**

The Transportation Master Plan is directly related to the Sustainable Transportation Focus Area and all four Strategic Objectives:

- Create a public transportation network that is integrated, accessible, affordable
and sustainable;

- Improve inter-city rail transportation services to and from Waterloo Region;
- Build infrastructure for, and increase participation in, active forms of transportation (cycling and walking); and
- Optimize road capacity to safely manage traffic and congestion.

It also influences all other Focus Areas, namely:

- Thriving Economy
- Environment and Sustainable Growth
- Healthy, Safe and Inclusive Communities
- Responsive and Engaging Government Services

Financial Implications:

The 2016 Ten Year Transportation Capital Program includes a total budget of $550,000 in the years 2016 and 2017, and will be funded from the Development Charge Reserve Fund. However, the total estimated cost of the project is $800,000, as follows:

- Consulting services assignment: $700,000
- Public opinion survey: $50,000
- Internal fees: $10,000
- Other project-related expenses: $40,000

When the scope of the consulting services assignment was initially estimated for the 2016 Budget, the TMP Update did not include some items that have since increased the scope, such as:

- Integration of Active Transportation Master Plan
- Goods movement
- Inter-city rail (a new Strategic Objective in the Corporate Strategic Plan)
- Public transit priority measures

The amount currently allocated in 2016 ($400,000) is sufficient to accommodate the expected expenses for this year. Additional required funding in the amount of $250,000 to complete the project in 2017 and 2018 will be included in the 2017 – 2026 Transportation Capital Program.

Other Department Consultations/Concurrence:

In addition to the Transportation Division, the Project Team comprises members of Regional Council (Tom Galloway and Elizabeth Clarke) and staff from the following divisions:
- Community Planning;
- Corporate Communications;
- Design and Construction;
- Healthy Living;
- Rapid Transit;
- Transit Services;
- Finance; and
- Fleet and Facilities.

As the project progresses, staff from other divisions will be consulted as required.

**Attachments**

Appendix A – Breakdown of Consultant’s Upset Fee

**Prepared By:** Geoffrey Keyworth, Acting Manager, Strategic Transportation Planning

**Approved By:** Thomas Schmidt, Commissioner, Transportation and Environmental Services
## Breakdown of Consultant’s Upset Fee

<table>
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<tr>
<th>Task</th>
<th>Price</th>
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<tbody>
<tr>
<td>Project Management</td>
<td>$138,300</td>
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<tr>
<td>Phase 1: Problems and Opportunities</td>
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<td>Phase 2: Alternatives Assessment and Preferred Solution</td>
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<td>Phase 3: Supporting Strategies</td>
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<td>Phase 4: Transportation Master Plan Preparation</td>
<td>$69,600</td>
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<tr>
<td>Consultation &amp; Engagement</td>
<td>$184,740</td>
</tr>
<tr>
<td><strong>Total Upset Fee (plus applicable taxes)</strong></td>
<td><strong>$700,000</strong></td>
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