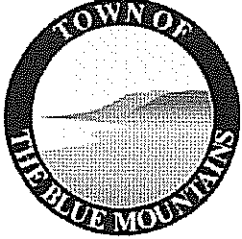


STAFF REPORT:



REPORT TO: Planning and Building
Committee
MEETING DATE: May 4, 2009
REPORT NO.: SPS.09.02
SUBJECT: Housing Needs Study
PREPARED BY: Peter Tollefsen, Director of
Special Projects (Sustainability)

A. Recommendations

THAT Council receive Staff Report SPC.09.02 Housing Needs Study for information purposes;

AND THAT Council appoint _____ to be a member of the Housing Needs Study Steering Committee as well as assist staff with the RFP consultant evaluation/selection process.

B. Background

A Joint Council meeting was held June 5, 2008 between the Towns of Collingwood and The Blue Mountains to discuss affordable housing ideas and suggestions. Town staff indicated that one way to provide attainable housing is to put policy in the Official Plan requiring developers to provide a portion of their development as part of a new application. Necessary studies are required to justify such official plan amendments and it was indicated that a request would be brought forward in the 2009 budget process.

A Proposed Operating Project form was submitted for a Housing Needs Study. The purpose of this Study would be to evaluate the current housing situation in The Blue Mountains and recommend policy and program directions to address identified housing needs. This proposed Project item was part of the final Budget package approved by Council in March, 2009.

Staff are preparing the Request For Proposals (RFP) for circulation to consulting firms. Also being prepared are the Terms of Reference for the Housing Needs Study a copy of which is attached for the Committee's information.

Section 2 Scope of Work under Meetings mentions the work of a Project Team and a Steering Committee. It is requested that a member of Council be on the Steering Committee as well as assist staff with the Evaluation of RFP's and consultant selection process. The Evaluation and Consultant Selection process would likely take 2 meetings. The Steering Committee would consist of 4 meetings over the next 7 months.

C. The Blue Mountains' Strategic Plan

The Housing Needs Study is aligned with the goal of – *Managing growth to ensure the ongoing health and prosperity of the Community.*

D. Environmental Impacts

Not measurable at this point

E. Budget Impact

As part of the approved 2009 Town Budget resources of \$50,000. was assigned to the Operating Project budget for a Housing Needs Study.

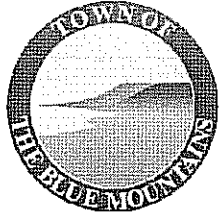
F. Attached

Terms of Reference – Housing Needs Study, revised Draft April 29, 2009.

Respectfully submitted,

Signature

For more information, please contact:
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Tel 519 599 3131 ext 247
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revised DRAFT April 29, 2009.

**Town of The Blue Mountains
HOUSING NEEDS STUDY
TERMS OF REFERENCE
RFP NO. TBM-__2009-_____**

1. Background:

The Town of The Blue Mountains lies on the southern shores of Georgian Bay and is Ontario's only designated four-season recreation area. This popular and scenic Town is a blend of quiet rural areas, ski resorts, beaches, Intrawest Village, an excellent harbour and varied small rural centres. The Blue Mountains is a municipal corporation formed by the amalgamation of the former Town of Thornbury and the Township of Collingwood on January 1, 1998. The Blue Mountains is proud to present a variety of recreation events throughout the year to complement all four seasons. Approximately 50% of the Town is contained within the Niagara Escarpment, a world biosphere reserve. The Town also contains part of the Pretty River Provincial Park.

The *2006 Census* reported that population of the Town as 6,825 permanent residents but this increases to approximately 16,000 including non-permanent residents. A busy winter weekend can see the population in The Blue Mountains increase to almost 40,000 residents and visitors.

The economy of the Town was originally based on agriculture and in particular, apples. While the agricultural industry is still important, tourism has become the economic mainstay of the Town with 600,000+ visitors during the winter season as well as summer recreational activities.

The Town is working on an ambitious long-term development strategy that provides a **Path** towards a "**sustainable** community", by way of an overarching Integrated Community Sustainability Plan that will outline the objectives, goals and actions for different facets of the community. Running concurrently are similar sustainability projects such as an Economic Development Strategy, a Community Improvement Plan, Municipal Cultural Plan and an Official Plan review.

The Town has an Affordable Housing Committee. A Housing Needs Assessment was done for the municipalities of The Blue Mountains and Collingwood in April 2005, by Ryerson University. An Affordable Housing Visioning Session was held June 2, 2006, with the community followed by a Report. A Business Plan was prepared by Tim Welch Consultant Inc. in August 2007, addressing the need for affordable housing.

The Town is moving forward with Smart Growth principals and as such is interested in having them incorporated in all studies underway, including the Housing Needs Study. Smart Growth applies sustainable development principals to areas of municipalities which traditionally have been developed using low density, non affordable, discontinuous, auto-dependent and single use development strategies. Sustainable development means development with the goal of preserving environmental quality, natural resources and liveability for present and future generations.

The County of Grey has completed a five-year review of their Official Plan. Adopted March 6, 2009, the new Plan contains a Housing Policy to encourage a wide variety of housing by type, size and tenure to meet projected demographic and market requirements of current and future residents of the County. The Town's Official Plan must be amended to conform to the County Official Plan once it is approved by the Province.

By "Attainable" Housing it is general meant the production of smaller units and higher densities to provide a variety of housing stock giving the option of lower cost units on the market.

By "Affordable" Housing it is general meant the definition in the PPS which often includes the subsidy of housing units through some government program.

Our **VISION** is to have a sustainable community in 25 years that has a healthy mix and range of housing types, integrated throughout the municipality and not concentrated in specific areas, to provide opportunities for all income levels for accessibility to attainable/affordable housing.

2. Scope of Work:

An outline of the scope of work for this project is described below. It is not considered all inclusive and should be augmented as required, and believed necessary, based upon the consultant's experience and knowledge.

Purpose:

The purpose of this project is to identify a housing profile of the community 25 years from now and provide an action plan on how to ensure our vision of a thriving fully developed sustainable community as envisaged by the Official Plan with a population of approximately 30,000.

Study Details:

**HOUSING NEEDS STUDY – REQUEST FOR PROPOSAL
THE BLUE MOUNTAINS
RFP NO. TBM-_____**

To evaluate the current housing situation in the Town, identify the housing needs and recommend a range of policies, programs and strategies that would help build a sustainable community with a broad range of housing stock.

The **objectives** of the study will be to evaluate the full continuum of housing needs within the Town, identify any current and/or anticipated gaps or shortfalls in meeting these needs and recommend policies and programs for addressing identified issues and concerns. This will be achieved by quantifying supply and demand, identifying housing issues relevant to different populations within the Town, identifying impediments to the provision of affordable/attainable housing, identifying public and private sector opportunities to provide housing to meet the current and future requirements of local residents and developing recommendations relating to policy and programs to address the identified future needs.

The Study will prepare a "Sustainability Model" with the required future mix of housing ranges and densities. These ranges will be used as targets to ensure, with annual housing reviews, our housing mix is on track for a sustainable community.

The Study will place a particular emphasis on reviewing the Town's Official Plan to determine how changes should be made to existing policies contained within the Plan, including such potential policies as requiring a developer to have a percentage of a new subdivision for affordable/attainable housing and to ensure any changes support the policies contained within the County of Grey Official Plan.

To meet study objectives, certain key elements will need to be considered:

- Strong emphasis on futurist thinking;
- Housing Demand;
- Housing Supply;
- Impediments and Opportunities; and
- New Policies and Programs, including those that support the Provincial Policy Statement (PPS).

Meetings:

There will be a Project Team consisting of Town staff and a Steering Committee consisting of members of the Community and Council.

Commencement of the Study:

-kick off meeting with the Project Team and Steering Committee.

Preparation of a draft Demand and Supply Analysis Report and a Sustainability Model:

-meeting to make comments with the Project Team and Steering Committee.

-presentation to Council

-Public Workshop#1.

Preparation of final Demand and Supply Analysis Report.

Preparation of the draft Recommendations on new Policies and Programs (including identification of opportunities and impediments):

- meeting with the Project Team and Steering Committee
- Public Workshop #2

Preparation of the final Recommendation on new Policies and Programs.

Preparation of the draft Housing Study:

- presentation to the Project Team and Steering Committee
- presentation to Council (public invited) public Meeting format

Finalize the Housing Needs Study, submission to Town.

Council – final approval.

(4 meetings with the Project Team and the Steering Committee, 2 public workshops and 3 meetings with Council consultant to attend)

Public Consultation:

The consultant will be required to develop and implementation of a clear, concise, transparent and responsive public consultation plan including, but not limited to:

- Conduct 2 Public Workshops and 1 Public Meeting.
- Assist the Town with the development of a Housing Needs Study project Web site which will be part of the Town's overall Web page. This Web site will include information pertaining to the Study with updates and provide the ability of citizens to give input.

Deliverables:

The following list of deliverables shall be included as a minimum in carrying out this review.

- Prepare a detailed work program to the satisfaction of the Town, including the costs required to complete all aspects of the project.
- Prepare a detailed communications plan to the satisfaction of the Town.
- Provide information to develop and maintain the Town's Housing Needs Study project Web site area established on the Town's Web site during the duration of the project.
- Assist with the preparation of public meeting notices, meeting agendas and minutes of meetings.
- draft Demand and Supply Analysis report and a Sustainability Model-10 copies
- final Demand and Supply Analysis report and a Sustainability Model -15 copies
- Presentation slides summarizing demand and Supply Analysis-1set
- Draft Recommendations on new Policies and Programs (including identification of opportunities and impediments)-10 copies

- Final recommendations on new policies and programs incorporated into a complete draft Housing Needs Study document-10 copies
- Presentation slides summarizing Final Recommendations
- Final Housing Needs Study-20 copies.
- 1 electronic copy of all reports in MS Word or MS Power Point format.

Project Management/Work Plan:

The Town Project Manager of the Housing Needs Study is the Director of Special Projects(Sustainability).

The consultant is expected to actively manage the project and is responsible to ensure the project is completed in a timely manner and within budget. Any costs incurred related to project management must be specifically indentified and distributed across the various tasks in the project. A summary of the tasks to be undertaken within this task are, but not limited to, the following:

- Coordinate the activities of the project lead and project team members.
- Provide regular updates to the Town Project Manager on the status of the project.
- Develop, maintain and distribute a project schedule and work plan including, but not limited to:
 - detailed work plan schedule for distribution at project initiation meeting;
 - up-to-date work plan schedule at all Town Project Team Meetings;
 - timing of start and duration of all tasks including deliverables, milestones and scheduled Town Project Team meetings; and
 - allowances of two to three weeks for the review of submitted material by the Town's Project Team depending on the detail involved.
- Arrange, schedule and conduct bi-monthly Town Project Team Meetings including, but not limited to:
 - prepare an agenda within seven (7) business days of the meeting and submitting it to the Town Project Manager for circulation;
 - discussion of project schedule; and
 - prepare minutes of project meetings between the consultant and Town staff which shall be submitted to the Town Project Manager within seven (7) business days of the meeting for circulation.
- Provide regular updates and pertinent reports to be posted on the Town's dedicated Housing Needs Study Project Web site.
- Prepare and submit together, invoices and progress reports to the Town's satisfaction.

Schedule:

The Town expects the work to be completed within a ____6____ month timeframe.

3. Submissions:

Submissions of the above proposal should be based on the above steps. Proposals should comment on the scope as outlined above and whether variation is considered appropriate

based on experience and expertise. It is expected that the final terms of reference will be agreed upon prior to the study's commencement. The study will be based on the prescribed methodology and be defensible before the Ontario Municipal Board.

Proposals must outline the costs and the schedule required to complete the Housing Needs Study along with a work plan and target dates. The budget should include all work and revisions that may be required as a result of input at the public open houses and the public meeting with Council.

The Proposal must be submitted in securely sealed packaging with the Town-provided envelope affixed to the top of the package should the proposals not fit in the envelope.

Ten (10) copies of the Technical Proposal must be provided in securely sealed packaging with the Town-provided envelope affixed to the top of the package, should the proposals not fit in the envelope. One (1) copy of the Fee Proposal shall be submitted in a separate sealed envelope as provided by the Town with this proposal.

Both the Technical Proposal and Fee Proposal must be submitted to the Town at the same time. **Technical proposals and Fee Proposals shall be sealed separately within courier packaging. The courier packaging shall indicate delivery to the Office of the Clerk.**

No reference to fees shall be included in the technical proposal. Any reference to fees in the technical proposal shall result in the proposal submission being disqualified.

Proposals must be received and time-stamped by the Office of the Town Clerk of the Town of The Blue Mountains at the Town office located on the **1st floor** of the Municipal Building, 26 Bridge Street East, Box 310, Thornbury, Ontario, NOH 2P0, on or before the Proposal Deadline Time which shall be **2:00 p.m., LOCAL TIME, _____, _____**. In the event of a discrepancy, The Blue Mountains time stamp device shall be the standard of measurement.

It is requested that final text and all mapping outputs be provided in an electronic format compatible with the Town's GIS.

4. Submission Requirements:

The proposals shall include all of the following:

Form of Proposal:

The *Form of Proposal Page* (attached in Appendix B) is to be submitted as one hardcopy original with original signatures. The form of proposal shall be submitted in the Technical Proposal envelope on or before the proposal deadline of _____, at 2:00 p.m., LOCAL TIME.