

To: Economic and Development Services Committee

From: Anthony Ambra, P.Eng., Commissioner,  
Economic and Development Services Department

Report Number: ED-24-73

Date of Report: May 28, 2024

Date of Meeting: June 3, 2024

Subject: The proposed Terms of Reference for undertaking updates to  
the Integrated Transportation Master Plan and Active  
Transportation Master Plan

Ward: All Wards

File: 03-05

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## **1.0 Purpose**

The purpose of this Report is to obtain Council approval of the proposed Terms of Reference (“T.O.R.”) for undertaking the review and update of the City of Oshawa’s (“City”) existing Integrated Transportation Master Plan (“I.T.M.P.”) and the Active Transportation Master Plan (“A.T.M.P.”). The results of this work, hereafter referred to as “the Study”, will be used to strategically define the current role and function of all modes of transportation and address travel demands associated with future growth.

Attachment 1 is the proposed T.O.R. for undertaking updates to the Integrated Transportation Master Plan and the Active Transportation Master Plan.

## **2.0 Recommendation**

That the Economic and Development Services Committee recommend to City Council:

That, pursuant to Report ED-24-73 dated May 29, 2024, concerning the proposed Terms of Reference for undertaking updates to the Integrated Transportation Master Plan and Active Transportation Master Plan, as generally set out in Attachment 1 to said Report, be approved.

## **3.0 Executive Summary**

Not applicable.

## **4.0 Input From Other Sources**

The following have been consulted in the preparation of this Report:

- Commissioner, Corporate and Finance Services Department
- Commissioner, Community and Operations Services Department
- Commissioner, Safety and Facilities Services Department

## **5.0 Analysis**

### **5.1 Background**

In 2015, Council approved the City's inaugural I.T.M.P. with the A.T.M.P. The 2015 A.T.M.P. was a stand-alone document and a Technical Appendix to the 2015 I.T.M.P. The purpose of an I.T.M.P is to guide in achieving a balanced, sustainable, multi-modal transportation system in the City of Oshawa while the A.T.M.P guides in achieving a connected, attractive and convenient active transportation system that offers a high degree of comfort and safety, expands recreation options and encourages sustainable modes of transportation in the City of Oshawa.

As part of the Budget process, Council approved Capital Project 40-0043 for an "Integrated Transportation Master Plan Update" to retain a consultant to undertake updates to the Integrated Transportation Master Plan and Active Transportation Master Plan.

The T.O.R., as part of an appropriate Request for Proposal package (the "R.F.P."), represents a means of securing a qualified Consultant to provide consulting services to undertake the Study.

### **5.2 Terms of Reference**

Staff have prepared the T.O.R. which form Attachment 1 to this Report.

The primary objective of the Study is to develop a comprehensive and integrated transportation plan that guides the City's transportation system up to 2051 and beyond. The plan will establish a clear vision for the future of transportation in the City of Oshawa, identify and prioritize the transportation needs of the community, and provide policy direction and specific strategies to meet those needs.

The I.T.M.P. team will work closely with the Official Plan Update team to ensure that any proposed changes are consistent within both documents.

The intent of the Study is to:

- Prioritize active and sustainable transportation and offer a range of convenient, safe, and equitable modes of transportation to meet the growing demands. This plan will develop recommendations for policies and projects that will contribute to a more sustainable, equitable, diverse, attractive, healthy, and safe city.

- Be flexible and adaptable to address and accommodate future trends and emerging mobility options and technologies. It must also consider trends such as work from home opportunities, car sharing, demographic changes, and other matters that are resulting in changing travel behaviour.

Other objectives of the I.T.M.P. and A.T.M.P. updates are to:

- Assess the outcomes of the 2015 I.T.M.P. and A.T.M.P., identifying deficiencies, effects of changing context and opportunities for improvement.
- Revisit the recommendations of the 2015 I.T.M.P. and A.T.M.P. that have not yet been implemented to determine whether they remain valid.
- Assess and confirm the recommendations from the Region of Durham's Transportation Master Plan Update and the Region's 10-Year Capital Plan that affect the City.
- Review recent legislative and policy changes, trends and best practices in transportation planning for their impacts and applicability within City of Oshawa.
- Identify data gaps.
- Identify the transportation infrastructure and programs necessary to support the City's Official Plan, coordinating with provincial, regional and other external policy documents.
- Undertake a detailed analysis of the City's transportation network and recommend improvements for capacity, operations and safety for the horizon year of 2051.
- Develop appropriate and achievable mode share targets for the short term (10 years) and long term (2051).
- Undertake a road rationalization assessment to identify and justify a list of candidate road segments for possible transfer of ownership and responsibility to the most appropriate municipal authority (City or Region).
- Undertake an assessment of all one-way couplets within the City to identify best operational configuration to prioritize complete streets approach.
- Identify opportunities for intersection improvements, including roundabout opportunities.
- Examine policies and initiatives to support alternative modes of transportation and transportation demand management in promoting healthy and diverse communities.
- Identify strategies, policies and infrastructure needed to support safe and efficient goods movement in and through City of Oshawa.
- Identify transportation corridors that should be protected.
- Identify needs for improvements to transportation infrastructure and services and mechanisms for implementation.

- Provide recommendations regarding best practices for minimizing the impacts of the City’s transportation infrastructure on the natural, social and cultural environment.
- Develop discussion papers to provide insights on emerging technologies.
- Provide a basis for possible amendments to the transportation related policies and schedules of the City’s Official Plan and implementing documents.
- Develop an implementation plan, including key priorities, that will meet the future transportation infrastructure and program needs of the City in a timely, efficient, cost effective and affordable manner.
- Provide opportunities for meaningful consultation of agencies, stakeholders and the general public.
- Identify opportunities to solicit enrolment for volunteers and to provide input on opportunities for enhanced Promotional and Educational events and programs.
- Follow the Municipal Class Environmental Assessment Master Planning process (Approach Number 1).

Once approved, staff will issue an R.F.P. for qualified consultants to review and submit proposals to undertake the Study.

### **5.3 Next Steps**

If approved by Council, the following key deliverables/anticipated dates are associated with this Study:

<b>Milestone</b>	<b>Milestone Date</b>
R.F.P. Issued	July 2024
R.F.P. Award	September 2024
Study Commencement	October 2024
Development of a Clear Statement of the Problem or Opportunity	April 2025
Public Information Centre Number 1	April 2025
Assessment of Alternatives and identification of Preferred Transportation Scenario	October 2025
Public Information Centre Number 2	October 2025
Development of Supporting Strategies	February 2026
Public Information Centre Number 3	February 2026
Preparation of Integrated Transportation Master Plan Report	May 2026
Public Information Centre Number 4	May 2026

Milestone	Milestone Date
Notice of Study Completion	June 2026

## 6.0 Financial Implications

The proposal selected as a result of the proposed T.O.R. will be funded using the budget allocation approved under Capital Projects 40-0043 for \$650,000.

## 7.0 Relationship to the Oshawa Strategic Plan

The recommendation advances the Accountable Leadership, Economic Prosperity and Financial Stewardship, Environmental Responsibility, Social Equality and Cultural Vitality goals of the Oshawa Strategic Plan.



Greg Hardy, P.Eng., PMP, Director,  
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Anthony Ambra, P.Eng., Commissioner,  
Economic and Development Services Department

## Part C – Terms of Reference

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## 1.0 Introduction

This Request for Proposal (“R.F.P.”) is being issued primarily as a means of securing proposal packages from qualified, licensed, transportation engineering and planning consulting firms to undertake the review and update of the City of Oshawa’s (“City”) existing Integrated Transportation Master Plan (“I.T.M.P.”) and the Active Transportation Master Plan (“A.T.M.P.”). The City has many new projects that are planned or are currently under construction that are anticipated to cause changes to local travel patterns and demands on local transportation networks. Due to these changes, an updated I.T.M.P. (“Study”) is required that will strategically define the current role and function of all modes of transportation and address travel demands associated with future growth.

The Study must meet the requirements of the Municipal Class Environmental Assessment (“M.C.E.A.”) master planning process (Approach Number 1) and complete Phases 1 and 2 of the process.

In the preparation of their proposals, Proponents are strongly encouraged to present their vision for the Study, including any potential alternative activities and deliverables that better meet the objectives of this R.F.P.

### 1.1 Background

With a growing population of approximately 185,000 residents, the City of Oshawa lays within the Regional Municipality of Durham and the Greater Toronto Area. Oshawa is bordered by the Town of Whitby to the west, the Township of Scugog to the north, the Municipality of Clarington to the east, and Lake Ontario to the south.

The City of Oshawa has experienced significant residential, commercial, and institutional growth in recent years, and this growth is forecasted to continue in the coming decades. The City’s integrated transportation network, which includes highways 401 and 407, the Oshawa Executive Airport, Canadian National Rail and Canadian Pacific Rail and the Port of Oshawa Seaway, easily moves people and products locally, regionally and around the globe

In 2015, Council approved the City’s first I.T.M.P., which was developed to be consistent with the Oshawa Strategic Plan goals.

### 1.2 Available Documents

The following documents are available for review online:

- **2015 Integrated Transportation Master Plan** – a copy has been attached.
- **2015 Active Transportation Master Plan** – a copy has been attached.
- **City of Oshawa Accessibility Plan:** The Accessibility Plan is available on the City’s website at the following link: <https://www.oshawa.ca/en/city-hall/plans-reports-and-studies.aspx>.

- **City of Oshawa Age-Friendly Strategy:** The Age-Friendly Strategy is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/plans-reports-and-studies.aspx>.
- **City of Oshawa Bloor-Simcoe Intensification Study:** The Bloor-Simcoe Intensification Study is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/development-studies.aspx>.
- **City of Oshawa Citywide Parking Study (2021):** The Citywide Parking Study is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/development-studies.aspx>.
- **City of Oshawa Design Criteria and Standard Drawings:** City of Oshawa Design Criteria and Standard Drawings are available on the City of Oshawa website at the following link: <https://www.oshawa.ca/en/business-development/engineering-design.aspx>.
- **City of Oshawa Development Charge Background Study:** The City of Oshawa's Development Charges Study is available on the City's website at the following link: <https://www.oshawa.ca/en/business-development/development-charges.aspx>
- **City of Oshawa Diversity and Inclusion Plan:** The Diversity and Inclusion Plan is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/plans-reports-and-studies.aspx>.
- **City of Oshawa Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study:** The Integrated Columbus Part II Planning Act and Municipal Class Environmental Assessment Act Study is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/development-studies.aspx>.
- **City of Oshawa Integrated Major Transit Station Area Study for Central Oshawa:** The Integrated Major Transit Station Area Study for Central is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/development-studies.aspx>.
- **City of Oshawa Stevenson Road North Environmental Assessment:** The Stevenson Road North Environmental Assessment is available on the City's website at the following link: <https://www.oshawa.ca/en/business-development/environmental-assessments.aspx>.
- **City of Oshawa Strategic Plan:** The Strategic Plan is available on the City's website at the following link: <https://www.oshawa.ca/en/city-hall/plans-reports-and-studies.aspx>.
- **City of Oshawa Official Plan:** The City of Oshawa's Official Plan is available on the City of Oshawa website at the following link: <https://www.oshawa.ca/en/business-development/official-plan.aspx>.

- **City of Oshawa Plan 20Thirty:** The Plan 20Thirty is available on the City of Oshawa website at the following link: <https://www.oshawa.ca/en/business-development/plan-20thirty.aspx>.
- **Region of Durham Community Climate Adaptation Plan (2016):** The climate adaptation plan is available on the Region website at the following link: [https://www.durham.ca/en/living-here/resources/Documents/EnvironmentalStability/DCCAP\\_Print.pdf](https://www.durham.ca/en/living-here/resources/Documents/EnvironmentalStability/DCCAP_Print.pdf).
- **Region of Durham Cycling Plan:** The Regional Cycling Plan is available on the Region of Durham website at the following link: <https://www.durham.ca/en/living-here/regional-cycling-plan-2021.aspx>.
- **Region of Durham Meadoway Visioning Study:** The Region of Durham Meadoway Visioning Study is available on the Region of Durham website at the following link: <https://yourvoice.durham.ca/durham-meadoway>.
- **Durham Regional Official Plan:** The Durham Regional Official Plan is available on the Region of Durham website at the following link: <https://www.durham.ca/en/doing-business/official-plan.aspx>.
- **Region of Durham Simcoe Street Rapid Transit Visioning Study:** The Region of Durham Simcoe Street Rapid Transit Visioning Study is available on the Region of Durham website at the following link: <https://www.simcoestreetrapidtransit.ca>.
- **Region of Durham Transportation Master Plan:** The Durham Transportation Master Plan is available on the Region of Durham website at the following link: <https://www.durham.ca/en/living-here/transportation.aspx>.
- **Metrolinx Background Information on Bowmanville Expansion:** Metrolinx’s “Community Documents” serving as background for the Bowmanville Expansion, including the appendices to the 2011 Environmental Assessment, are available online at the following link under the heading of “Bowmanville Expansion”:  
[http://www.metrolinx.com/en/aboutus/publications/community\\_documents.aspx#bowmanville](http://www.metrolinx.com/en/aboutus/publications/community_documents.aspx#bowmanville).
- **Metrolinx Initial Business Case Update (2020):** Metrolinx’s Initial Business Case Update: Bowmanville Rail Service Extension is available online at the following link: <http://www.metrolinx.com/en/regionalplanning/projectevaluation/benefitscases/2020-02-20-Bowmanville-Rail-Service-Extension-IBC-Update-FINAL.pdf>.
- **Metrolinx Transit Project Assessment Process Environmental Assessment Study (2011):** Metrolinx’s Oshawa to Bowmanville Rail Service Expansion and Rail Maintenance Facility Transit Project Assessment Process Environmental Assessment Study, completed in 2011, is available online at the following link: [http://www.metrolinx.com/en/regionalplanning/rer/Bowmanville\\_EPR\\_EN.pdf](http://www.metrolinx.com/en/regionalplanning/rer/Bowmanville_EPR_EN.pdf).

### 1.3 Objectives

The primary objective of the Study is to develop a comprehensive and integrated transportation plan that guides the City's transportation system up to 2051 and beyond. The plan will establish a clear vision for the future of transportation in the City of Oshawa, identify and prioritize the transportation needs of the community, and provide policy direction and specific strategies to meet those needs.

The Study must:

- Prioritize active and sustainable transportation and offer a range of convenient, safe, and equitable modes of transportation to meet the growing demands. This plan will develop recommendations for policies and projects that will contribute to a more sustainable, equitable, diverse, attractive, healthy, and safe city.
- Be flexible and adaptable to address and accommodate future trends and emerging mobility options and technologies. It must also consider the impact of the Covid-19 pandemic on changing travel behaviour.
- Identify data gaps.
- Assess the outcomes of the 2015 I.T.M.P. and A.T.M.P., identifying deficiencies, effects of changing context and opportunities for improvement.
- Revisit the recommendations of the 2015 I.T.M.P. and A.T.M.P. that have not yet been implemented to determine whether they remain valid.
- Assess and confirm the recommendations from the Region of Durham's Transportation Master Plan Update and the Region's 10-Year Capital Plan that affect the City.
- Review recent legislative and policy changes, trends and best practices in transportation planning for their impacts and applicability within City of Oshawa.
- Identify the transportation infrastructure and programs necessary to support the City's Official Plan, coordinating with provincial, regional and other external policy documents.
- Undertake a detailed analysis of the City's transportation network and recommend improvements for capacity, operations and safety for the horizon year of 2051.
- Develop appropriate and achievable mode share targets for the short term (10 years) and long term (2051).
- Undertake a road rationalization assessment to identify and justify a list of candidate road segments for possible transfer of ownership and responsibility to the most appropriate municipal authority (City or Region).
- Undertake an assessment of all one-way couplets within the City to identify best operational configuration to prioritize complete streets approach.
- Examine policies and initiatives to support alternative modes of transportation and transportation demand management in promoting healthy and diverse communities.

- Identify strategies, policies and infrastructure needed to support safe and efficient goods movement in and through City of Oshawa.
- Identify transportation corridors that should be protected.
- Identify needs for improvements to transportation infrastructure and services and mechanisms for implementation.
- Provide recommendations regarding best practices for minimizing the impacts of the City's transportation infrastructure on the natural, social and cultural environment.
- Develop Discussion Papers on emerging technologies.
- Provide a basis for possible amendments to the transportation related policies and schedules of the City's Official Plan and implementing documents.
- Provide a framework for future transportation decisions in the City.
- Develop an implementation plan that will meet the future transportation infrastructure and program needs of the City in a timely, efficient, cost effective and affordable manner.
- Provide opportunities for meaningful consultation of agencies, stakeholders and the general public.
- Follow the Municipal Class EA Master Planning process (Approach Number 1).

## **2.0 Scope of Services**

The list of work described hereafter are not necessarily complete and should be augmented as required and as believed necessary based on the Proponent's experience and knowledge. It is the responsibility of the Proponent to identify and supply any service not described (or omit any described service found not to be required) in the scope of work but which may be reasonably implied to be required to discharge the scope of work covered in this Request for Proposal.

Proponents are encouraged to identify innovative alternatives to the scope of work described herein that would provide additional value to the project.

The scope of work shall include, but not limited to, activities and tasks identified in the following sections.

### **2.1 Study Phases and Tasks**

#### **2.1.1 Phase 1: Study Initiation, Background Review, Problem or Opportunity Statement**

The first phase of the Study will focus on: initiating the study, reviewing the outcomes of the 2015 I.T.M.P. and A.T.M.P.; understanding the views of the community; identifying the best practices established in other communities; and, establishing a transportation system baseline. These tasks will set the framework for establishing a transportation vision,

corresponding goals and principles for action, and assessing different transportation alternatives for the City.

### **Task 1.1: Data Collection and Gaps**

Prior to the Project Initiation Meeting, the City will prepare a package of data/information/reports currently available and will be transmitted electronically to the successful Proponent. The Proponent will review the package, determine any data gaps, and prepare a **Data Gaps Summary memo** for discussion with the City. The summary will recommend additional data collection requirements. All data gaps will be filled by the Proponent.

It should be noted that all signalized intersections within the Region of Durham are under regional jurisdiction. The most current intersection turning movement counts, Automatic Traffic Recorder (“A.T.R.”) counts and Annual average daily traffic (“A.A.D.T.”) data available from the Region can be downloaded from their web site through the interactive [traffic counts map](#). Other traffic data, including signal timings, will need to be requested from the Region.

Proponents are to carry sufficient budget to collect necessary traffic data for all intersections (unsignalized) and road segments under the City’s jurisdiction that will be required for the Study. The Proponent should assume that no current traffic data is available from the City.

### **Task Deliverables**

- A Data Gaps Summary memo, detailing the recommend additional data collection requirements for the Study.

### **Task 1.2: Assessment of the 2015 I.T.M.P. and A.T.M.P. Outcomes**

Performance measurement is a necessary step in assessing progress towards the achievement of predetermined goals. The assessment of the 2015 I.T.M.P. and A.T.M.P. outcomes will measure the City’s progress toward both plan’s stated goals and principles. A set of clearly defined measures will be developed that are understandable and acceptable to all stakeholders.

The assessment of I.T.M.P. and A.T.M.P. outcomes will include:

1. Undertaking an inventory of the transportation system in the City, including improvements in infrastructure, facilities and service for all modes that have been completed.
2. Assessing changes in travel trends through data sources such as the Transportation Tomorrow Survey, Census Place of Work Data, travel time survey data, traffic count data, and transit ridership data.
3. Assessing the impact of the recommendations of both plans.

4. Determining whether the recommendations have achieved their desired effect, have had limited effect, have not been achieved or are no longer considered desirable.
5. Changes to policies, organizational structures and the roles of various agencies need to be examined as they impact the policy context then and now. Barriers to achieving the recommendations will be identified, as well as opportunities for advancing recommendations which have not been completed.

### **Task Deliverables**

- A Discussion Paper, with supporting Technical Appendices, detailing the outcomes of the 2015 I.T.M.P. and A.T.M.P, providing an inventory of the transportation system, and changes in travel trends since 2015. This Discussion Paper will be usable as a stand-alone document that can be updated regularly by City staff in the future and released to Council and the public as a transportation status report for the year showcasing the implementation of the recommendations of the Study.

### **Task 1.3: Survey of Community Views**

The views of the community will assist in guiding the Study, and will present an array of opportunities and challenges for the City to consider through its planning efforts. As such, the update should result in a reasonable level of “buy in” from City of Oshawa residents and businesses.

This task will include:

1. Designing and carrying out a survey of City of Oshawa residents’ views regarding transportation issues, opportunities and choices;
2. Building a profile of the “typical” commuter and their commuting behaviour;
3. Establishing the community’s views on the complete array of transportation modes and travel opportunities available within the City;
4. Providing an understanding of the willingness of the community to alter their travel behaviour and transportation choices; and,
5. Identifying barriers and opportunities to assist the community in moving towards more sustainable transportation options.

### **Task Deliverables**

- A Discussion Paper reporting on the results of the public opinion survey, including details of the background and purpose, the research objectives, survey methodology, key findings, conclusions and implications. The Proponent shall propose a sample size sufficient to provide city-wide results at a confidence level of 95%.
- If the Proponent feels that additional tasks, meetings, workshops or other activities are necessary to achieve the objectives of the Study, the Proponent is requested to detail

those activities with their expected benefits as Value Added items. Costs of additional activities should be included as **Provisional**.

#### **Task 1.4: Current State of Practice and Policy Review**

An examination of best practices will be completed and gleaned for applicability and relevance to the City of Oshawa, from an environmental, social, economic and cost perspective. Current plans and policies from adjacent Municipalities, Region of Durham, the Ministry of Transportation of Ontario (“M.T.O.”), Metrolinx, and Transport Canada will be compiled, regarding issues and potential directions for the Study.

This task will include:

1. Examining best practices applied in other Canadian and international jurisdictions (e.g. legislation, regulations, policies, guidelines) on how best to influence and change travel patterns and modal trends to support a more sustainable transportation system;
2. Completing an overview of the costs and benefits of key soft and hard infrastructure investments, technological improvements, operational and service improvements, policy strategies, programs and promotional and outreach programs undertaken in other jurisdictions, from a triple bottom line perspective (economic, environmental, social);
3. Compiling a list of transportation issues and policy directions that should be considered in the Study, through consultation and review of external agency transportation master plans, active transportation master plans, cycling and trails plans, and Official Plan policies relevant to transportation, including Metrolinx’s Regional Transportation Plan and other provincial, federal policies and plans; and,
4. Preparing Discussion Papers on (in addition to the list compiled in the above task):
  - Active Transportation
  - Transportation Demand Management (“T.D.M.”)
  - Parking
  - Transit (from a lower tier municipality perspective, as transit is a regional service)
  - Transportation Equity
  - Complete Streets
  - Micromobility
  - Road Safety
  - Economic Development and Goods Movement
  - Curbside Management
  - Infrastructure Financing
  - Emerging Technologies
    - Autonomous/connected vehicles
    - Shared mobility services
    - Big Data

These discussion papers will review current state of practice, best practices, and recommendation of applicable policies, plans, actions to be included in the Study for

updates to the Official Plan, and City’s policies, by-laws, procedures, guidelines, and standards.

### **Task Deliverables**

- A Best Practices Discussion Paper, including an overview of benefits and costs and a summary of findings, that provides broad directions for future transportation infrastructure and policy planning in the City of Oshawa. The Discussion Paper will include the list of transportation issues and policy directions that are relevant to the Study and Discussion Papers on the following topics:
  - Active Transportation
  - Transportation Demand Management
  - Parking
  - Transit
  - Transportation Equity
  - Complete Streets
  - Micromobility
  - Road Safety
  - Economic Development and Goods Movement
  - Curbside Management
  - Infrastructure Financing
  - Emerging Technologies
    - Autonomous and Connected Vehicles
    - Shared Mobility Services
    - Big Data

### **Task 1.5: Development of a Clear Statement of the Problem or Opportunity**

Based on the work completed as part of the previous tasks, prepare a problem and opportunity statement for the Study.

### **Task 1.6: Development of a Vision, Goals, and Principles**

The 2015 I.T.M.P. and A.T.M.P. established separate visions for the City. Based on the work completed as part of the previous tasks, the Proponent will work with City staff and the Technical Agency Committee to establish a unified vision and associated goals and principles to provide the basis for the Study.

### **Task 1.7: Mode Share Targets**

The Proponent will develop appropriate and achievable mode share targets for the short term (10 years) and long term (2051).

### **Task 1.8: Alternative Transportation Scenarios**

The Proponent will develop a set of four (4) alternative transportation scenarios that address the transportation vision, while reflecting a reasonable range of emphasis on

sustainable travel modes. The alternative transportation scenarios include, but may not necessarily be limited to:

1. Business as usual (Do Nothing) – a continuation of the current direction for roads, transit and active transportation based on a 10-year history, taking into consideration currently planned road, trails and transit improvements.
2. Two (2) alternate transportation scenarios that take into account significant reduction in peak period auto travel achieved through increased sustainable travel modes.
3. Balanced/combination – a more modest program of network improvements for sustainable travel modes combined with selective road network improvements.

### **Task 1.9: Development of Assessment Criteria**

The Proponent shall also develop a set of assessment criteria that will be applied in Phase 2 of the Study to select a preferred transportation scenario to be carried forward in the Study.

This task will include:

1. Reviewing the potential market for various travel mode choices in Oshawa, and using the potential modal shares to frame the four alternative transportation scenarios for the 2051 horizon year;
2. Developing assumed 2051 transportation networks, with related policies, service levels etc., that are representative of each alternative transportation scenario, based on previous planning documents, results from the previous tasks, and in consultation with City staff;
3. Developing a preliminary list of criteria to be applied to the assessment of the alternative transportation scenarios;
4. Carrying out the first formal community consultation, and using the feedback to finalize the vision, goals, principles, alternative transportation scenarios and assessment criteria.

### **Task Deliverables**

- A Discussion Paper documenting development of the updated vision, goals, principles, alternative transportation scenarios and assessment criteria, incorporating the Technical Appendices from the previous tasks as background material.

### **Task 1.10: Community Consultation**

The Proponent will host a Public Information Centre (“P.I.C.”) meeting (both in-person and virtual) to inform the public about the undertaking of the Study and to solicit comments from the public on the problem or opportunity statement, the vision, goals, principles,

alternative transportation scenarios, and assessment criteria and will be responsible for, but not limited to, the following:

1. Preparing Notice of Study Commencement;
2. Preparing all necessary displays and notice for the public meeting;
3. Developing content for project website;
4. Presenting the problem or opportunity statement, the vision, goals, principles, alternative transportation scenarios, and assessment criteria to the Technical Agency Committee;
5. Attending a minimum of one (1) Economic and Development Services Committee meeting to present the results of Phase 1 of the Study and obtain authorization to present the problem or opportunity statement, the vision, goals, principles, alternative transportation scenarios, and assessment criteria to the public;
6. Mailing meeting notifications to all identified groups, including agencies and Indigenous communities;
7. Attending and facilitating the P.I.C.;
8. Compiling the feedback received and providing written responses; and,
9. Documenting the results of the P.I.C.

The City will provide the following support for the P.I.C.:

- Mailing meeting notifications to the public (if required);
- Posting all necessary advertisements for the P.I.C. meeting; and,
- Securing a venue to conduct the in-person P.I.C. meeting.

### **Task Deliverables**

- A Discussion Paper that summarize the results of the P.I.C.

### **2.1.2 Phase 2: Assessment of Alternatives and Identification of Preferred Transportation Scenario**

Through the second phase of the Study, the alternative transportation scenarios developed through Phase 1 will be modelled using a sub model of the Region's Transportation Demand Forecasting Model ("T.D.F.M.") and will be assessed through a set of qualitative and quantitative assessment criteria, including technical, environmental and financial (costing) criteria. An alternative will be recommended that will provide the basis for moving forward with the development of the associated transportation system.

#### **Task 2.1: Model Alternative Scenarios**

The proponent shall modify a sub model of the Region's T.D.F.M. to assess the performance of each alternative transportation scenario against transportation network

performance criteria for the 2031, and 2051 horizon years. The model outputs will provide the basis for the quantitative component of the assessment of alternatives.

This task will include:

1. Developing a transportation modelling approach that is acceptable to the City and the Region. The sub model of the Region's T.D.F.M. will be modified to reflect the level of detail required to support analysis of the City's roadway infrastructure (arterials and collector roads) including any refinement of traffic zones transportation networks while accounting for trips that begin and/or end outside of the City and the Region. Land use (population and employment) forecasts for 2051 will be estimated in consultation with the City and the Region.
2. Coding into the sub model the assumptions for road networks, transit networks and other model parameters for the alternative transportation scenarios that were developed.
3. Quantifying transportation system performance in terms of the quantitative transportation assessment criteria for each alternative transportation scenario.
4. Adjusting the assumed networks and model parameters to ensure that they are reasonably reflective of each alternative transportation scenario.
5. Documenting the modelling assumptions, process and results.

### **Task Deliverables**

- A Discussion Paper documenting the modelling assumptions, process and results.
- Model databanks, electronic files and run streams for each of the modelled alternatives.

### **Task 2.2 Assess Alternative Scenarios**

The Proponent will complete a full assessment of the alternative transportation scenarios against the assessment criteria, using the results from the modelling results as the basis for assessment of the quantitative transportation network performance criteria. The assessment will produce a recommended transportation scenario (or combination of scenarios) to be carried forward into formal community consultation.

This task will include:

1. Evaluating the performance of each alternative transportation scenario against each of the assessment criteria, including completion of a high level financial costing estimate and risk considerations for each scenario.
2. Providing an overall assessment of the alternatives relative to each other and recommending a transportation scenario, or combination of scenarios, to carry forward.
3. Documenting the assessment process and results.

## **Task Deliverables**

- A Discussion Paper documenting the assessment process and results, including explanations of the procedures applied in the assessment, charts/tables detailing the assessment results for each scenario and all criteria, and thorough discussion of the assessment results and recommendations.

### **Task 2.3 Identify Preferred Scenario and Potential Actions**

Building on the assessment completed in the previous task, this task will confirm a preferred transportation scenario. A preliminary list of actions will be developed that could be used to implement the preferred transportation scenario.

This task will include:

1. Developing an initial list of actions to implement the preferred transportation scenario, and relevant best practices.
2. Listing the actions by strategy theme area – i.e., Active Transportation, T.D.M., Transit, Roads, and Goods Movement – with illustrative examples as appropriate.
3. Carrying out the second formal community consultation to obtain feedback on the recommended transportation scenario, associated active transportation, road, and transit networks and initial list of actions.
4. Revising/finalizing the preferred transportation scenario and initial list of actions based on the feedback received.
5. Documenting the assessment of alternative transportation scenarios and the selection of the preferred scenario.

## **Task Deliverables**

- A Discussion Paper documenting the assessment of the alternative transportation scenarios and identification of the preferred scenario, incorporating the content of the Discussion Paper from Task 2.2 and including the modelling Discussion Paper from Task 2.1.

### **Task 2.4 Community Consultation**

The Proponent will host a P.I.C. meeting (both in-person and virtual) to obtain feedback on the recommended transportation scenario, associated active transportation, road, and transit networks, and initial list of actions. The Proponent will be responsible for, but not limited to, the following:

1. Preparing all necessary displays and notice for the public meeting;
2. Developing content for project website;
3. Presenting the recommended transportation scenario, associated active transportation, road, and transit networks, and initial list of actions to the Technical Agency Committee;

4. Attending a minimum of one (1) Economic and Development Services Committee meeting to present the results of Phase 2 of the Study and obtain authorization to present the recommended transportation scenario, associated active transportation, road, and transit networks, and initial list of actions to the public;
5. Mailing meeting notifications to all identified parties, including agencies and Indigenous communities;
6. Attending and facilitating the P.I.C.;
7. Compiling the feedback received and providing written responses; and,
8. Documenting the results of the P.I.C.

The City will provide the following support for the P.I.C.:

- Mailing meeting notifications to the public (if required);
- Posting all necessary advertisements for the P.I.C. meeting; and,
- Securing a venue to conduct the in-person P.I.C. meeting.

### **Task Deliverables**

- A Discussion Paper that summarize the results of the P.I.C.

### **2.1.3 Phase 3: Development of Supporting Strategies**

Strategies supporting the preferred transportation scenario identified in Phase 2 will be developed in Phase 3 of the Study. These strategies will assist in facilitating a more sustainable transportation system, and will focus on the promotion of active transportation and T.D.M. measures, promotion of transit services, the effective use of the road system, and efficient, safe and reliable movement of goods. The strategies will also support the growth and development objectives of the Oshawa Official Plan.

The 2051 active transportation, transit, and road networks associated with the preferred transportation scenario identified in Phase 2 will be refined and confirmed to identify corridors to be protected in the long term.

#### **Task 3.1 Active Transportation**

The 2015 A.T.M.P. was a stand-alone document and a Technical Appendix to the 2015 I.T.M.P. The Proponent shall review and update the 2015 A.T.M.P. in conjunction with work outlined in Phases 1 and 2 of this Study using current best practices, industry trends and regulations with specific consideration of changes to accessibility requirements.

This task will include:

1. Developing/refining the goals and objectives for active transportation to achieve the vision developed in Task 1.6.
2. Recommending policies, guidelines, and programs that provide direction on how to achieve the vision, implement the objectives of the plan, and help shift travel behaviour and promote active transportation.

3. Reviewing and validating the 2015 proposed cycling, trail, and pedestrian network against new and updated policies and standards.
4. Undertaking field work to ground truth the proposed trail network to validate the feasibility and optimum trail location with respect to topography, soils and vegetation removal requirements. Appropriate City staff and representatives from the Central Lake Ontario Conservation Area shall participate and provide input to this exercise as well as to achieve consensus on recommendations.
5. Recommending upgrading of existing or previously proposed active transportation facilities (e.g. Michael Starr Trail, Mary Street, etc.) with input from staff, interested parties, and the public.
6. Identifying roads where road diets can be applied to implement active transportation without negatively impacting road operations.
7. Undertaking comprehensive online or in-person surveys to help identify problem or focus areas to inform the update of the A.T.M.P.
8. Identifying priority areas where the existing active transportation network is discontinuous, inaccessible, and unsafe.
9. Recommending an active transportation network with connectivity to a variety of destinations, including major transit station areas and mobility hubs.
10. Developing policies and strategies to incorporate micromobility into the active transportation network.
11. Developing a practical strategy for prioritizing and phasing the proposed active transportation network, supported by evidence-based decision-making approaches, and supporting policies, programs for the implementation and promotion.
12. Recommending guidelines for on-going maintenance of the network.
13. Developing cost estimates for implementation and maintenance of the network.
14. Recommending a performance management strategy for the implementation of the updated A.T.M.P. to measure the progress of the plan, and to refine the plan on an on-going basis.

### **Task Deliverables**

- A Discussion Paper that documents a comprehensive Active Transportation Strategy, including integrated active transportation network and cost estimates for its implementation and maintenance. This paper will serve to prepare a standalone A.T.M.P., documenting the assessment process, recommendations, and preliminary active transportation network. The document shall include tables that list each recommended active transportation facility, new, improvement, or rehabilitation, with its expected timing, estimated construction cost, and need/rationale.

- City Official Plan policy directions supporting active transportation and pedestrian oriented development.

### **Task 3.2 Transportation Demand Management**

The purpose of this task is to develop a coordinated approach to implementing T.D.M. across the City while leveraging the Region's T.D.M. strategy. This task will building on the Discussion Paper prepared for T.D.M. and will recommend clear roles for all partners in T.D.M. initiatives. The City is seeking an implementation approach that maximizes the resources of all partners and minimizes duplication.

This task will include:

1. Providing a review and summary of Durham Region and Greater Toronto and Hamilton Area wide T.D.M. policies and an analysis of how these policies relate to each other, including any other City priorities and policies that could be furthered through T.D.M.
2. Identifying partners that play a role, or could play a role, in developing and implementing T.D.M. programs, including governments, non-governmental organizations, and the private sector.
3. Identifying best practices, based on case studies of T.D.M. programs that have been implemented successfully in other jurisdictions that are applicable to the City.
4. Recommending T.D.M. policies and programs for the City to implement within the short, medium and longer-terms including making recommendations for T.D.M. polices to be incorporated into the development review process.
5. Developing a framework for implementing these policies and programs, which outlines the roles of the interested parties identified in the report, as well as the role of various departments within the City, with an estimate of the staff requirements and financial resources required, on an annual and overall basis, to implement the recommended T.D.M. policies and programs.
6. Recommending a performance management strategy to measure the success of implementing the T.D.M. Strategy.

### **Task Deliverables**

- A Discussion Paper that documents a comprehensive T.D.M. Strategy.
- Oshawa Official Plan policy directions supporting T.D.M.

### **Task 3.3 Roads**

The purpose of this task is to identify a recommended arterial and collector road network that will accommodate projected vehicular travel demands within the City for the preferred transportation scenario in the 2031 and 2051 horizon years. Potential improvements to, additions to or deletions from the designated arterial and collector network are to be assessed at a screening level to identify the feasibility and impacts of proposed changes.

Road improvements required to achieve the recommended road network are to be identified and prioritized into short, medium and long term time horizons.

Corridors to be designated in the Oshawa Official Plan for future arterial road connections or expansions, beyond the 2051 horizon are to be identified based on the City's existing transportation planning policies, network planning criteria, future development areas and known major constraints, as well as modelling of travel demands for 2051.

This task will include:

1. Identifying strategic screenlines that have capacity deficiencies at 2031 and 2051 horizon years in relation to the previously planned arterial road network by using modelled peak period vehicular demand projections corresponding to the preferred transportation scenario.
2. Undertaking an assessment of all one-way couplets within the City to identify best operational configuration to prioritize complete streets approach.
3. Reviewing road network changes adopted in the 2024 update to City's Development Charges By-law Background Study, Region of Durham's and neighbouring municipalities' T.M.P.s, Official Plans, and Provincial/Metrolinx initiatives, as well as changes proposed by the Region, adjacent municipalities, and other interested parties in the context of capacity needs and other assessment criteria.
4. Identifying network changes that address capacity issues, issues identified by interested parties, and/or issues that address City transportation planning policies and network planning criteria.
5. Assessing the impacts, benefits and costs of proposed road network changes at a screening level. Where there are multiple potential improvements available to address a particular need, this will include comparison of the alternatives to select a recommended approach.
6. Performing several additional modelling runs, based on the preferred transportation scenario, as needed to verify that the proposed road networks will match the projected peak period vehicular travel demands.
7. Preparing draft recommended road networks for the 2031 and 2051 horizon years, with associated capital (life cycle costing) and operating cost estimates, and identifying corridors to be protected for arterial and collector road network expansion.
8. Identifying strategies to protect road corridors, including right-of-way requirements for future widening, promote network expansion as necessary to meet projected demands and mitigate road network impacts.
9. Reviewing the arterial and collector road criteria outlined in the Oshawa official plan and Regional Official Plan and recommending refinements based on surveys, input from the area municipalities, and other interested parties.

10. Identifying roads that operate at higher or lower than their designated capacity and recommend the maintenance of such roads transfers to the Region or City and vice versa.
11. Undertaking a road rationalization assessment to identify and justify a list of candidate road segments for possible transfer of ownership and responsibility to the most appropriate municipal authority (City or Region).
12. Preparing lists of recommended road improvements for the short, medium and long term, including a list of rehabilitation/reconstruction requirements for the short term.

### **Task Deliverables**

- A Discussion Paper that documents the recommended arterial and collector road network, with an implementation strategy that identifies phasing, priorities and cost estimates for build-out of the recommended network.
- Oshawa Official Plan policy directions supporting delivery of the recommended arterial road and collector road network.
- A Technical Appendix documenting the assessment process, recommendations and preliminary road improvements program. The appendix shall include tables that list each recommended city road/intersection expansion, improvement or rehabilitation project, with its expected timing, estimated construction cost and need/rationale.

### **Task 3.4 Transit**

The City's ability to take actions to increase transit usage is limited given that local transit service is provided by Durham Region Transit ("D.R.T."), and regional transit service is provided by Metrolinx. This task will identify gaps and opportunities in the existing and proposed transit network to address any areas within the City that are underserved or have inadequate transit service and make recommendations to support increased densities and intensification of land uses along transit corridors, in major transit station areas, and mobility hubs.

### **Task Deliverables**

- A Discussion Paper that documents the recommendations to address identified gaps and opportunities in the existing and proposed transit network.
- City Official Plan policy directions supporting increased transit service.

### **Task 3.5 Complete Street Design Guidelines and Strategy**

Developing a comprehensive Complete Street Design Guidelines and Strategy is essential to ensure safe, accessible, and inclusive streets that cater to the needs of all road users. This task will build on the work completed in Task 1.4 and assess the City's existing road classification system and its function, design guide and standard, and identify potential areas for enhancement to incorporate complete streets principles.

This task will include:

1. Identifying the key elements of complete streets and their design specifications, including, but not limited to, sidewalks, cycling facilities, multi-use paths, transit infrastructure, vehicular travel lanes, and other facilities/amenities within the boulevard.
2. Establishing a systematic process to review and evaluate road classification and complete street design. This process will ensure that the classification and design align with the objectives of complete streets and adhere to established standards and guidelines.
3. Developing a prioritization tool that assesses and ranks complete street elements based on their importance and impact. This tool will aid in determining which elements should be prioritized for retrofit projects and included in the design of complete streets, considering factors such as safety, connectivity, community needs, right-of-way widths, as well as existing and future land uses.
4. Developing a decision-making framework and metrics to guide the evaluation of design options, highlighting trade-offs and associated high-level capital and operating costs for implementation.
5. Determining the minimum right-of-way width requirements for each road classification to accommodate complete street elements effectively.
6. Reviewing the City's Design Criteria Manual and Standard Drawings to and develop conceptual cross-section designs for all road classifications to incorporate complete streets elements. These designs will serve as a template for new and street improvements and guide the implementation of the complete streets Strategy.
7. Developing complete street policies that promote and support sustainable transportation modes and options. The policies will emphasize the integration of various transportation modal options, including walking, cycling, micromobility, public transit, and driving, in order to create a well-connected and efficient transportation network.
8. Developing a framework for implementing complete streets policies and strategies to ensure that the recommended complete streets design guidelines.

### **Task Deliverables**

- A Discussion Paper that documents a comprehensive Complete Street Design Guidelines and Strategy.
- Oshawa Official Plan policy directions supporting complete street Design.

### **Task 3.6 Economic Development and Goods Movement**

Spurred by increasing growth in the Greater Toronto and Hamilton Area, freight is one of the fastest growing activities in our transportation system. The effective movement of goods is important to Oshawa's economic health and well-being. Since freight and goods

movement trips are largely made via roads under Regional or Provincial jurisdiction, the focus of this task will be to build on the work done as part of Task 1.4 and highlight the role of City in managing goods movement, especially the increase of freight that is related to e-commerce shipments and the impact in the downtown and Urban Growth Centres and the need for Curbside Management.

This task will include:

1. Providing an assessment and audit of the nature of goods movement, existing freight flows and related issues within the City today, and anticipated future directions and challenges.
2. Developing goods movement policy options that address current issues and emerging challenges, while recognizing the critical role of curbside management, and goods movement to City's economic health.
3. Developing a perspective of the current goods movement activity within the City, with an emphasis on trucking and e-commerce shipments. The overview will include developing an understanding of the businesses that generate the freight flows.
4. Examining the future of goods movement in the City in the short, medium and long term time frames.
5. Consulting with key interested parties to identify current issues, future challenges, potential opportunities and solutions for goods movement today and in the future.
6. Identifying the need for further data collection and the requirement for additional work in support of long term planning.
7. Evaluating and recommending appropriate goods movement performance indicators and monitoring methods.

### **Task Deliverables**

- A Discussion Paper that documents the Economic Development and Goods Movement Strategy.
- Oshawa Official Plan policy directions supporting curbside management and goods movement.

### **Task 3.7 Transportation Data Collection Strategy**

In concert with work completed in Task 1.1 and Task 1.4, this task will focus on the development of a robust and proactive transportation data program for effective decision-making and performance monitoring. It will evaluate the City's current data collection program, data sources, and identify gaps, considering relevant data collected by various departments of the City, as well as data requirements identified in transportation and planning studies to understand the gaps between each department.

This task will include:

1. Undertaking consultation with the various City departments and interested parties to understand existing data collection methods, challenges, and goals.
2. Identifying best practices in transportation data collection.
3. Highlighting the significance of data-driven approaches in understanding transportation trends and informing future planning efforts.
4. Outlining data roles and responsibilities of collection, management, and analysis strategies.
5. Reviewing innovative approaches and emerging technologies.
6. Reviewing new data sources, along with the development of a practical use case to inform future transportation planning decisions, moving beyond reliance on traditional traffic data sources.
7. Developing cost estimates for all transportation data collect requirements broken down by the various city departments for inclusion in annual budget process.
8. Recommending a Transportation Data Collection Strategy.

#### **Task Deliverables**

- A Discussion Paper that documents the Transportation Data Collection Strategy.

#### **Task 3.8 Recommended Strategies and Networks**

This task will consolidate the strategies and networks developed into a single, comprehensive document, incorporating the contents of all Discussion Papers produced.

This task will include:

1. Documenting the recommended strategies and networks for active transportation, roads, transit, and economic development and goods movement as well as the recommended T.D.M. strategy and the transportation data collection strategy.
2. Consulting with the Technical Agency Committee to obtain feedback on the recommended strategies and networks.
3. Reviewing and summarizing the feedback received, and incorporating any necessary changes into the recommended strategies and networks.

#### **Task Deliverables**

- A Discussion Paper that consolidates and documents the recommended strategies and networks for active transportation, roads, transit, and economic development and goods movement as well as the recommended T.D.M. strategy and the transportation data collection strategy.

### **Task 3.9 Community Consultation**

The Proponent will host a P.I.C. meeting (both in-person and virtual) to obtain feedback on the recommended strategies and networks. The Proponent will be responsible for, but not limited to, the following:

1. Preparing all necessary displays and notice for the public meeting;
2. Developing content for project website;
3. Attending a minimum of one (1) Economic and Development Services Committee meeting to present the results of Phase 3 of the Study and obtain authorization to present the recommended strategies and networks to the public;
4. Mailing meeting notifications to all interested parties ,including agencies and Indigenous communities;
5. Attending and facilitating the P.I.C.;
6. Compiling the feedback received and providing written responses; and,
7. Document the results of the P.I.C.

The City will provide the following support for the P.I.C.:

- Mailing meeting notifications to the public (if required);
- Posting all necessary advertisements for the P.I.C. meeting; and,
- Securing a venue to conduct the in-person P.I.C. meeting.

### **Task Deliverables**

- A Discussion Paper that summarize the results of the P.I.C.

### **2.1.4 Phase 4: Preparation of the Integrated Transportation Master Plan**

Phase 4 of the Study will finalize the recommended strategies and networks identified in Phase 3 into a recommended I.T.M.P. and an A.T.M.P. as a standalone Technical Appendix. Costs and risk considerations along with tools for the effective implementation and monitoring of the recommended I.T.M.P. and A.T.M.P. will be developed, and full documentation of the Study will be prepared.

### **Task 4.1 Finalize Recommended Strategies and Networks**

This task will finalize the recommended strategies and networks based on input received from stakeholders and the public.

### **Task 4.2 Cost and Risk Considerations**

Cost and risk impacts will be considered throughout the course of the study, specifically as criteria in the development and assessment of alternative solutions and strategies. Once the recommended I.T.M.P. and A.T.M.P. strategies and networks are finalized, the capital,

operating and life cycle costs of implementation, as well as potential risks and liabilities, must be specifically addressed with input from City staff.

This task will include:

1. Establishing the costs (operating and capital, based on a life cycle costing approach) and benefits of the recommended I.T.M.P and A.T.M.P.
2. Developing an understanding of the potential risks and liabilities associated with implementation of the recommended I.T.M.P., and A.T.M.P. at a strategic level, and identifying mitigation measures to address them. This applies to all travel modes.
3. Preparing an I.T.M.P. and A.T.M.P. costing and risk management Discussion Paper.

### **Task Deliverables**

- A Discussion Paper that documents the I.T.M.P. and A.T.M.P. costing and risk management of implementation with supporting Technical Appendices.

### **Task 4.3 Implementation and Monitoring**

The implementation of the recommended I.T.M.P. and A.T.M.P. is enabled by a series of policies, guidelines and recommended actions that will have to be updated or developed as part of this task. Another key aspect of I.T.M.P. and A.T.M.P. implementation is monitoring of the City transportation system's performance to provide feedback for consideration in future adjustments to the plan.

This task will include:

1. Providing recommendations for possible amendments to the transportation-related Official Plan policies and schedules.
2. Developing a roads capital and active transportation program priority setting process to help City staff to formally define priorities for each year's capital program and the nine year forecast, based on criteria such as: existing and projected traffic volumes, potential for safety improvements, network connectivity, pavement conditions and surrounding land uses/development activity.
3. Providing recommendations for follow-up studies and identifying needs for new or revised policies, guidelines and/or standards (e.g. design standards).
4. Developing a monitoring framework (key performance indicators) and schedule that City staff can use to assess the performance of the plans on an on-going basis.

### **Task Deliverables**

- A Discussion Paper that documents the Implementation and Monitoring Plans for the recommended I.T.M.P. and A.T.M.P.
- A capital program priority setting process.

#### **Task 4.4 Study Documentation**

This task will consolidate the deliverables from all of the previous tasks into a draft final report. After a final round of formal consultation, these documents will be finalized and the final versions will be delivered to the City.

This task will include:

1. Preparing draft I.T.M.P. and A.T.M.P. Study reports that document the entire Study process and results and incorporates the Discussion Papers and Technical Appendices from the previous tasks.
2. Carrying out formal consultation with interested parties, including the Region, adjacent municipalities, and the public.
3. Presenting the draft I.T.M.P. and A.T.M.P. Study reports to City Committees and Council.
4. Incorporating feedback received and finalizing the I.T.M.P. and A.T.M.P. Study reports.

#### **Task Deliverables**

- Draft I.T.M.P. and A.T.M.P. Study report, with technical appendices.

#### **Task 4.5 Stakeholder and Public Consultation**

The Proponent will host a P.I.C. meeting (both in-person and virtual) to obtain feedback on the draft of the I.T.M.P. and A.T.M.P Study reports. The Proponent will be responsible for, but not limited to, the following:

1. Preparing all necessary displays and notice for the public meeting;
2. Developing content for the project website;
3. Presenting the draft of the I.T.M.P. and A.T.M.P Study reports to the Technical Agency Committee;
4. Attending a minimum of one (1) Economic and Development Services Committee meeting to present the results of Phase 4 of the Study and obtain authorization to present the draft of the I.T.M.P. and A.T.M.P Study reports to the public;
5. Mailing meeting notifications to all interested parties, including agencies and Indigenous communities;
6. Attending and facilitating the P.I.C.;
7. Compiling the feedback received and providing written responses; and,
8. Documenting the results of the P.I.C.

The City will provide the following support for the P.I.C.:

- Mailing meeting notifications to the public (if required);
- Posting all necessary advertisements for the P.I.C. meeting; and,
- Securing a venue to conduct the in-person P.I.C. meeting.

#### **Task Deliverables**

- A Discussion Paper that summarize the results of the P.I.C.

#### **Task 4.6 Finalization of Study Documentation**

The Proponent shall:

1. Finalizing the draft of the I.T.M.P. and A.T.M.P Study reports and submitting eight (8) hard copies and a digital copy;
2. Preparing a notice of study completion;
3. Filing the final I.T.M.P. and A.T.M.P Study reports with the Ministry of the Environment, Conservation and Parks and posting for a 30 day public review and comment period;
4. Mailing notifications of the study completion to all stakeholders; and,
5. Addressing and resolve all inquiries and public comments.

#### **Task Deliverables**

- Notice of study completion.
- Final I.T.M.P. and A.T.M.P Study reports

### **3.0 Proposal Format**

Evaluation of Proposals is made easier when Proponents respond in a similar manner. Proponent must ensure they address each item in the terms of reference. The following responses are to be entered through the City's bidding system:

- (a) General Company Information shows a viable corporate presence by establishing the existence of a client base, a functioning sales and support organization, and financial stability.
- (b) Key Features of Proposal:
  - A short summary of the key features of the Proposal
- (c) Fee Structure and/or Price Schedule
- (d) References
- (e) List of Subcontractors, if applicable

(f) Proponents are also required to upload the following through the City's bidding system:

- Qualifications and Experience, including:
  - Experience in municipal program co-ordination. Previous experience of contracts of similar or greater size
  - Company Profile; including training and experience
  - Commitment to client satisfaction
- Staff Resumes
- Deliverables, including fee structure
- Work Plan
- Design Drawings
- Warranty information
- Value Added
- Other documents that may be beneficial to your proposal

### **3.1 Project Understanding**

Proponents should provide a comprehensive narrative that illustrates their understanding of the project's requirements and the needs of the City, including a short discussion on the approach to undertaking the assignment.

Proponents should identify how they will identify and implement means to accelerate the project schedule where possible. Proponents should identify project issues and risks and clearly identify how they would mitigate the issues and risks to ensure that the project is successfully delivered on schedule, on budget, on scope and with a high level of quality.

### **3.2 Qualifications and Experience**

Proponents should include a summary of key staff, including their professional qualifications, skills and related project experience, as well as an identification of their duties and responsibilities on this assignment.

#### **3.2.1 Qualifications and Experience: Project Manager**

The Proposal should clearly identify one Project Manager who will be available and dedicated to this project for the duration of the assignment. The Project Manager should be committed to the project and not assign his/her duties to deputy project managers, coordinators, etc. Note that the City reserves the right to terminate the Agreement if the named Project Manager is no longer available to complete the assignment and an acceptable qualified alternative (approved by the City) is not available.

The Project Manager assigned to this project will be the point of contact for all communications throughout this project.

The Project Manager shall be proficient in managing the delivery of Transportation Master Plans that require technical, project management, communication and advanced facilitation and advisory services. The Project Manager should have:

- Proven ability to manage projects of similar size and scope to deliver completed quality work on time and within budget;
- Proven knowledge of provincial and municipal planning processes;
- Proven ability to coordinate a multi-disciplinary team on projects of similar scope and nature;
- Proven ability to work cooperatively and effectively with a wide variety of interests/authorities including the public, levels of government, utility companies, and special interest groups as demonstrated on similar projects; and,
- Proven communication, problem solving, and leadership skills.

Proponents should include details of the Project Managers qualifications and should demonstrate his/her recent experience on previous successfully completed Transportation Master Plans in the last 5 years.

### **3.2.2 Qualifications and Experience: Technical Team**

It is important that key team members be named for each of the disciplines required to complete the project work plan, with an accompanying commitment of guaranteed availability. Continuity of key personnel will be required, with a contractual obligation for substitutes only with full written approval from the City's Project Manager.

Team leads for all required disciplines should be experts in their technical fields who have a detailed understanding of rules, regulations and accepted technical analysis requirements.

Proponents should provide a list of the proposed key staff resources to be utilized on the project and should include their professional qualifications, related project experience, duties, and responsibilities on this particular project.

Proponents that demonstrate previous completion of similar projects using the "same" project team will be scored favourably.

### **3.2.3 Resources**

An organisation chart should be provided that shows all the project team members including sub-consultants.

Proposed resources must be available for the duration of the contract and cannot be changed without prior written authorization from the City.

Proponents shall identify any requirements/expectations regarding roles and involvement of City staff and resources for the project.

#### **4.0 Description of Proposed Services and Deliverables**

Proponents are to address each item listed in Part C, Terms of Reference, Deliverables. Proponents should indicate understanding of the term identified and their ability to comply or detail the deviance from the term in clear, concise language.

##### **4.1 Proponent's Project Management of Services**

The Proponent shall:

- Assign a Principal and a project manager who will direct the Study. The principal and/or the project manager will maintain ongoing contact with the City of Oshawa lead to ensure that issues arising during the terms of the Contract are dealt with in an efficient, effective and timely manner;
- Within 30 calendar days of Contract award, provide one (1) electronic copy of the final Project Management Plan to the City's project manager. This plan will include but not be limited to:
  - Confirmation of the approach to be followed for the project;
  - Identification of which members of the Proponent's project team will be leading and managing each task; and,
  - A project schedule including a schedule of tasks, milestones, identification of which tasks will be occurring concurrently, schedule of progress reports, public and stakeholder engagement points, project meetings, Economic and Development Services Committee meetings, and any additional work or items as required.
- Provide to the City of Oshawa a list identifying the Proponent's, and all sub-consultants', staff assigned to the project;
- Be responsible for coordinating and interfacing with other disciplines required to perform the work under the project;
- Arrange, coordinate and chair in a number of meetings with the City and/or external authorities in connection with the project as required;
- The Proponent's cost for each stage of the project shall not be exceeded without written authorization from the City of Oshawa. The Proponent must monitor its work effort and related cost thereof and manage the provision of each phase of the project. Request for adjustment of costs and schedules must be submitted in writing for consideration by the City of Oshawa;
- Project Reports and Minutes of Meetings;

- Chair, record, prepare and distribute, within five (5) working days of the meeting date, minutes (of all meetings associated with the Study); and,
- Prepare and submit, on a monthly basis, the appropriate cost/budget control reports for the Study, including the overall Study cash flow requirements.

#### 4.1.1 Engagement Plan

The Study will require the Proponent to prepare an Engagement Plan to outline the approach to provide extensive public consultation. See Section 4.3 for further details.

#### 4.1.2 Quality Assurance and Quality Control

The Proponent shall be fully responsible for quality control of all services and deliverables rendered. The Proponent shall provide a Quality Assurance/Quality Control Plan outlining the Proponent’s relevant policies, including the process for quality control of work provided by the Proponent and its sub-consultants.

The City will monitor the budget, timelines and quality of work over the course of the Study for adherence to technical standards, value for money, and conformity with this R.F.P. scope of work, based on agreed upon quality objectives.

The City maintains the right to audit the Proponent’s compliance to the Quality Assurance/Quality Control Plan by reviewing the Proponent’s procedures at the offices of the Proponent. At any time, the City’s Project Manager may request clarification or additional information from the Proponent to confirm adherence with the Quality Assurance/Quality Control Plan. This includes access to all records in performing the Services (including inspection records, test results and testing facilities) and/or conducting sampling and direct observation of testing.

In some instances, the City may conduct an independent assessment of the Proponent’s work. The Proponent shall furnish all information requested by the City to carry out this review. If faulty work is discovered, the City may pursue cost recovery. The results of the assessment may impact the Proponent’s eligibility to perform future work for the City.

The Proponent shall agree to correct areas of non-conformance by a date specified by the City’s Project Manager, if, after written notice, the Proponent does not address the areas of concern, the City may stop work until conformance is demonstrated or appropriate revisions are approved. This is to ensure that any additional work to obtain conformance does not constitute a change of scope.

#### 4.1.3 Meetings

The Proponent may define an appropriate number of meetings, based on their experience with past similar projects; however, the minimum number of meetings to be included in the proposal are outlined in the table below:

Type of Meeting	Number of Meetings
Project Initiation Meeting	1

<b>Type of Meeting</b>	<b>Number of Meetings</b>
Project Start-up Meeting	1
Project Team Meetings	10
Technical Agency Committee	10
Public Information Centres	4
Economic and Development Services Committee	5
Advisory Committees of Council	10
Additional Meetings	2
<b>Total Number of Meetings</b>	<b>43</b>

The Proponent shall prepare an agenda and a copy of the documents and plans to be discussed at each meeting. These items shall be sent to the City a minimum of five (5) business days prior to the meeting.

The Proponent shall provide written minutes of all meetings to all parties within five (5) working days and shall address all issues on the basis of actions, information, and resolutions.

The Proponent shall also provide the City with a standard, per meeting fee, for all such meetings. This fee is to be shown on the summary page of the fee schedule.

#### **4.1.3.1 Project Initiation Meeting**

The Proponent shall hold **one (1) project initiation meeting** with the City’s Project Manager and other City staff to confirm the work program and project schedules provided in the proposal. Following the meeting, the Proponent shall update the work program and schedule to reflect any changes discussed and resubmit the documents to the City’s Project Manager for approval.

#### **4.1.3.2 Project Start-Up Meeting**

The Proponent shall hold **one (1) project start-up meeting** with the Technical Agency Committee to confirm a complete understanding of the proposed project and to obtain relevant background reports, maps, plans and other related information.

#### **4.1.3.3 Bi-weekly Teleconference Calls**

The Proponent shall allow for bi-weekly teleconference calls between the City’s Project Manager and the Proponent.

#### **4.1.3.4 Project Team Meetings**

The Project Team will consist of the City of Oshawa staff and the selected Proponent and their team and shall meet at least ten (10) times during the Study. Established at the outset of the study, the City’s Project Team will be representative of those City department

directly involved in the Study, including Engineering Services, Planning Services, and any other internal groups as required.

#### **4.1.3.5 Technical Agency Committee Meetings**

The Technical Agency Committee shall meet at least ten (10) times with the Project Team during the Study. No format for these meetings has been determined in order to allow the Proponent to provide input on an appropriate format.

#### **4.1.3.6 Economic and Development Services Committee Meetings**

For the purpose of this proposal, the Proponent shall plan and budget for at least five (5) presentations to the Economic and Development Services Committee and will include one prior to each of the four (4) P.I.C.s, and once prior to finalizing the Study.

The Proponent's Project Manager and additional staff (if required) are to deliver the presentation (maximum 10 minutes in length).

#### **4.1.3.7 Advisory Committees of Council**

For the purpose of this proposal, the Proponent shall plan and budget for at least five (5) presentations to each of the following advisory committees of Council:

- Oshawa Accessibility Advisory Committee;
- Oshawa Environmental Advisory Committee;

The presentations will be provided during the consultation period for each of the four (4) P.I.C.s, and once prior to finalizing the Study.

The Proponent's Project Manager and additional staff (if required) are to deliver the presentation (maximum 10 minutes in length).

#### **4.1.3.8 Additional Meetings**

The public consultation process is expected to be flexible and represents an enhancement of the requirements for compliance with the Municipal Class Environmental Assessment process. Additional opportunities for the general public to learn about the Study can be provided through other appropriate means, such as newsletters, website, etc. However, the Proponent shall be required to attend additional meetings to provide for more detailed consultation during the Study with other interested parties or directly affected agencies. The Proponent should allow for two (2) of such meetings.

#### **4.1.4 Progress Reports**

The Proponent shall prepare and submit progress reports at the end of each month and should include all milestone dates and deliverables. The progress report package shall be presented to the Project Team along with any invoice submissions and shall include, but may not necessarily be limited to:

- An Executive Summary: A brief overview of the project's status. It should be concise and provide a quick understanding of the project's progress.

- **Tasks Completed:** Detail the tasks that have been completed during the reporting period.
- **Tasks in Progress:** Provide information about the tasks currently being worked on and their progress.
- **Upcoming Tasks:** Outline the tasks that are planned for the next reporting period.
- **Issues and Risks:** Identify any issues or risks that have arisen, and how they are being managed or mitigated.
- **Budget Status:** Provide an update on the project’s financial status, including any variances from the original budget, cost performance index, or other key performance indicators.

## 4.2 Project Schedule

The Proponent shall note the following preliminary project schedule and milestone dates:

<b>Milestone Description</b>	<b>Milestone Date</b>
Project Initiation Meeting	October, 2024
Advertise Commencement of the Study	October, 2024
Public Information Centre Meeting 1	April, 2024
Public Information Centre Meeting 2	October, 2025
Public Information Centre Meeting 3	February, 2025
Public Information Centre Meeting 4	May, 2026
Finalization of Study Documentation/Notice of Study Completion	June, 2026

The City reserves the right to modify specified target dates of milestone for any reason without incurring any cost or liability for costs and damages incurred by the Proponent, including, without limitations, any expenses incurred in the preparation of the Proposal.

## 4.3 Community Consultation

The Study will encompass comprehensive community consultation, including interested parties and general public.

The Proponent will be responsible for ensuring that all affected identified parties are consulted and provided an opportunity for input.

A comprehensive mailing list of property owners, interested parties and local businesses should be developed and maintained by the Proponent.

Interested parties to be involved include, but may not necessarily be limited to:

- Advisory Committees of Council;
- Industry groups;
- Indigenous communities;

- Metrolinx;
- Region of Durham;
- Adjacent municipalities;
- Property owners; and,
- General public.

#### 4.3.1 Engagement Opportunities

Proponents are asked to define a community consultation program for the Study. Proponents should consider their experience with past similar projects when defining the consultation program; however, the minimum number of consultation events required in the proposal will be:

- (a) Survey/Feedback Form (to be developed by the Proponent in consultation with the City’s project lead and Corporate Communications);
- (b) Qs and As (to be developed by the Proponent in consultation with the City’s project lead and Corporate Communications); and,
- (c) At least four (4) Public Information Centres/Open House/Workshop (to be led by the Proponent and attended by the City project lead who will play an active role).

The Proponent will describe the following:

- The planned approach to communication with the identified parties throughout the Study; and,
- The expected timing and type of engagement for each identified parties.

Additional public consultation events proposed by the Proponent shall be considered a value added opportunity. The Proponent is asked to define the cost of additional consultation events (beyond those being proposed), should they be deemed necessary in the future.

**Note:** in person/virtual opportunities for engagement must be replicated as best as possible on the City’s community engagement website, Connect Oshawa.

The Proponent shall be responsible for:

- Preparing draft public notice and presentation materials in the City’s format;
- Distribution of the notices to identified groups upon review and approval by the City;
- Producing all display material (including drawings, maps, pictures and text boards as required) in advance of the meeting for the City’s review and approval;
- Setting up and operating the four (4) P.I.C.s including all display boards for public review at engagement opportunities. All P.I.C.s must be in person, subject to the health restrictions in place;

- Administering access to sign in and comment sheets at in person engagement opportunities;
- Summarizing all the comments and attendance from the P.I.C.s and determining in consultation with the City, which comments need to be addressed further. Prepare a summary report, which summarizes the attendance as well as both online and in-person comments and responses to the comments;
- Providing the final digital material to the City that meets the City’s accessibility standards for the City to post on its websites; and,
- Satisfying the Municipal Freedom of Information and Protection of Privacy Act requirements for the above.

Materials and presentations must meet the City’s accessibility standards.

The Proponent will be expected to lead the public engagement activities. City staff project leads will play an active role and will be in attendance.

#### **4.3.2 Available City Resources**

Consultation methods selected must be made available in-person, as well as online on the City’s community engagement website, Connect Oshawa (<https://connectoshawa.ca/>). The Proponent will work with the City’s Corporate Communications branch to best duplicate engagement opportunities in these two realms, with Corporate Communications staff responsible for the posting of the final consultation materials (e.g. survey/feedback form, background documents that are provided by the vendor as accessible P.D.F.s, etc.) on the Connect Oshawa website and providing results to the vendor.

The City’s Corporate Communications branch will use the draft public notice and survey/feedback form as developed by the Proponent to issue public communications, including but not limited to:

- Digital advertisement
- Connect Oshawa webpage
- Survey/Feedback Forms
  - Online on Connect Oshawa <https://connectoshawa.ca/>
  - Paper version for those who require an accessible format
- E-newsletters
- Social media messages

The City will also provide staff assistance with:

- Logistics for community consultation and communications;
- Booking the venue(s), including any necessary payment;
- City brand and graphic collateral for the Study (to be used in any communication); and,
- Sign-in sheets and paper engagement opportunities (e.g. surveys/feedback forms, etc.).

**Note:** Online engagement opportunities will run for a minimum of four (4) weeks.

### **4.3.3 Disclosure/Retention of Records**

Only cumulative results will be published/presented and written documents or presentations will not contain any information that is personally identifiable.

### **4.3.4 Survey/Feedback Form and Questions and Answers**

The proponent shall be responsible for providing content for a survey/feedback form to the public as described in Task 1.3. The proponent will work with the City's staff lead(s) and the City's Corporate Communications branch to finalize content and ensure consistency with City's community engagement documents.

The public should be given background information on the Study. Community members should then be given the opportunity fill out the survey/feedback form as well as provide comments.

The survey/feedback form will be delivered online through the Connect Oshawa webpage. The survey/feedback form will also be available on paper at the Service Oshawa counter at City Hall, the P.I.C. and any additional proposed public consultation events that fall within the survey/feedback form's lifecycle.

In addition, the Proponent is to develop Questions and Answers in consultation with the City project lead and Corporate Communications. The Questions and Answers will be available online through the Connect Oshawa webpage and used for social media responses and the in-person/virtual engagement opportunities.

### **4.3.5 Public Information Centres**

The Proponent shall be responsible for coordinating and presenting a minimum of four (4) P.I.C.s both in-person or replicated virtually. For the virtual P.I.C., the Proponent is to provide details on the format and technology that will be used (e.g. Microsoft Teams) to deliver the virtual engagement opportunity.

For all consultation events, the Proponent will be responsible for supplying event display boards and other materials to be presented. The Proponent will be responsible for providing any materials available for viewing or used in a presentation in an accessible, digital format to be featured on Connect Oshawa.

The City shall be responsible for the coordinating and arranging the venue, and distribution of the public notice and public communications, including advertisements.

### **4.3.6 Technical Agency Committee**

A Technical Agency Committee shall be established at the outset of the study. The Technical Agency Committee shall be representative of the City, Region of Durham, adjacent municipalities, Metrolinx, Central Lake Ontario Conservation Authority, as well as regulatory agencies, Ministries, etc., who may be affected by the Study. The purpose of the committee is to involve affected technical agencies, in an in-depth manner, as the Study progresses. It shall be geared for those with specific interests, agencies and/or Ministries that may be affected.

### **4.3.7 Indigenous Consultation**

The City is committed to proactively identifying and addressing potential impacts of the Study on the interest and rights of interested Indigenous communities within, and in proximity to, the City. The duty to consult with Indigenous communities is triggered when a proponent contemplates decisions or actions that may adversely impact asserted or established Indigenous or treaty rights.

The key goals and objectives of consulting with Indigenous communities are to:

- In consultation with Ministry of the Environment, Conservation and Parks, identify potentially interested Indigenous communities based on their rights and potential association with the Study;
- Identify aspects of the Study that potentially affect Indigenous interests;
- Provide meaningful opportunities for the early involvement of Indigenous communities in order to support their continued participation through all stages of the Study;
- Provide timely, accurate and easy to understand information to Indigenous communities about the Study in a consistent and transparent manner; and,
- Track and document all engagement activities and communications to ensure all comments and questions are considered throughout the Study.

The Proponent shall make initial notification through the Notice of Study Commencement and accompanying introduction letter. Notices shall be sent to the Chiefs and Council of local First Nations and Métis communities. The initial notice and letter shall include a City contact, statement of the nature of the Study, brief synopsis of the details of the Study (including a map), a description of any processes, activities or limitations associated with the Study and a request for the Indigenous community to identify representatives who are appropriate contacts for future communications.

### **4.4 Deliverables**

The Proponent is required, at a minimum, to address the activities and tasks described under Section 2.0, including producing the following deliverables:

- Project Management Plan outlining the proposed approach to managing the Study;
- Engagement Plan;
- Quality Assurance/Quality Control Plan;
- Progress Reports
- Public Notices;
- Various Discussion Papers;
- Draft Integrated Transportation Master Plan;
- Draft Active Transportation Master Plan;
- Public Information Centre Materials;
- Comment and Response Tables for all comments received on all Study deliverables;
- Final Integrated Transportation Master Plan; and,
- Final Active Transportation Master Plan.

The Proponent shall provide two (2) printed copies of the draft and eight (8) printed copies of all final reports.

In addition the deliverables listed above, the Proponent is required to produce the following deliverables specific to each phase of the Study.

### **Phase 1: Study Initiation, Background Review, Problem or Opportunity Statement**

- A Data Gaps Summary memo.
- A Discussion Paper detailing the outcomes of the 2015 I.T.M.P. and A.T.M.P.
- A Discussion Paper reporting on the results of the public opinion survey/feedback form.
- A Best Practices Discussion Paper.
- A Discussion Paper documenting the vision, goals, principles, alternative transportation scenarios and assessment criteria.
- A Discussion Paper that summarize the results of the P.I.C. Number 1.

### **Phase 2: Assessment of Alternatives and identification of Preferred Transportation Scenario**

- A Discussion Paper documenting the modelling assumptions, process and results.
- Model databanks, electronic files and run streams for each of the modelled alternatives.
- A Discussion Paper documenting the assessment of each alternative transportation scenario.
- A Discussion Paper documenting the selection of a preferred transportation scenario and a list of actions to implement the preferred transportation scenario.
- A Discussion Paper that summarize the results of the P.I.C. Number 2.

### **Phase 3: Development of Supporting Strategies**

- A Discussion Paper that documents a comprehensive Active Transportation Strategy.
- City Official Plan policy directions supporting active transportation and pedestrian oriented development.
- A Discussion Paper that documents a comprehensive T.D.M. Strategy.
- Oshawa Official Plan policy directions supporting T.D.M.
- A Discussion Paper that documents the recommended arterial and collector road network.

- Oshawa Official Plan policy directions supporting delivery of the recommended arterial road and collector road network.
- A Technical Appendix documenting the assessment process, recommendations and preliminary road improvements program.
- A Discussion Paper that documents the recommendations to address identified gaps and opportunities in the existing and proposed transit network.
- City Official Plan policy directions supporting increased transit service.
- A Discussion Paper that documents a comprehensive Complete Street Design Guidelines and Strategy.
- Oshawa Official Plan policy directions supporting complete street Design.
- A Discussion Paper that documents the Economic Development and Goods Movement Strategy.
- Oshawa Official Plan policy directions supporting curbside management and goods movement.
- A Discussion Paper that documents the Transportation Data Collection Strategy.
- A Discussion Paper that consolidates and documents the recommended strategies and networks for active transportation, roads, transit, and economic development and goods movement as well as the recommended T.D.M. strategy and the transportation data collection strategy.
- A Discussion Paper that summarize the results of the P.I.C. Number 3.

#### **Phase 4: Preparation of the Integrated Transportation Master Plan**

- A Discussion Paper that documents the I.T.M.P. and A.T.M.P. costing and risk management of implementation.
- A Discussion Paper that documents the Implementation and Monitoring Plans for the recommended I.T.M.P. and A.T.M.P.
- A capital program priority setting process.
- A Discussion Paper that summarize the results of the P.I.C. Number 4.

### **5.0 Fee Structure**

Proponents shall fully describe their proposed fee structure, including completion of the Schedule of Prices, submitted through the City’s Bidding System, if required as part of the R.F.P. Proponents must clearly identify any additional charges that may be applicable that have not already been addressed in their proposal.

## 6.0 Mandatory Requirements

Proponents must demonstrate the ability to meet the following mandatory requirements. Failure to meet the mandatory requirements may result in the submission being rejected.

1. Proponents shall provide at least three (3) examples of similar work within the past five (5) years, preferably with municipalities or broader public sector organizations.
2. A statement that clearly identifies there are no conflicts of interest with respect to other clients in the area.
3. Proponents shall provide complete biographies (curricula vitae) of your management team, highlighting years and range of experience relevant to the activities anticipated by this R.F.P. The primary contact (contract manager) is to be clearly identified as the single point of contact for the City.
4. Proponents will ensure all print and electronic material identified as deliverables will be created using an Arial or Verdana font in a minimum point size of 12. There will be a statement at the beginning or end of the document which reads “If this information is required in an accessible format please contact, (name, phone number and email of proponent). Proponent will be responsible to supply all accessible formats if requested at no additional cost to the City of Oshawa and/or requestor.

Proponents will ensure all digital products identified as deliverables will be in an accessible format as outlined in the Accessibility for Ontarians with Disabilities Act, 2005 Integrated Accessibility Standards Regulation – Ontario Regulation 191/11 conforming to the World Wide Web Consortium’s web Content Accessibility Guidelines (W.C.A.G.) 2.0 Level AA.

Should public meeting accessibility accommodations be requested they will be supplied by the Proponents at no additional cost to the City of Oshawa and/or requestor. Proponents will ensure all PowerPoint presentations used in public meetings or presentations will conform to the City of Oshawa Formatting Tips for Accessible PowerPoint Presentations.

Proponent should visit the City of Oshawa, [Purchasing website](#) for resources on ensuring compliance with the City’s Accessible Standards. Information is located on the website under the Accessible procurement heading.

## 7.0 Evaluation Criteria

Proposals will be evaluated on the basis of all information provided by the Proponents. Each Proposal will be reviewed to determine if the proposal is responsive to the submission requirement outlined in the R.F.P.

Proposals submitted, shall be evaluated using the criteria listed below. Criteria are weighted in accordance with their importance and relevance to the City’s operations and objectives.

The City reserves the right to “short-list” several of the highest ranking proponents prior to the final selection in order to conduct interviews/presentations. In the event that interviews/presentations take place, the short-listed Vendors’ proposal will be evaluated based on the accumulated total from both the Submission and Presentation weighted scores.

<b>Evaluation Criteria</b>	<b>Available Points</b>
Qualification and Experience (demonstrated experience of firm, key personnel, similar project in both scope and value)	20 Points
Quality of Proposal (responsiveness and completeness of submission, demonstrated willingness to comply with the terms of the R.F.P.)	10 Points
Project Deliverables and Technical Response (demonstrated understanding of the requirements; quality and completeness of approach, work plan, and methodology; project management structure; ability to provide necessary resources to meet milestone dates and deadlines)	40 Points
Pricing (cost effectiveness of the proposal)	30 Points
Total	100 Points
Interview/Presentation (if required)	25 Points
<b>Grand Total</b>	<b>125 Points</b>

## 8.0 City General Requirements

### 8.1 Invoices

All invoices must be submitted electronically to [accountspayable@oshawa.ca](mailto:accountspayable@oshawa.ca) or mailed directly to Accounts Payable, City of Oshawa, 50 Centre Street South, Oshawa, L1H 3Z7.

Invoices must show:

- Purchase order number
- City item Number (if applicable)
- Description of goods or services provided as referenced on the purchase order
- Itemized by goods, materials or services provided
- City staff contact name

Invoices must be submitted within 30 days of goods received by the City or services provided to the City.

Failure to submit the invoice as listed above may result in your invoice being returned and resubmitted correctly.

## **8.2 Purchase Order**

The successful bidder will receive one Purchase Order to cover the work.

Prior to invoicing the City, the Consultant/Contractor must send an email to the Project Manager with the work that has been completed (and any other necessary paperwork that is required for the project) and the dollar amount associated with that work.

The Project Manager must email approval to proceed with an invoice, once approved, an invoice can be submitted.

The invoice must include a purchase order and include the information as stated in Section 8.1 Invoices.