



The Corporation of the Municipality of Whitestone

**Agenda of Special Council Meeting
Friday November 1, 2024, 2024, 3:00 p.m.**

Join Zoom Meeting **(Video)**

<https://us02web.zoom.us/j/87388082260>

(Phone Call Only)

Dial [+1 647 558 0588](tel:+16475580588) then Enter Meeting ID: 873 8808 2260#

*Every effort is made to record meetings with the exception of the Closed Session matters.
Both the audio and video are posted on the Municipal Website.
The written minutes are the official record of the meeting.*

-
1. **Call to Order and Roll Call** **3:00 p.m.**
 2. **Disclosure of Pecuniary Interest**
 3. **Approval of Agenda ®**
 4. **Presentations and Delegations**
 - 4.1 Proponents presentations in respect of RFP 2024-09, Official Plan Five Year Review and Comprehensive Zoning By-law Update
 - 4.1.1 J.L Richards – David Welwood
 - 4.1.2 MHBC – Jamie Robinson
 - Adjourn to Closed Session ®**
 5. **Closed Session**
 - 5.1 A trade secret or scientific, technical, commercial, financial or labour relations information, supplied in confidence to the municipality or local board, which, if disclosed, could reasonably be expected to prejudice significantly the competitive position or interfere significantly with the contractual or other negotiations of a person, group of persons, or organization pursuant to Ontario Municipal Act, Section 239(2)(i)

- Proponents presentations in respect of RFP 2024-09, Official Plan Five Year Review and Comprehensive Zoning By-law Update:
Financial details only

5.1.1 J.L Richards – David Welwood

5.1.2 MHBC – Jamie Robinson

Reconvene into Regular Meeting ®

6. **Contract Award**
RFP 2024-09 Official Plan Five Year Review and Comprehensive Zoning By-law Update ®
7. **Confirming By-law ®**
8. **Adjournment ®**



Municipality of Whitestone

Report to Council

Prepared for: Council

Department: Planning Services

Agenda Date: October 15, 2024

Report No: PLN-2024-04

Subject:

Request for Proposal (RFP) 2024-09 – Official Plan Five Year Review and Comprehensive Zoning By-law update

Recommendation:

THAT the Council of the Municipality of Whitestone receives for information Report PLN-2024-04 (RFP 2024-09 – Official Plan Five Year Review and Comprehensive Zoning By-law update); and

THAT the Council of the Municipality of Whitestone provide direction in respect of either awarding the contract or giving consideration to having presentations made to Council by the proponents.

Background:

RFP 2024-09 – Official Plan Five Year Review and Comprehensive Zoning By-law update was released August 9, 2024 with a closing time/date of 3:00 p.m. Thursday, September 5, 2024.

Seven (7) Planning Consultant firms were invited to submit a proposal. The Request for Proposal was also posted on the Municipal website.

The scope of the Request for Proposal (RFP) indicates that the Municipality of Whitestone is seeking land use planning consultants to undertake a comprehensive review of the Whitestone Official Plan, and Comprehensive Zoning By-law update.

The primary objectives of the project are:

- 1) To complete a comprehensive review of the Municipality's Official Plan that is consistent with the Provincial Policy Statement, the *Planning Act* and any other regulatory requirements;
- 2) To update a Comprehensive Zoning By-law that responds to the changing nature of development in the Municipality of Whitestone, and to ensure conformity with the updated official plan in accordance with the *Planning Act*.

From the RFP document:

The following is an overview of the minimum scope of work that should be the focus of submitted proposals. Proponents may offer a work program that goes beyond these minimum elements.

- Address and issues and inconsistencies with the existing Official Plan
- Review and refinement of the population projections
- Examination of residential growth strategies in the Settlement Areas
- Review and enhancement of the natural environment policies
- Development of Green House Gas reduction and Climate Change strategies
- Promotion of Whitestone as a livable, four season community.
- Ensure that the Municipality's Asset Management Plan is considered and reflected in the new policy framework
- Review and enhancement of the Official Plan schedules
- Review of policies related to the Landfill Impact Area
- Review of lake specific policies

It is anticipated that proposals will include the following broad elements in the work program:

Official Plan Review:

1. Project start up with staff and Council briefing
2. Pre-consultation: Ministry of Municipal Affairs and Housing
3. Research leading to technical review, policy support, studies, and reports
4. Community and Stakeholder Consultation including lake and road associations
5. Policy development and review
6. Adoption by Council
7. Submission to the Ministry of Municipal Affairs and Housing

Comprehensive Zoning By-law Update:

1. Assess the existing Zoning By-law and the amendments approved to date
2. Ensure compliance and alignment of the proposed Zoning By-law with the new Official Plan
3. Receive staff input on the existing documents/noted areas requiring clarification / definition
4. Complete a detailed analysis of the Municipality's zoning provisions
5. Amend zoning provisions and make recommendations regarding issues and/or problem areas
6. Community and Stakeholder Consultation including lake and road associations
7. Consolidate all amendments into one comprehensive document
8. Adoption by Council

Analysis:

Request for Proposals

Two proposals were submitted in response to the RFP, with no late submissions. The proposals were analyzed for conformity with the RFP requirements and evaluation criteria, which were outlined in the RFP. These criteria provided a focus on the review of each respondent’s understanding of the project, work plan and schedule, project team composition and experience with similar projects, references, and costs.

Costs

		JL RICHARDS & ASSOCIATES LIMITED excluding HST	MHBC excluding HST
1	Official Plan Update (November 2024 to December 2025)	\$ 85,410.50	\$ 67,256.25
2	Zoning By-law Update (January 2026 to December 2026)	\$ 36,539.00	\$ 64,518.00
	TOTAL	\$ 121,949.50	\$ 128,774.25

The project start time line for both proposals is November 2024.

The proposals were reviewed and evaluated based on the criteria outlined in the RFP. Both proposals are strong and demonstrated their experience, ability to successfully complete the project, understanding of official local land use planning, community context with respect to the social, cultural, economic, and environmental characteristics and dynamics of Whitestone. In-depth public consultation, creativity and awareness of best practices, as well as a realistic sense of project timing based on experience were also considerations.

Financial Considerations:

The 2024 Capital Budget provides for the following:

19-115 Official Plan - Consultants	20,000
19-116 Lake Planning Initiatives	5,000

Next Steps:

Due the significance and magnitude of this important, two-year project, Council may want to consider that both proponents make a presentation to Council to discuss their proposal, their approach and the work plan.

Link to Strategic Plan:

8.1 Update Official Plan and Zoning By-law

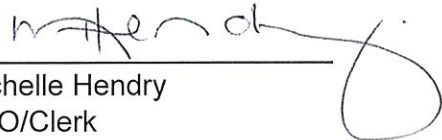
The Municipality will undertake a comprehensive review and update of the 2016 Official Plan and the 2018 Zoning By-law.

Respectfully submitted by:



Paula Macri
Planning Assistant

Reviewed by:



Michelle Hendry
CAO/Clerk

ATTACHMENTS:

1. Proposal from J.L Richards & Associates Limited
2. Proposal from MHBC Planning Limited



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Dunchurch, Ontario P0A 1G0
Phone: 705-389-2466 Fax: 705-389-1855

www.whitestone.ca
E-mail: info@whitestone.ca

Resolution No. 2024-399

Moved by: Councillor Nash

Seconded by: Councillor Bray

- 9.1 Report PLN-2024-04
Request for Proposal (RFP) 2024-09 – Official Plan Five Year Review and Comprehensive Zoning By-law update

THAT the Council of the Municipality of Whitestone receives for information Report PLN-2024-04 (RFP 2024-09 – Official Plan Five Year Review and Comprehensive Zoning By-law update); and

THAT the Council of the Municipality of Whitestone provide direction to having presentations made to Council by the proponents in a future council meeting.

Recorded vote as per Section 3.20, Procedural By-law 80-2023:

		YEAS	NAYS	ABSTAIN
Councillor	Woods	X		
Mayor	Comrie	X		
Councillor	Bray	X		
Councillor	Nash	X		
Deputy Mayor	Joe Lamb	X		

Carried

Attachment 1

Request for Proposal #2024-09

September 5, 2024
JLR No.: 33316-000

Prepared for:
**THE CORPORATION OF THE MUNICIPALITY OF
WHITESTONE**
21 Church Street
Dunchurch, ON P0A 1G0

Attention:
Michelle Hendry, CAO/Clerk

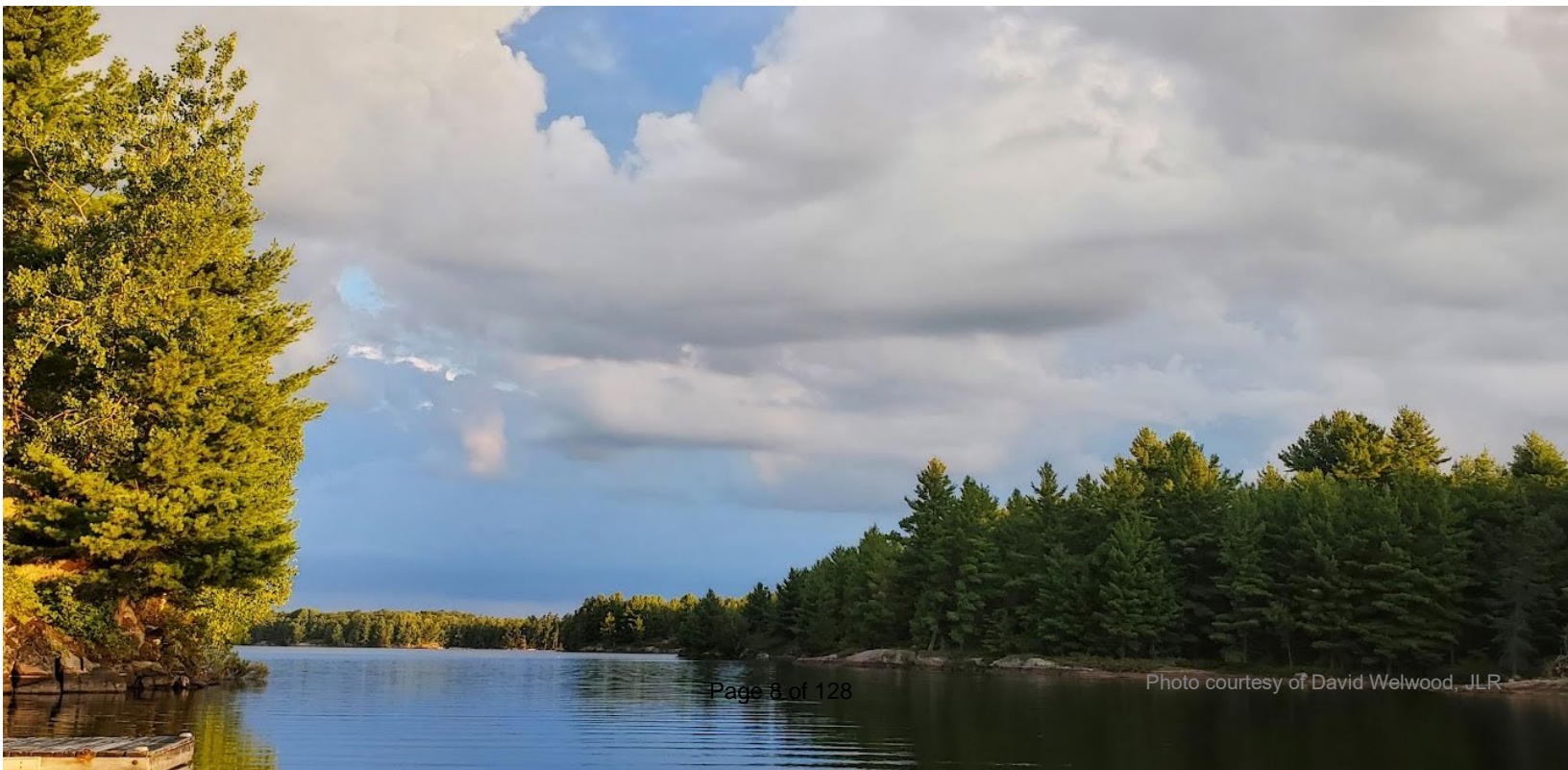
Paula Macri
Planning Assistant

Prepared by:
**J.L. RICHARDS & ASSOCIATES
LIMITED**
314 Countryside Drive
Sudbury ON P3E 6G2

Contact:
David Welwood, MES, RPP, MCIP
Project Manager
705-806-1440
dwelwood@jlrichards.ca

Municipality of Whitestone

To undertake a Five-Year Review and Update of the Municipality's Official Plan and Zoning By-law



September 5, 2024

Attn: Michelle Hendry, CAO/Clerk
Attn: Paula Macri, Planning Assistant

21 Church Street
Dunchurch, ON P0A 1G0



**Re: The Corporation of the Municipality of Whitestone, RFP # 2024-09
Five-Year Review and Update to the Municipality's Official Plan and
Comprehensive Zoning By-law**

Dear Michelle Hendry and Paula Macri,

J.L. Richards & Associates Limited (JLR) is pleased to submit our response to the Corporation of the Municipality of Whitestone's (the Municipality) request for proposal to undertake a five-year review and update to the Municipality's Official Plan and Zoning By-law.

Founded in 1955 and now employing approximately 400 people, JLR is a proudly Canadian, employee-owned firm of planners, architects, and engineers with seven offices throughout Ontario, including our Sudbury office where the bulk of the work for this project will occur. We have developed relationships with numerous municipal clients throughout Ontario, including in neighbouring municipalities in Parry Sound District. The Project Manager proposed for this project was born in Parry Sound, regularly travels to the area and is highly familiar with Whitestone and its planning context. In addition, we have completed several Official Plan and Zoning By-law reviews for municipal clients of similar size and composition to the Municipality.

We pride ourselves on staying current with changes to planning and other municipal legislation, such as Bills 97, 108, 109, 23 and 185. Our team is especially skilled in serving the planning needs of rural, northern, and small urban communities. Furthermore, JLR regularly provides advice to clients on legislation, such as the Municipal Act, Heritage Act, Aggregate Resources Act, and initiatives and requirements of different provincial ministries. We also sit on committees such as the Rural Ontario Municipal Association's Attainable and Affordable Housing Task Force to lend perspective on the removal of barriers to attainable and purpose-built affordable rental housing. JLR is experienced in the development of land use planning policy and regulation, and has prepared numerous official plans, zoning by-laws, five-year reviews, community improvement plans, special planning studies and municipal by-laws across Ontario.

Thank you for the opportunity to submit this proposal. We are very interested in working with the Municipality and are confident that you will find we have provided a competitive fee based on our established Work Plan. If you have any questions or require clarification on any aspect of our proposal, please contact the undersigned directly.

Sincerely,

David Welwood, MES, RPP, MCIP
Senior Planner, Project Manager
705-806-1440
dwelwood@jlrichards.ca

Jason Ferrigan, RPP, MCIP
Principal Associate, Chief Planner
705-806-4422
jferrigan@jlrichards.ca



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- + Submission Form
- + Curricula Vitae
- + Project Schedule
- + Time Task Matrix

This Proposal contains information that is confidential and proprietary to J.L. Richards & Associates Limited (JLR). Reproduction or use in whole or part for purposes other than its evaluation is not permitted without the express written consent of JLR. In that release of this information could significantly prejudice the competitive position of JLR and/or its sub-consultants, it is specifically claimed that this Proposal is confidential for the purposes of any applicable Freedom of Information legislation.

Introduction

J.L. Richards & Associates Limited (JLR) is pleased to submit this proposal to review and provide the Corporation of the Municipality of Whitestone (Municipality) with a Five-Year Update to the Municipality's Official Plan and a Comprehensive Zoning By-law Update. This proposal has been structured to meet all requirements outlined in the Request for Proposal (RFP) and to comply with the Planning Act's requirements for creating, adopting, and approving a new Official Plan and Zoning By-law. Please refer to Appendix A for the completed Submission Form.

We know Parry Sound District

We are very familiar with small-to-medium sized and rural communities and the approaches that can be taken in these communities, including the Parry Sound District. We work throughout Parry Sound District in the provision of municipal planning services and policy updates. In addition, our proposed project manager was born in Parry Sound and still spends spare time in the District and in Whitestone in particular.

Municipality of Callander: In 2021, JLR was retained by the Municipality of Callander to update the existing Official Plan for the community. We began the process with a special meeting of Council to discuss the community and its future direction. We conducted extensive background research and consulted with Council, staff, public agencies, stakeholders and the public to better understand the community and its planning issues, opportunities and constraints. We prepared a comprehensive background report that examined more than 10 aspects of the community and shared that report with Council and the community for feedback. We updated the background report and used its findings to inform our draft proposed updates to the Official Plan. These updates have been shared with Council and the community and submitted to the Ontario Ministry of Municipal Affairs and Housing for comment. We expect to receive the Ministry's comments on the updated Official Plan later in the Fall now that the new Provincial Planning Statement is finalized and will be coming into effect in October. Since this time, we have been retained by the municipality support planning administrative staff with more complex land-use planning files such as plans of subdivision and condominium.

Township of McKellar: In 2022, JLR was retained by the Township of McKellar to provide in-house land-use planning advisory services. Since coming on board, we have provided general support to Township staff, conducted pre-consultations with property owners or their agents, reviewed and provided professional land-use planning recommendations on several files, met with and presented to Council and provided expert witness support for a preexisting Ontario Land Tribunal appeal.

Township of The Archipelago: In the last few years, JLR has worked with the Township of The Archipelago on several projects. Our relationship began when we were retained to create the first ever employment, population, and housing estimates for the community, which were ultimately presented to and received by Township Council. Based on that work, the Township asked us to draft a new site alteration and tree by-law that would apply to the entire Township and help Council achieve its strategic goal of protecting the natural environment, including those portions of the Georgian Bay Biosphere Reserve that are under the Township's stewardship and care. The draft by-laws have been presented to Council and we recently completed an extensive multi-year engagement program with the community and stakeholders to generate and receive feedback on the drafts. Our relationship continues to grow. We were recently retained by the Township to examine the feasibility of developing a sustainable neighbourhood

in Pointe au Baril Station that will deliver much needed attainable housing for younger families and workers in the community.

Township of Ryerson: JLR has started providing day-to-day land use planning services to the Township of Ryerson since 2024. This includes the provision of general day-to-day planning advice to Township staff and the public, providing pre-consultations with potential applicants, reviewing Planning Act applications and presenting recommendations to Council.

Corporate Profile – JLR

Providing services in planning, engineering, architecture, and project management, JLR's continued industry success is due in part to our innovative excellence—designing boldly, building better, pioneering energy efficiencies, and professionally managing projects. Equally important is JLR's outstanding customer service. All projects, large and small, are defined and developed through close teamwork with our clients whom we regard as project partners. Nearly 70 years of experience has shown us that collaboration provides the best possible project results.

Our power is our people—over 450 across eight offices throughout Ontario, all connected in real time. Founded in Ottawa in 1955, we remain a proudly Canadian employee-owned firm that welcomes people with exceptional talent, abilities, and experience from all over the world. This diversity enhances our aptitude and abilities as well as the culture of cooperative collaboration that makes JLR truly unique.

All JLR projects are created holistically to maximize efficiencies and opportunities and are delivered in more than 75 countries. Our markets include:

Alternative Delivery	Industrial
Buildings	Innovative Energy
Environmental Infrastructure	Mining
Indigenous	Municipal Infrastructure & Planning

Most of JLR's work is done in Ontario with about 80% of our business stemming from repeat and referred clients—validation of both our performance and our client satisfaction. No matter the size or scope of your project, we can effectively realize your vision.

Many JLR projects have received local, national, and international awards. Inspired by our past successes, we always look towards the next opportunities. Exceptional work and unparalleled customer service are what defines JLR today. Together with our clients, we continue to design and create the innovative projects of tomorrow.

JLR recognizes it operates on the traditional territories and lands of the Indigenous peoples that came before us.

Planning Discipline at JLR

JLR's professional planners have been providing land use planning advice and services to municipal clients for more than 50 years. Municipalities were our first planning clients and have remained the primary focus of our planning practice. Over the years, JLR has helped more than 100 municipal clients with their planning needs. Today, we provide municipal planning consulting services to more than 45 municipalities of all sizes across Ontario and beyond. We

understand the Planning Act, Provincial Policy Statement, Official Plans, Zoning By-laws, other provincial legislation and policies, and local land use planning tools.

Currently, JLR has 20 planners on staff, representing over 170 continuous years of experience in land use planning for communities across Ontario. We also have a GIS Technical Group within the Planning division that can provide expertise in planning-related mapping and GIS services.

Experience in policy and regulatory development

JLR's Planning division regularly undertakes work for public and private sector clients across Ontario, providing the following services:

- Land use planning, including official plans, zoning by-laws, community improvement plans, and site plans
- Municipal planning advisory services
- Conceptual and detailed design
- Land development
- Infrastructure renewal
- Roads, parking areas, and bridges
- Stormwater and water resources management
- Environmental assessment
- Contract administration
- Municipal GIS Service

JLR has completed several official plan and zoning by-law exercises for municipal clients similar in size and composition to the Municipality. We understand the importance of clarity and certainty in planning regulatory development and have worked extensively with councils to help carry out planning programs. We work in Parry Sound District and understand the local context and the need to update the Municipality's Official Plan and Zoning By-law. We understand that the Municipality desires an updated official plan and zoning by-law which maintain the strong protections of the Municipality's waterfront environments of the current planning documents, while improving user friendliness clarity of policies and zoning provisions. In addition, the official plan and zoning by-law will need to conform with new provincial policies and comply with changes to provincial planning legislation.

Commitment to building lasting client relationships

With our significant history in the Ontario municipal consulting industry, JLR understands the importance of developing long-term relationships with our clients based on trust and value for service. We pride ourselves on working collaboratively with our clients and being responsive to their individual needs. We are confident that you will find our firm flexible and effective in delivering a new official plan and zoning by-law. JLR is fully committed to this project and will allocate the appropriate resources necessary to meet your requirements.

A strong team of professional planners

JLR strongly believes in professionalism. Ten of our 20 planners are Registered Professional Planners certified to practice in the province of Ontario and full members of the Canadian Institute of Planners. Our remaining team members are working diligently towards professional

certification. All our staff adhere to a high level of professionalism and practice ethically and responsibly.

JLR's Planning team believes in working closely and collaboratively with our clients, answering calls and e-mails in a timely fashion. One of the advantages of having a team with varying levels of experience is that we can assess each file and provide the appropriate level of effort and review. Another advantage of having a larger team is that we always have backups in the event of unanticipated absences.

Corporate Profile – Hutchinson Environmental Sciences Ltd.

Natural Heritage

Hutchinson Environmental Sciences Ltd. (HESL) was established in 2009 to provide science-based and client-focused services to all levels of government, as well as industry, Indigenous groups, and non-governmental organizations across Canada. Our team of 13 scientists specializes in aquatic and environmental sciences, offering scientific, technical, and regulatory services relating to environmental impact assessment, natural heritage evaluation, watershed management, species at risk, and water quality.

HESL has extensive experience providing environmental services for municipalities. We have conducted many projects related to residential and commercial development, environmental impact assessment and review, and monitoring and assessment of aquatic and terrestrial ecosystems and biological communities. We regularly work for municipalities throughout the province (e.g., City of Greater Sudbury, City of Quinte West, City of Guelph, City of Timmins, Town of Orangeville, Haldimand County) to characterize environmental conditions and assess the environmental impacts of development proposals. HESL recently presented to Whitestone's Environmental Committee on lake management and understands the Municipality's general approach to environmental management.

We work in terrestrial and aquatic environments on a wide variety of projects, from small-scale property severances to large-scale resort and housing developments, municipal wastewater servicing, contaminated sites, and hydro-electric initiatives. We have experience in species at risk assessment, wildlife monitoring (amphibians, birds, fish, benthic invertebrates), invasive species management, wildlife risk assessment, ecological land classification, water quality assessment, lake capacity studies, and fish habitat assessment. We are comfortable navigating the environmental permitting process to ensure compliance with applicable policy and legislation.

We effectively characterize environmental conditions, identify environmental constraints, sensitivities, and potential development impacts, and recommend best practices to mitigate and avoid negative environment effects. We are a small responsive company, dedicated to providing balanced, objective, and practical solutions. Our staff apply their strong background in science and policy to generate reliable high-calibre advice, analysis, and interpretation. We are skilled communicators, able to distill complex technical information into easily accessible plain language. Our Canada-wide experience working in environmental impact assessment with a diverse range of clients gives us a broad perspective on effective approaches to land-use planning and environmental protection.

Local Presence

HESL is based in Bracebridge, Ontario and regularly works with area municipalities, including the Township of Lake of Bays, the Township of Muskoka Lakes, Seguin Township, the Township of Georgian Bay, the District Municipality of Muskoka, the Town of Bracebridge, the Town of Parry Sound, and the County of Haliburton.

HESL has presented to the Municipality's Environmental Committee on lake management and environmental management.

HESL will be responsible for reviewing and enhancing the Official Plan and Zoning By-law's protections for the natural environment. This will include a review of legislation and policies affecting natural heritage at the municipal, provincial and federal level, including existing policies in the Municipality of Whitestone Official Plan. HESL will identify gaps and opportunities associated with the existing natural environment policies and how they are executed through the Municipality's Zoning By-law. The review will address natural heritage features such as species at risk, fish habitat mapping, study requirements, and mitigation measures.

HESL will also review lake specific policies for several lakes in the Municipality. HESL notes that capacity status has been determined through Lakeshore Capacity Assessments or consideration of Lake Trout habitat (i.e., Mean Volume Weighted Hypolimnetic Dissolved Oxygen concentrations), while development measurements, such as lot size and frontage have been informed by other factors such as character, fishing pressure, flooding, and docking limitations. HESL will collect and review existing Lakeshore Capacity Assessments and Lake Trout dissolved oxygen assessments to determine the suitability of those findings to inform updated lake management policies. HESL will also review other water quality data available in the Municipality and recommend lake-specific or a municipal-wide lake management and monitoring program based on the available information and lessons learned. HESL will also attend two meetings with Lake Associations.

HESL staff have provided water quality and environmental review consulting services to local municipalities for over twenty years and to other municipalities for over ten years (i.e., the Town of Bracebridge, Township of Lake of Bays, Township of Georgian Bay, and Township of Seguin). We serve as the peer reviewer for the District Municipality of Muskoka (since 2020), the Township of Georgian Bay (since 2021), the Township of Clearview (since 2022), the Town of New Tecumseth (since 2023), and the Town of Bracebridge (since 2024), reviewing natural heritage evaluations and environmental impact studies submitted as part of development applications. In 2022-2023, we worked on the District of Muskoka's Integrated Watershed Management Initiative, developing watershed health indicators and water quality indicators for the Muskoka River Watershed. We are currently conducting a review of the District's Lake System Health Program and related recreational water quality policies contained within its Official Plan to assess the applicability and performance of current policies and to adjust or refine the current approach based on best management practices and current scientific understanding of lake management. In addition, we worked with JLR to review current science and best management practices for shoreline preservation to develop a Shoreline Preservation By-law for the County of Haliburton.

Qualifications and Experience of the Planning Team

We confirm that our proposed team has the necessary knowledge, understanding, experience, ability, and capacity to assist the Municipality in completing this assignment. Our team members have worked within townships and municipalities that are similar in size and have similar requirements to those set out in this RFP. The essential elements of JLR's approach include flexibility and ensuring we work thoroughly with the adequate resources available. Please refer to Appendix B for the curricula vitae for the proposed team members.

Principal-in-Charge

Jason Ferrigan, MSc.Pl., RPP, MCIP, Principal Associate, Chief Planner



Role on project: As Principal-in-Charge, Jason will be responsible for strategic direction, issue management, client relationship, team performance, and senior peer review. He will be available to assist the Municipality with more challenging and contentious planning files. Jason will review the project results, obtain client feedback, and add any additional support to the project team to meet deadlines and deliverables. He will ensure that adequate time and resources are allocated to delivering successful versions of the revised Official Plan and Zoning By-law for the Municipality. He will be available to stakeholders if concerns arise that cannot be resolved at the project management level.

Relevant Project Experience: Jason is familiar with the area through his work with the Township of The Archipelago and prior to joining JLR, Jason served as the Director of Planning for the City of Greater Sudbury and President of the Ontario Professional Planners Institute (OPPI).

Jason has extensive experience developing, updating, and interpreting Official Plans and Zoning By-laws. During his career, he has worked on numerous Official Plan projects in central and northern Ontario. He is currently the Principal-in-Charge of JLR's Official Plan projects in the Township of Hudson, the Township of Harley, the Township of Casey, the Township of Bonfield, the Municipality of Callander, the Desbarats to Echo Bay Planning Board, the Township of Georgian Bluffs, the Town of Grand Valley, the Town of Gananoque, and the Township of Georgian Bluffs. As Planning Director for the City of Greater Sudbury, he led the second phase of the five-year review of the Official Plan, which involved the integration of the Transportation Master Plan and Water/Wastewater Master Plan. As Senior Planner with the City of Greater Sudbury, he led several elements of the first phase of the five-year review including growth and settlement, rural consents, climate change adaptation, and mitigation.

Project Manager and Senior Planner

David Welwood, MES (Planning), RPP, MCIP, Senior Planner



Role on project: As Senior Planner and Project Manager for this assignment, David will be the principal point of contact for the Municipality to ensure responsibility and accountability. He will provide overall project leadership and responsibility, assigning and overseeing the team's services. This will include maintaining appropriate staffing levels, leading the JLR team as required, overseeing project delivery, and confirming the Municipality's project objectives are successfully met on time. David will report to both the Municipality and the Principal-in-Charge who will provide senior peer review.

David has reviewed his other project responsibilities and confirms his availability to dedicate the necessary time to the management and detailed technical leadership of this assignment. He is committed to undertaking this role and will attend all meetings and dealings with external agencies, utilities, and stakeholders, as necessary.

In addition, David was born in Parry Sound and is highly knowledgeable about the surrounding area and is familiar with many of the planning opportunities and challenges facing the District.

Relevant Project Experience: David is very familiar with the Municipality and leads the JLR team responsible for the provision of planning advisory services for the neighbouring Township of McKellar. David has contributed to the development and approval of numerous Official Plans, Zoning By-laws, community improvement plans, reports, and planning studies across Ontario including many municipalities that are similar in composition to Whitestone. He has coordinated public meetings required by the Planning Act, has led core team meetings, and delivered presentations and training for municipal councils and staff on various planning matters, including the review of planning applications.

David is currently working on Official Plans and Zoning By-Laws for the Township of Georgian Bluffs, the Lakehead Rural Planning Board, the Township of Bonfield, the Town of Grand Valley, the Township of Moonbeam, the Township of Hudson, the Township of Casey, the Township of Harley and the Sault Ste. Marie North Planning Area. David recently completed a Comprehensive Zoning By-law Review and update for the Municipality of South Bruce. In the past as a planning consultant, David has developed and contributed to Official Plans and Zoning By-laws for the Township of North Frontenac, the Township of Central Frontenac, the Township of Papineau-Cameron, the Township of Nairn and Hyman, the Town of Blind River, the Township of the North Shore, the Town of Bruce Mines, the Town of Laurentian Hills, and the Central Timiskaming Planning Board. As a Principal Planner with the Region of Waterloo, David participated in the regional review of local comprehensive Zoning By-laws for the City of Cambridge and the City of Kitchener. As a former Provincial Planner with the Ministry of Municipal Affairs and Housing (MMAH), David led the provincial review and approval process of numerous Official Plans in Ontario. This experience means David has a firm understanding of the legislative and policy requirements in order to guide the Municipality through the required Provincial approvals process for the Official Plan.

Alternate Project Manager and Senior Planner

Sarah Vereault, RPP, MCIP, Associate, Senior Planner



Role on project: As Alternate Project Manager, Sarah will be responsible for assuming David's role in an absence, ensuring seamless service delivery to the Municipality. Sarah's role includes providing a senior review of deliverables, as and when required.

Relevant Project Experience: Sarah is currently working with the Township of The Archipelago on the Pointe au Baril sustainable housing project and has worked on Official Plan, Zoning By-law, and Community Improvement Plan projects for numerous municipalities across Ontario.

Sarah has completed Official Plan Reviews for the Town of Northeastern Manitoulin and the Islands, the Township of Matachewan, the City of Elliot Lake, the Town of Espanola, the Town of Smooth Rock Falls, the Sudbury East Planning Board, the Town of Iroquois Falls, and Township of Hornepayne. Sarah has led zoning by-law reviews for the Town of Espanola, the Town of Smooth Rock Falls, the Township of Matachewan, the Town of Northeastern Manitoulin and the Islands, the unincorporated Township of Haggart, the Town of Kirkland Lake, the Township of Hornepayne, and the Town of Iroquois Falls.

Project Planner

Soumaya Ben Miled., M.Arch., M.Pl., Planner



Role on project: As Planner, Soumaya will participate in all project phases and public consultations. She will provide support with the preparation and delivery of reports and final documents.

Relevant Project Experience: Soumaya is an OPPI CIP Candidate with four years of experience in urban and regional planning. She has a strong background in land use planning, master planning, spatial analysis and mapping, planning policy, and environmental planning. In her role as a Planner with JLR, she is responsible for providing planning services for several northern Ontario municipalities. She is currently

working on the Tarbutt Housekeeping Zoning By-law amendment, Desbarats to Echo Bay Official Plan update, and Town of Iroquois Falls Community Improvement Plan. Soumaya provides support on development applications for private and public sector clients.

GIS Technical Support

Kris Kerwin, C.Tech., Senior Geographic Information Systems Technician



Role on project: Kris will assist and support the team in using GIS as a data analysis and visualization tool. For example, some of Kris' GIS-related responsibilities include data capture, data conversion, database design, Lidar integration analysis, photographic survey and photo 3D visualization, GIS analysis, custom online applications, and integration of data from third parties.

Relevant Project Experience: Kris has prepared schedules for several Official Plan and Zoning By-law reviews, as well as site plans, land use surveys, and other thematic map products. He routinely provides support to municipal planners by producing enhanced, user-friendly drawings, maps, figures, and graphics. Some of his GIS-related responsibilities include data capture, data conversion, database design, 3D visualization, GIS analysis, custom applications, and integration of data with other third-party software. Kris has significant experience developing and maintaining projects in the GIS environment. This experience includes initial field data collection using GPS, migrating hardcopy legacy drawings to the GIS environment, and maintenance and management techniques to incorporate ongoing condition assessment data. Kris is currently assisting Bonfield and Grand Valley with mapping for their updated Official Plans and Zoning By-laws.

Hutchinson Environmental Sciences Ltd.

Senior Scientist – Brent Parsons, MSc.



Role on Project: Brent will lead the natural heritage and natural hazards components of the project. He will oversee all tasks associated with the policy review and update, and will provide review and analysis of water quality, at-capacity lakes, fish habitat, and shoreline protection policies.

Relevant Experience: Brent is a Senior Scientist with sixteen years of experience as an environmental consultant with a focus on lake and watershed management, and land use change. Brent's experience has been balanced between guiding private parties through the regulatory environment and providing regulating agencies such as municipalities with expertise through peer reviews and the establishment of science-based planning policies as part of Official Plan updates and lake management plans.

Brent has developed a variety of technical skills associated with characterizing terrestrial and aquatic natural heritage features. He uses his technical skills to collect accurate information and familiarization with environmental policies to assess the impacts of a wide variety of stressors on aquatic and terrestrial ecosystems. He has developed and implemented lake and watershed management plans for a variety of multi-stakeholder groups and is adept at uniting stakeholders through consultation and the communication of scientific information. He is also experienced with natural heritage issues such as Species at Risk, wildlife and vegetation communities with respect to proposed land use change and routinely works with municipalities to provide trusted input on a wide variety of environmental issues.

Senior Scientist – Andrea Smith, PhD



Role on Project: Andrea will contribute to the natural heritage and natural hazards policy review and update. She will participate in the research, consultation, report preparation, and presentation of results, with a focus on significant wildlife habitat and species at risk habitat.

Relevant Experience: Andrea is an ecologist with over 25 years of experience working in ecology and environmental science, including research on natural heritage, species at risk, invasive species, and climate change. She has participated in and led numerous environmental assessment and review projects for municipalities.

Andrea has completed environmental impact studies (EIS), natural heritage evaluations (NHE), and species at risk assessments for residential, recreational, hydroelectric, and water and wastewater servicing projects across Ontario. Andrea has conducted peer reviews of environmental reports and studies (including EIS, NHEs, and species at risk assessments) for municipalities in central Ontario. Her natural heritage work has involved evaluations of terrestrial and aquatic species (e.g., plants, arthropods, amphibians, reptiles, mammals) and a variety of natural heritage features (e.g., Areas of Natural and Scientific Interest, provincially and locally significant wetlands, Environmentally Significant Areas, significant woodlands, significant wildlife habitat, species at risk habitat). She has identified watershed health indicators and

evaluated best practices for shoreline protection and management for municipalities in central Ontario. Andrea has produced plain language summary reports and factsheets for municipal decision-makers and resource managers, as well as magazine and newspaper articles on environmental issues for the public.

Work Plan

Based on our understanding of the project, JLR has proposed a customized methodology, a phased process, to support the requirements of the Municipality as outlined in the RFP.

While we propose to start the project right away, we recommend holding some of the public consultation activities in the Spring and Summer of 2025 in order to maximize input from the Municipality's seasonal residents. The proposed timeline considers the importance of input from the public, MMAH, and Indigenous communities as required by the Planning Act. Please see Appendix C for the proposed Project Schedule, which contains a detailed breakdown of proposed steps and their associated timing.

Phase 1 – Background Review and Study

1.1 Client Kick-Off Meeting (Virtual)

This project will be kicked off with a virtual launch meeting between members of the JLR project team, HESL project team, and Municipal staff. Together, we will discuss the general objectives of the project, roles, and responsibilities of JLR's project team and the Municipality, potential methods to engage the public, required updates to ensure provincial conformity and legislative compliance, and specific updates/topics to be reviewed as identified by the Municipality. We will also further discuss considerations for the work plan and schedule presented here.

Following this meeting, the Municipality will provide background information including the Asset Management Plan, Strategic Plan, any amendments to the Official Plan and Zoning By-law since the last consolidation, the number of new residential building lots approved since the OP was last updated, and any other background data that Council or staff feel are relevant. We understand that there have been two (2) Official Plan Amendments and 20 Zoning By-law amendments since the last update in 2017.

1.2 Request Background Data from MMAH

JLR will request background data from MMAH regarding provincial interests in land use planning in the Municipality at least three weeks in advance of the "one window meeting" held virtually with the MMAH and their partner ministries. JLR will review the background data in preparation for the meeting in step 1.5.

1.3 Request Background Data from West Parry Sound Geography Network (WPSGN), Municipality, and Province

JLR will request any background data or shapefiles from the West Parry Sound Geography Network (WPSGN) and the Municipality to help prepare base maps and Official Plan Schedules. JLR will also obtain the relevant datasets from Land Information Ontario (LIO)

1.4 Pre-Consultation with MMAH (Virtual)

JLR will attend a one window meeting with MMAH and its six partner ministries. The meeting is a key part of the planning process in order to ensure that the new Official Plan meets all required legislative and policy requirements. It should be noted that the meeting schedule is dependent on the availability of MMAH and its six partner ministries. This meeting will provide one window direction regarding matters of provincial interest

and the 2024 Provincial Planning Statement (PPS). Municipal staff are encouraged to attend the meeting.

1.5 Preliminary Work Plan and Public Consultation Plan

JLR will prepare a preliminary detailed work plan and public consultation plan in coordination with Municipal staff as generally outlined in this proposal. Once staff are satisfied with the work plan and public consultation plan, JLR will prepare a Notice of Project Commencement announcing the project and inviting interested parties to provide input. This may include community groups such as lake associations, roads and neighbourhood associations, agricultural groups, the business community, and other groups identified during the kick-off meeting.

For this task and other tasks involving public notification, we will coordinate with the Municipality's Project Lead based on an agreed upon public consultation plan. We will also work with the Municipality to create a circulation list and develop the content for notices and the Municipality's webpage. We suggest that the Municipality consider creating a project-specific email address where people can submit comments.

1.6 Client Meeting: Review Detailed Work Plan and Public Consultation Plan (virtual)

JLR will meet with Municipal staff to discuss the draft detailed work plan and consultation strategy submitted for review. Staff's feedback will be recorded to update and finalize the detailed work plan and consultation strategy.

1.7 Early Consultation with Indigenous Communities

JLR will seek input from Indigenous communities to identify key issues and emerging trends in the Municipality from a policy perspective, especially in areas of natural and cultural heritage preservation, economic development and environmental protection.

JLR will provide letters to be sent to Indigenous communities that may have an interest in the planning program. This will include Wasauksing First Nation, Shawanaga First Nation, Magnetawan First Nation, the Metis Nation of Ontario, and the related tribal councils.

This phase is important to allow for dialog between different parties that have an interest in land development in the municipality.

We note that in-person attendance is sometimes preferred by Indigenous communities. Our budget includes travel time for one meeting with several First Nations which is proposed to be combined with the same trip as the Special Meeting of Council. Should additional meetings and/or coordination be required, we would coordinate such scope of work with and receive prior approval from the Municipality before starting.

1.8 Special Meeting of Council (as required by Section 26, Planning Act)

JLR and HESL will attend the Special Meeting of Council, as required by Section 26(3) of the Planning Act, to kick-off the public process with the Municipality. JLR will present those areas of the Official Plan which require changes due to the 2024 PPS and discuss policy areas the Municipality considers important. JLR will also present the proposed Work Plan and Public Consultation Strategy.

The Special Meeting allows Council and the public an opportunity to identify additional revisions they feel are required to the Official Plan. The Municipality will be in a position to guide this process with our team.

JLR will assist in preparing the notice which can be mailed to specific stakeholder groups, agencies and identified First Nations that may have an interest in lands and development in the Municipality. We would suggest that circulation of the notice for the Special Meeting of Council be done by posting it in a local newspaper as well as on the Municipality's website and social media sites, and distribution using any other preferred communication methods.

It is important to note that public notification for the Special Meeting per Section 26(4) requires a 37-day notice period prior to the meeting.

JLR will coordinate the meeting, prepare materials and prints of documents and schedules, and provide recommendations to the Municipality after the meeting.

It is recommended that the Municipality post a notice on the website inviting the public to participate in the Official Plan and Zoning By-law Review process.

1.9 Public Engagement Survey 1

An online survey will be provided for broad public distribution and can be advertised on the Municipality's website to run over an extended period of time. The initial survey can solicit broad visioning-type questions about positive attributes of the municipality, visions of the future, and opportunities and challenges facing the municipality, for example.

Suggested Audience: General public, lake associations, community groups with broad membership.

1.10 Technical Review of existing Official Plan and Zoning By-law

Using data supplied by the Municipality and MMAH, JLR will conduct a technical review of the existing Official Plan and Zoning By-law in order to highlight where policies and regulations are required to be updated.

1.11 Preparation of a Digital Base Map

It is our understanding that the Municipality has digital base mapping provided by CGIS. JLR will utilize the open data sources (Ontario Geohub, Ontario Geospatial Data Exchange, Ontario Parcel and Municipal Connect (MPAC)) to prepare a base map, which will form the basis for the revised OP and Zoning By-law schedules. Ensuring the availability of datasets from all sources will require co-ordination between JLR and the Municipality, as some of these datasets might need to be requested directly by the Municipality. The Base Map will serve as the foundation for layering background information including OP land use designations, zones, natural heritage features, constraints, roads, etc.

Cartographic map standards will be upgraded to the Base Map to facilitate ease of use and legibility. This base will be provided to the Municipality. A Draft version of the Base Map will be circulated to municipal staff for review and comments. All mapping will be designed to be clear and legible in black and white when reduced to 11" x 17" (.PDF). One set of Schedule revisions is provided for in this budget after the initial Draft OP and Zoning By-law submission.

Phase 2 – Policy Directions

2.1 Background Information Review

JLR will review relevant plans and studies that have been completed or are underway that will inform the revised Official Plan and Zoning By-law, as well as relevant changes to planning legislation, most significantly the release of the 2024 PPS which comes into effect in October 2024, and other policy at the provincial level.

2.2 Prepare Draft Background and Policy Direction Report

JLR will prepare a Draft Background and Policy Direction Report to address new or updated policy matter areas in the updated Official Plan and Zoning By-law, and the policy areas required to comply with the Planning Act, the 2024 PPS, and the Growth Plan for Northern Ontario.

The Draft Background and Policy Direction Report will address the Municipality's existing planning and strategic documents, statistical data as well as issues raised by the Municipality, Provincial Ministries, Indigenous communities, and other agencies. HESL will assist JLR to complete chapters related to a review and update of the Municipality's policies for managing the natural environment and lake water quality. JLR will provide the Draft Background and Policy Direction Report to municipal staff for review and endorsement. This will form the basis for the revised OP and Zoning By-law.

The Draft Background and Policy Direction Report will remain in draft format until the end of Phase 2, as it is anticipated that it will be updated with input from the various public consultation efforts.

2.3 Natural Heritage and Lake-Specific Policies Report

As part of the background process, HESL will prepare a report on the Municipality's natural heritage and lake-specific policies.

HESL will review and provide recommendations for enhancement of the natural environment policies. This review will include legislative and policy context of natural heritage policies at the municipal, provincial, and federal level, including existing natural heritage policies in the Municipality's Official Plan. HESL will identify gaps and opportunities associated with natural environment policies and regulations. Natural heritage features (e.g., Species at Risk, fish habitat mapping), common study requirements (e.g., Environmental Impact Study), and mitigation measures (e.g., buffers) will be discussed.

HESL will also review lake-specific policies as they exist in the current Official Plan for several lakes in the Municipality. Capacity status has been determined through Lakeshore Capacity Assessments or consideration of Lake Trout habitat (i.e., Mean Volume Weighted Hypolimnetic Dissolved Oxygen concentrations), while development requirements, such as lot size and frontage have been informed by other factors such as character, fishing pressure, flooding, parking and docking limitations. HESL will collect and review Lakeshore Capacity Assessments and Lake Trout dissolved oxygen assessments to determine the suitability of those findings to inform updated lake management policies. Other water quality data available in the Municipality will be reviewed as available. HESL will recommend lake-specific or a municipal-wide lake management and monitoring program based on available information and lessons learned.

2.4 Meeting with Municipal Staff (virtual)

JLR will meet with Municipal staff to discuss the Draft Background and Policy Direction Report submitted for review. The draft discussion papers will be released once they have been reviewed and approved by staff.

2.5 Present Draft Background and Policy Direction Report to Council (virtual)

JLR will present the key findings from the Draft Background and Policy Direction Report to Municipal Council for discussion and feedback as to the direction for the updated Official Plan and Zoning By-law.

2.6 Public Engagement Survey 2

An online survey will be provided for broad public distribution and can be advertised on the Municipality's website to run over an extended period of time. This second survey can be targeted to specific policy areas and geared towards participants who have particular interests as identified during the project start-up, i.e., shoreline development, housing, employment lands, roads and transportation, for example.

Suggested Audience: General public, lake associations, community groups with broad membership.

2.7 Focus Groups (In-Person)

JLR will prepare and facilitate up to four (4) one-hour focused discussion groups with key stakeholders identified in the consultation strategy with input from Municipal staff. It is anticipated that two of the four meetings will be with lake associations and HESL will attend those meetings. Emergent themes from the focus groups will inform updates to the discussion papers and the policy directions report.

2.8 Public Information Centre (in-person)

JLR will facilitate an in-person public information session to introduce the project to the public and provide the preliminary results of background research thus far. The public information session will be designed to invite participants to think creatively and share their values, experiences, and expertise on their community and their vision for future growth and development.

JLR will draft all required notices and facilitation materials and provide these to the Municipality for review and comment, accounting for one round of revision following staff's feedback.

2.9 Council Update (virtual)

JLR will present an update to Council highlighting the results of the Phase 2 public engagement activities including key themes, and policy areas and regulations to be updated in the Official Plan and Zoning By-law.

Phase 3 – Draft Official Plan Changes

3.1 Prepare Draft Redline Changes to Official Plan

Following the confirmation of policy directions and inputs from the early consultation with Indigenous communities and the public, JLR will draft the proposed changes to the text of the Official Plan.

3.2 Staff Consultation on Draft Documents (virtual)

JLR will provide a copy of the draft changes to the Official Plan to Municipal Staff for review. JLR will hold a teleconference to discuss any proposed revisions and will revise the documents prior to the Public Open House. One set of revisions is provided for in this budget after the initial draft submission.

3.3 One Window Early Consultation with MMAH (virtual)

JLR will circulate a copy of the Background and Policy Directions Report (Phase 2 deliverable) and the draft redline Official Plan changes and schedules to MMAH as part of an "early consultation" exercise. Consulting with MMAH at least 90 days prior to the statutory public meeting and adoption of the document is a requirement of the Planning Act and helps to streamline the Ministry's review and approval of the final Official Plan Amendment adopted by Council. Our experience with this process has shown that it will be necessary to identify the Municipality's anticipated Public Meeting date as early as possible in the process to ensure MMAH's timely response to early consultation.

It should be noted that in our experience, MMAH and partner ministries' review of the draft document can occur within the required 90 days, however, sometimes this requires more time depending on the complexity of the proposed policy changes, staff capacity at MMAH and partner ministries, and Indigenous community consultation.

Following the receipt and review of the MMAH comments, JLR will identify areas where adjustments are essential and make the required revisions to the Official Plan.

3.4 Meeting with Municipal Staff to Discuss MMAH One Window Early Consultation Comments (virtual)

JLR staff will meet with Municipal Staff to discuss MMAH One Window Comments and the need for any further changes to the Official Plan.

3.5 Prepare Draft Official Plan Amendment

JLR will prepare a Draft Official Plan Amendment including revised schedules for the Public Open House.

3.6 Statutory Public Open House (in-person)

Pursuant to sections 17(15) and 26(9) of the Planning Act, at least one open house is required to give the public an opportunity to review and ask questions about the draft documents. JLR has budgeted for two representatives to attend the Draft Official Plan Public Open House. The Open House is an opportunity for the public to review the draft documents and mapping in an informal setting. The Open House will explore issues based on previous discussions that arose in background research and public engagement.

3.7 Maintain Record of Public Comments

Throughout the project, JLR will maintain a database of public comments received throughout the entire public consultation process including both written and oral. It is recommended that the Municipality also keep the same record. The Record will be included in the staff reports in Step 4.1 and will be submitted to MMAH with the adopted Official Plan Amendment.

Phase 4 – Final Official Plan

4.1 Prepare Public Meeting Report

Following the Open House and MMAH early consultation, JLR will review any public comments that have been received and provincial one-window comments, if any, and provide recommendations in the form of a Planning Report for Municipal Staff and Council regarding potential response and/or revisions to the draft Official Plan Amendment.

4.2 Statutory Public Meeting (in-person)

Pursuant to sections 17(15) of the Planning Act, at least one public meeting is required for the purpose of allowing the public to make a representation in respect of the proposed official plan.

The Statutory Public Meeting will be held to present the final Official Plan Amendment for Council's consideration and for Council to formally receive written or oral submissions from the public. We expect that there will be little change at this point due to the level of public participation during the process. Based upon the input at the meeting, Council may choose to formally adopt the Official Plan Amendment at this meeting or may choose to defer adoption to a subsequent meeting based upon a request for additional information.

4.3 Update Official Plan per comments received

JLR will make necessary updates following the public meeting in consultation with the Municipality. JLR will also prepare a recommendation memo outlining the changes made to the draft Official Plan Amendment since the Statutory Public Meeting, if any.

4.4 Present Final Draft Official Plan Amendment to Council for adoption (virtual)

JLR will present the updated versions of the Official Plan virtually for Council adoption following the Statutory Public meeting.

4.5 Submit adopted Official Plan Amendment to MMAH for approval

The Municipality's adopted Official Plan Amendment will be submitted to MMAH for approval. JLR will assist the Municipality in preparing the record required in Section 17(31) of the Planning Act to be forwarded to MMAH. The Planning Act provides the approval authority with a 120-day timeline for approvals; however, MMAH indicates that this timeline may be reduced if the early consultation approach is followed.

Phase 5 – Draft Zoning By-law Changes

5.1 Prepare Draft Redline Changes to Zoning By-law

Following the submission of the Official Plan to the Province for review and approval, and previous consultation activities, JLR will draft the proposed changes to the text of the Zoning By-law.

5.2 Staff Consultation on Draft Document (virtual)

JLR will provide a copy of the draft changes to the Zoning By-law to Municipal Staff for review. JLR will hold a teleconference to discuss any proposed revisions and will revise the documents prior to the Public Open House. One set of revisions is provided for in this budget after the initial draft submission.

5.3 Prepare Draft Zoning By-law Amendment

JLR will prepare a final Draft Zoning By-law Amendment including revised schedules for the Public Open House.

5.4 Statutory Public Open House

Pursuant to section 34(12) of the Planning Act, at least one open house is required to give the public an opportunity to review and ask questions about the draft documents. JLR has budgeted for two representatives to attend the Draft Zoning By-law Amendment Public Open House. The Open House is an opportunity for the public to review the draft document and mapping in an informal setting. The Open House will explore issues based on previous discussions that arose in background research and public engagement.

5.5 Prepare Public Meeting Report

Following the Open House JLR will review any public comments that have been received, if any, and provide recommendations in the form of a Planning Report for

Municipal Staff and Council regarding potential response and/or revisions to the draft Zoning By-law Amendment.

5.6 Statutory Public Meeting (in-person)

Pursuant to section 34(12) of the Planning Act, at least one public meeting is required for the purpose of allowing the public to make a representation in respect of the proposed zoning by-law.

The Statutory Public Meeting will be held to present the final Zoning By-law Amendment for Council's consideration and for Council to formally receive written or oral submissions from the public. We expect that there will be little change at this point due to the level of public participation during the process. Based upon the input at the meeting, Council may choose to formally adopt the Zoning By-law Amendment at this meeting or may choose to defer adoption to a subsequent meeting based upon a request for additional information.

The Zoning By-law Amendment will not come into full force and effect until the Official Plan Amendment is approved by the Province.

5.7 Update Zoning By-law per comments received

JLR will make necessary updates following the public meeting in consultation with the Municipality. JLR will also prepare a recommendation memo outlining the changes made to the draft Zoning By-law Amendment since the Statutory Public Meeting, if any.

5.8 Present Final Zoning By-law Amendment to Council for adoption (virtual)

JLR will present the updated version of the Zoning-by law virtually for Council adoption following the Statutory Public meeting.

5.9 Consolidate Official Plan and Zoning By-law, and Provide GIS Dataset to WPSGN

JLR will prepare a consolidated version of the Whitestone Official Plan incorporating any Minister's modifications that formed part of the Ministry's approval of the Official Plan Amendment. JLR will also consolidate the final approved Zoning By-law Amendment into the Municipality's Comprehensive Zoning By-law.

At this time, JLR will export the final Official Plan and Zoning

5.10 Debrief and Closure Meeting with Municipal Staff

After MMAH approval has been received, JLR will meet with Municipal Staff to formally close the project and ensure the Municipality has finalized copies of all deliverables.

Project References

Municipality of Callander New Official Plan (JLR)	
Client Contact	Ashley Bilodeau - Senior Municipal Director Tel: (705) 752-1410 ext. 224 Email: abilodeau@callander.ca
Project Description	<p>JLR assisted the Municipality of Callander with the creation of a new Official Plan that will guide growth and change in the community over the next 25 years.</p> <p>As part of this process, we worked with the municipality and community to create a plan that better balances local and provincial goals and objectives for land use planning and a plan that will provide clear, reasonable, flexible guidance to allow the municipality to respond to new economic opportunities as they emerge while protecting the natural environment and public health and safety.</p> <p>The Official Plan review process was supported a consultation program that engaged residents, stakeholders and decision makers and cultivated broad support and buy in for the plan outcomes. Various tools were used including notices, web updates, social media posts, individual stakeholder discussions, group stakeholder discussions, Planning Advisory Committee Meetings, Council Meetings, open houses and workshops.</p>

Township of Georgian Bluffs Official Plan Review (JLR)	
Client Contact	Michael Benner, Principal Planner Tel: (519) 376-2729 E-mail : mbenner@georgianbluffs.ca
Project Description	JLR is currently assisting the Township of Georgian Bluffs with updating their Official Plan to reflect the current policy and regulatory requirements in the Planning Act, the 2024 Provincial Planning Statement, the Niagara Escarpment Plan, the County of Grey Official Plan and other applicable planning legislation and documents. In addition, JLR is assisting the Township to incorporate amendments, update its mapping, and provide new and updated policy for second dwelling units, cannabis, short-term rentals, climate change, Indigenous peoples, affordable and attainable housing, source water protection and servicing requirements.

Municipality of South Bruce Zoning By-law Review (JLR)	
Client Contact	Phil Van Hardeveld, Chief Building Official Tel: (519) 392-6623 E-mail : pvanhardeveld@southbruce.ca
Project Description	JLR recently assisted the Municipality of South Bruce with updating its Zoning By-law to conform with the Municipality's Official Plan and the County of Bruce Official Plan. In addition, JLR helped the Municipality to incorporate amendments, update its mapping, and provide a new and updated regulatory framework for additional residential units, on-farm diversified uses, short-term rentals, alternative forms of housing, floodplain mapping, source water protection and servicing requirements.

District Municipality of Muskoka Recreational Water Quality Policies and Causation Study Program Review (HESL)	
Client Contact	Lisa Marden, Director of Planning Tel.: 705-645-2100 ext. 4396 Email: lisa.marden@muskoka.on.ca
Project Description	<p>HESL evaluated the District's Lake System Health Program and related shoreline management policies through a review of existing policy, review of shoreline development approaches used by other jurisdictions in North America, discussion of lake management goals and considerations, and development of recommendations to update and strengthen the District's approach.</p> <p>HESL conducted a review of relevant lake system health policies in the District's Official Plan relating to recreational water quality, water quality indicators, general development policies, and enhanced protection policies. In addition, we reviewed six causation studies completed for the District. We examined shoreline management best practices in 14 jurisdictions across Canada and the United States to identify technical and planning approaches that might be applicable to the District. We synthesized current scientific understanding of lake management and related issues to inform recommended changes to the District's approach. Recommendations were made for a new lake management approach and updates to the Recreational Monitoring Program.</p> <p>Future collaboration with the District will focus on translating these recommendations into appropriate policy language for inclusion in future revisions to the District's Official Plan.</p>

Public Consultation

JLR understands that successful Official Plan and Zoning By-law reviews require good communication, engagement, and collaboration between the public and other stakeholders. JLR will establish a public consultation plan at the outset of the Official Plan and Zoning By-law review that aligns with the RFP requirements and the proposed work plan outlined above.

JLR will also communicate with and engage stakeholders and residents at key milestones in the work plan to share information, receive feedback and build understanding, trust, and confidence in the outcomes of the project. JLR understands that every community has unique needs and preferences when it comes to public consultation and community engagement. As a result, we have prepared a plan with the option to add additional consultation for an extra fee to provide the Municipality with the ability to cater its consultation to meet the needs of the community while keeping the project within budget. The public consultation plan includes a mix of in-person and virtual engagement opportunities.

Throughout all engagement opportunities, JLR will maintain a clear record of public comments to be included in the Statutory Public Meeting Report and Recommendation Report.

Pricing

A detailed time-task matrix, including a breakdown of hourly rates and predicted hours for each team member by task, is provided in [Appendix D](#). The work plan described in this proposal includes professional fees in the amount of \$121,949.50 plus disbursements of 7% and HST for a grand total of \$145,900.16.

Disbursements are added to the professional fees noted above to cover all project-related expenses such as conference calls, printing, and reproduction.

Invoicing will be done monthly and will cover only work that has been completed during the previous month. This budget will not be exceeded unless authorized by the Municipality.

Deliverables

For each phase of the project, JLR will provide the Municipality with the following documents:

Phase 1: Background Review and Study

- One digital copy of the Work Plan and Public Consultation Strategy.
- One digital copy of the Background and Issues Report.

Phase 2: Policy Directions

- One digital copy of all presentation materials (PPT/posters/mapping).
- One digital copy of the Policy Directions Report.
- One digital copy of the Notice of PIC.

Phase 3: Draft Official Plan and Zoning By-law

- One digital copy of all presentation materials (PPT/posters/mapping).

- One digital copy of the Notice of Public Open House and Notice of Statutory Public Meeting.
- One digital copy of the Public Meeting Report.

Phase 4: Finalization

- Two (2) bound hard copies of all draft and final reports.
- One digital PDF and one digital Word copy of the final MMAH approved Official Plan and approved Zoning By-law texts.
- One digital PDF copy of the approved Official Plan and approved Zoning By-law schedules and illustrations.
- All GIS information including Official Plan and Zoning By-law schedules.
- One (1) electronic and one (1) hard copy of all meeting minutes, public notices, presentations, handouts, comments, sign-in sheets, etc. prepared for, or as result of the public consultation, and Official Plan Review and Zoning By-law process.



APPENDIX A

+ Submission Form

Statement of Acceptance (Appendix A)


All responses must be signed:

I/We certify that the information provided in this RFP Response Document is true and complete.

I/We declare that no employee of the Municipality of Whitestone is or will become interested, directly or indirectly as a contracting party or otherwise in the supplies, work or business to which it relates or in any portion of the profits thereof, or in any such supplies to be therein or in any of the monies derived there from.

I/We further declare that the undersigned is empowered by the Proponent to negotiate all matters with the partnering municipality's representatives, relative to this Proposal.

I/We further declare that the agent listed below is hereby authorized by the Proponent to submit this Proposal and is authorized to negotiate on behalf of the Proponent.

Legal Company Name:	J.L. Richards & Associates Limited
Respondent's Signature:	
Respondent's Printed Name:	Jane Wilson
Respondent's Title:	Associate, Municipal Infrastructure and Planning Chief
Email:	jwilson@jlrichards.ca
Business Phone:	(226) 780-7487
Business Fax:	
Mailing Address	314 Countryside Drive Sudbury, ON P3E 6G2



APPENDIX B

+ Curricula Vitae



Education

Master of Urban and Regional Planning,
Virginia Commonwealth University, 2018

Post-graduate Certificate, Geographic
Information Systems, Virginia
Commonwealth University, 2018

Master of Architecture and Urban Planning,
Ecole Nationale d'Architecture et
d'Urbanism, 2015

Fluent in English, French, and Arabic

Employment History

2023 to Date: J.L. Richards & Associates
Limited – Planner

2021 to 2023: SCET-TUNISIE –
Architecte-Urbaniste chargée d'études

2019 to 2020: VNG International – Project
Manager

2019: DIRASSET International – Urbaniste

2018: Timmons Group – Landscape
Architecture and Planning Intern

2017: Cite Design – Urban Design Intern

2017: Virginia Chapter of the American
Planning Association – Policy and Planning
Coordination Intern

Professional Associations/ Memberships

Ontario Professional Planners Institute
(OPPI) Candidate Member

Canadian Institute of Planners (CIP)

Qualifications & Expertise

Soumaya is an urban and regional planner with a background in architecture and more than four years of professional experience.

With JLR, Soumaya works on updates of Official Plans and Zoning By-laws, providing municipal advisory services to Ontarian municipalities and the development of a Community Improvement Plan. She supports with reviewing land use planning applications and preparing reports analyzing the conformity with the Planning Framework. Soumaya's work includes working on land use planning projects for private clients.

In her previous roles, Soumaya specializes in urban development, regional planning, and master planning. She collaborated with engineering and planning firms and engaged with public representatives, consultants, and stakeholders.

Representative Project Experience

Planner: Desbarats to Echo Bay Planning Board, Desbarats to Echo Bay Planning Area Official Plan Update

Planner: City of Greater Sudbury, Update of the Downtown Master Plan

Planner: Township of Hudson, Official Plan and Zoning By-law Update

Planner: Township of Harley, Official Plan and Zoning By-law Update

Planner: Township of Casey, Official Plan and Zoning By-law Update

Planner: Town of Iroquois Falls, Community Improvement Plan

Planner: Desbarats to Echo Bay, Official Plan Update

Planner: The Township of Tarbutt, Tarbutt Zoning By-law Housekeeping Amendment

Planner: The Corporation of the City of North Bay, Trout Lake Watershed Study and Plan

Planner: Kingsway Entertainment District Inc., Kingsway Waste Management Facility ZBL Amendment

Planner: Gabonese Fund for Strategic Investments (FGIS), Master Plan for Development and Urban Planning of Libreville (private financing, Phase 1 – Diagnostic)

Planner: Ministry of Construction, Housing and Urban Planning, Feasibility Study to Conserve and Preserve the Green Zone of the Master Plan Grand Abidjan (SDUGA) (Cost €470 000, Phase 2-Diagnostic and Phase 3-Action Plan)



Hutchinson Environmental Sciences Ltd. (HESL) was formed in November of 2009 as a consulting firm specializing in aquatic and environmental science, technical facilitation and peer review services.

Brent Parsons joined HESL in February of 2013. Brent has sixteen years of experience as an environmental consultant with a focus on lake and watershed management, and land use change. Brent's experience has been balanced between guiding private parties through the regulatory environment and providing regulating agencies such as municipalities with expertise through peer reviews and the establishment of science-based planning policies as part of Official Plan updates and lake management plans.

Brent has developed a variety of technical skills associated with characterizing terrestrial and aquatic natural heritage features. He uses his technical skills to collect accurate information and familiarization with environmental policies to assess the impacts of a wide variety of stressors on aquatic and terrestrial ecosystems. He has developed and implemented lake and watershed management plans for a variety of multi-stakeholder groups and is adept at uniting stakeholders through consultation and the communication of scientific information. He is also experienced with natural heritage issues such as Species at Risk, wildlife and vegetation communities with respect to proposed land use change and routinely works with municipalities to provide trusted input on a wide variety of environmental issues.

Professional History

Hutchinson Environmental Sciences Ltd.

Senior Aquatic Scientist
Bracebridge, ON
February 2013-Present

Beacon Environmental

Aquatic Ecologist
Bracebridge, ON
2010-2013

Michalski Nielsen Associates

Aquatic Ecologist
Bracebridge, ON
2008-2010

Irish Environmental Protection Agency /Trent University

Biomonitoring Scientist
2007-2008

Education

M.Sc. Watershed Ecosystems

Trent University
Supervisor: Dr. P.J. Dillon
"A bioassessment of lakes in the Athabasca Oil Sands Region"
2005-2007

B.Sc. (Hons) Environmental Science and Physical Geography

Nipissing University
North Bay, ON
2001-2005

Project Experience

Lake Management Studies

- ✦ *Lake of Bays Official Plan Update (2024 - present) - Township of Lake of Bays*
Completed discussion papers on natural heritage features and shoreline development which included a review of relevant policies, a primer on the underlying scientific knowledge and recommendations for new policy development.
- ✦ *Shallow Lakeshore Capacity Assessment (2024 - present) - Municipality of Mattice-Val Côté*
Completed a Lakeshore Capacity Assessment of Shallow Lake to determine development capacity. Also reviewed recreational capacity, lake health and recommended various Best Management Practices.
- ✦ *Review of Lake System Health Program and Causation Studies (2015 - present) - District of Muskoka*
Reviewed Official Plan policies, Causation Study results as well as lake management approaches used by other jurisdictions. Developed recommendations for monitoring and lake management based on lessons learned and an in-depth assessment of the strengths and weaknesses of lake management tools available.

- ✦ *Trout Lake Lakeshore Capacity Assessment (2023 - present) - Municipality of French River*
Completing a background review and field investigations to inform development of a lake management plan based on lakeshore capacity modelling, measured water quality, recreational capacity and dissolved oxygen modelling.
- ✦ *Water Quality Indicators - Muskoka River Watershed (2022 - 2023) - District of Muskoka*
Reviewed active monitoring programs and completed a literature review on emerging threats to water quality to develop recommendations related to water quality monitoring in the Muskoka River Watershed.
- ✦ *Water Quality Monitoring Planning (2022 - 2023) - Coalition of Haliburton Property Owners Association*
Developed recommendations for lake monitoring best practices including the resources required; reviewed technology options for continuous water quality monitoring; provided recommendations for data management and analysis.
- ✦ *Lake Eugenia Management Study (2022 - present) - Mr. Doug Hill*
Completed a background review, field investigations and a gap analysis. Development management and monitoring recommendations designed to manage algal and macrophyte growth.
- ✦ *Lake Clear Capacity Assessment (2022 - present) - Township of Bonnechere Valley*
Reviewed historical water quality and completed field investigations to determine if Lake Clear is at development capacity through analysis of water quality data and modelling of both phosphorus and dissolved oxygen concentrations.
- ✦ *Hudson Lakeshore Capacity Assessments (2022 - 2023) - Township of Hudson*
Established a water quality baseline through background review and field investigations of five lakes. Determined development capacity through Lakeshore Capacity Modelling and review of water quality information.
- ✦ *Oak Lake Water Quality Assessment (2018 - 2022) - City of Quinte West*
Reviewed historical monitoring data, developed and implemented a monitoring program of water quality, septic systems and surveys of point and non-point source discharges, and developed a lake management plan designed to control phosphorus enrichment, oxygen deficiency, nearshore bacteria concentrations and excessive growth of nuisance macrophytes and algae. Management recommendations included the review of a wide variety of watershed and active lake management options.
- ✦ *Expert Input for In-Lake Treatment of Pigeon Lake (2021 - 2023) - Alliance of Pigeon Lake Municipalities*
Completed a comprehensive background review of a variety of Pigeon Lake reports focused on water quality and phytoplankton assessment and related remediation options. Assessed the appropriateness of sediment inactivation through lake-specific criteria and uncertainties.
- ✦ *Trout Lake Watershed Study and Management Plan (2021 - 2023) - City of North Bay*
Reviewed lake water quality to determine the impact of development on water quality. Assessed municipal best practices and completed lakeshore capacity modelling to inform consultation and ultimately, the development of lake management recommendations.
- ✦ *Shoreline Preservation Review and Consultation (2021 - 2022) - County of Haliburton*
Completed a literature review of current science and Best Management practices related to shoreline protection. Consulted with stakeholders and developed a Shoreline Preservation By-law that balances environmental stewardship and public best interests.

- ✦ *Stormwater Assessment, Planning and Implementation of the Cobden Agriculture Area (2021 - 2022) - Township of Whitewater Region*
Characterized existing stormwater quality and management in Cobden's agricultural area. Identified priority areas of high nutrient loading and developed Best Management Practices for reduction of phosphorus loads to downstream Muskrat Lake. Evaluated phosphorus offsetting measures through criteria comparison and completed extensive consultation with various local, regional, and provincial organizations.
- ✦ *Nepahwin Lake Causation Study (2020) - City of Greater Sudbury*
Evaluated rising total phosphorus concentrations through a background review, focused water quality sampling and investigation of potential causal factors, including urban runoff.
- ✦ *Sturgeon Lake Assimilative Capacity Study (2020) - M2 Engineering*
Evaluated the impacts of the current lagoon system on downstream water quality and the impacts of six future servicing scenarios based on the extent of mixing zones in the receiver, the effect of discharge on the receiving environment and discharge duration.
- ✦ *Porcupine and Cook's Lakeshore Capacity Assessment (2020) - City of Timmins*
Determined the development capacity of Porcupine and Cook's lakes through completion of lakeshore capacity assessments and with consideration of high intensity development, sewage bypasses, mining influences and other factors.
- ✦ *Lloydminster Assimilative Capacity Study (2019 - 2020) - City of Lloydminster*
Assessed the feasibility of discharging treated municipal wastewater from the City to the Neale-Edmunds Stormwater Complex through characterization of hydrology, water quality and aquatic biology.
- ✦ *Shackleton and Watersnake Lakeshore Capacity Assessments (2019) - Township of Fauquier*
Assessed water quality conditions, completed lakeshore capacity assessments and reviewed related policy to develop lake management plans for Shackleton and Watersnake lakes.
- ✦ *Construction Runoff and Dewatering Monitoring, 100 ha Development Site, Barrie ON (2013 - present) - Private Developer*
Monitored and provided recommendations related to the dewatering and discharge of suspended solid, metal and nutrient-containing water during dewatering and large construction excavation to mitigate impacts on Lake Simcoe. Also, managed the planting of native macrophytes into the newly excavated marina to deter the establishment of invasive species.
- ✦ *York Region Marine Facility Development Phosphorus Budget (2018) - Golder Associates*
Quantified pre-and post-construction phosphorus loads using the Phosphorus Budget Tool for the Lake Simcoe Watershed in accordance with requirements of the Lake Simcoe Protection Plan and Lake Simcoe Region Conservation Authority's Phosphorus Offsetting Policy.
- ✦ *Surface Water Impact Assessment Peer Review (2018) - Cambium Consulting and Engineering*
Assessed the Surface Water Impact Assessment completed in support of the development of 34 lots on Green Lake, Labrador Lake and the Madawaska River in terms of conformity with applicable legislation.
- ✦ *Wetlands and Watercourses and their Role in Mitigating Nutrient Impacts on Lake Erie (2017) - Environment Canada*
Assessed and quantified the role of watercourses and wetlands in nutrient retention, developed monitoring approaches and recommended best management practices to mitigate nutrient impacts to Lake Erie.

- ✦ *Wetlands and Watercourses and their Role in Mitigating Nutrient Impacts on Lake Erie (2017) - Environment Canada*
Assessed and quantified the role of watercourses and wetlands in nutrient retention, developed monitoring approaches and recommended best management practices to mitigate nutrient impacts to Lake Erie.
- ✦ *Lac La Biche Sensitive Habitat Mapping Project - Living Lakes Canada (2017)*
Identified and mapped sensitive shoreline habitat features to inform a sustainable shoreline development process in Lac La Biche, Alberta. HESL compiled, synthesized and reported on ecological data collected for the lake, and used information to develop Management Guidelines.
- ✦ *McCrank and Westvale Drive Sampling (2016) - District Municipality of Muskoka*
Determined the existing impacts of septic systems on the water quality of adjacent watercourses through analysis of caffeine and other wastewater indicators to inform the need for servicing improvements.
- ✦ *Baker Lake Cumulative Effects Monitoring Program (2016) - Kivalik Inuit Association*
Defined baseline conditions, identified any issues related to existing mining operations or wastewater impacts and informed assessment of drinking water quality through sampling and interpretation of water quality in Baker Lake and incorporation of Traditional Knowledge.
- ✦ *Lac Waterloo Total Maximum Daily Load Study (2015 - 2016) - Stantec*
Calculated total maximum daily loads of phosphorus to inform dredging operations of Lac Waterloo through a mass balance evaluation of the current nutrient budget, including an assessment of internal phosphorus loading, and prediction of nutrient loads during and after dredging.
- ✦ *Nearshore Monitoring Protocol Development (2015 - 2016) - Conservation Ontario*
Developed a protocol for monitoring a variety of different variables including water quality, fish, benthic invertebrates in the nearshore environment of southeast Georgian Bay. The protocol includes a decision-making framework and recommended methodologies based on the results of an extensive literature search.
- ✦ *White Lakeshore Capacity Assessment (2015) - White Lake Campgrounds*
Assessed the development capacity of White Lake for the development of 160 trailer units through the Lakeshore Capacity Assessment in relation to occurrence of recent blue-green algal blooms.
- ✦ *Review and Analysis of Existing Approaches for Managing Shoreline Development on Inland Lakes (2014) - Ministry of Environment*
Reviewed a variety approaches used to manage shoreline development throughout North America. Assessed technical and planning tools for application in Ontario.
- ✦ *Waterfront Guidelines Study (2013 - 2014) - Mississippi Valley Conservation Authority/Cataraqui Region Conservation Authority/Rideau Valley Conservation Authority*
Recommended waterfront development guidelines for Eastern Ontario's Lake Country based on water quality trends and scientific understanding.
- ✦ *Sturgeon Bay Water Quality Monitoring for Phoslock Treatment (2013 - 2014) - Township of the Archipelago*
Carried out baseline chemical and biological monitoring program associated with the application of Phoslock designed to reduce the occurrence of algal blooms in Sturgeon Bay and reported findings through annual reports.

- ✦ *Natural Heritage Inventory, Evaluation and Management Strategy for the Westminster Ponds/Pond Mills Environmentally Significant Area (2013) - City of London*
Characterized water quality and fish communities to evaluate changes in water quality in several kettle lakes in London, ON and development management recommendations
- ✦ *Coastal Monitoring Program: 2012 Results (2013) - Georgian Bay Forever*
Reviewed and analyzed data collected during 2012 to identify areas of concern and improve the 2013 coastal monitoring program.
- ✦ *Oak Bay Development Water Quality Monitoring (2010 - 2013) - Millhouse Group Incorporated*
Executed the construction and post-construction phases of a water quality monitoring program designed to manage fertilizers and pesticides associated with the Oak Bay Golf Course.
- ✦ *Bruce Lake Family Association Water Quality Monitoring (2010 - 2013) - Bruce Lake Family Association*
Analyzed water quality data to determine impacts of golf course operations on Bruce Lake. Utilized data to recommended improvements to the water quality monitoring program designed to assess golf course impacts.
- ✦ *Township of McKellar Land Use Study (2009) - Township of McKellar*
Provided environmental advice to the Township of McKellar during an Official Plan update focused on shoreline development. Assessed water quality, fish habitat and recreational capacity on seventeen lakes and two rivers within the Township. Presented results at numerous council meetings, open houses and through an in-depth report.

Natural Heritage Studies

- ✦ *Shoreline Preservation Review and Consultation (2021 - present) - County of Haliburton*
Completed a literature review of current science and Best Management practices related to shoreline protection. Consulted with stakeholders and developed a Shoreline Preservation By-law that balances environmental stewardship and public best interests.
- ✦ *Environmental Constraints Analysis (2021) - Unidentified Municipality*
Completed a background review and confirmatory field investigations over a large land area to establish the principles of development and identify high level opportunities and constraints to development.
- ✦ *Muskoka Lakeside Peer Review (2021) - District of Muskoka*
Peer reviewed an Environmental Impact Study in support of a proposed draft plan of subdivision.
- ✦ *Salmon Run Peer Review (2021) - District of Muskoka*
Peer reviewed an Environmental Impact Study in support of a proposed draft plan of subdivision.
- ✦ *Deep Lake Water Cooling Expansion Environmental Assessment (2019 - present) - Enwave Energy Corporation*
Completed an Environmental Impact Study (EIS) for the proposed expansion of the cooling system by characterizing natural heritage features and functions that could be impacted by construction of drop shafts and a water intake, and operation of the water intake and water outlet. Determined potential negative impacts of the project and recommended mitigation measures. Submitted a Request for Project Review to DFO and received a Letter of Advice in support of the project.
- ✦ *Southampton WWTP Expansion EIS (2019 - 2020) - Ainley Group*
Characterized natural heritage features and functions that could be impacted through the proposed upgrade and expansion of the Southampton Water Pollution Control Plant and associated infrastructure.

- ✦ *Muskoka Royale Peer Review (2019 - 2020) - Town of Bracebridge*
Reviewed an EIS in support of a large commercial development through an assessment of information provided and methodologies undertaken in relation to relevant environmental legislation.
- ✦ *Wasaga Pines Scoped Environmental Impact Study (2019) - Parkbridge*
Completed a scoped EIS focused on characterizing natural heritage features and completing an impact assessment associated with the proposed construction of a septic tile bed.
- ✦ *Shackleton and Watersnake Lakeshore Capacity Assessments (2019) - Township of Fauquier*
Assessed water quality conditions, completed lakeshore capacity assessments and reviewed related policy to develop lake management plans for Shackleton and Watersnake lakes.
- ✦ *Seguin Dagg EIS Review (2019) - Township of Seguin*
Reviewed an EIS and SAR assessment of a proposed road crossing of aquatic and wetland habitats.
- ✦ *Mansfield Environmental Impact Study (2018 - 2019) - Mansfield Ski Club*
Assessed natural heritage features and functions in relation to the proposed redevelopment of the Mansfield Ski Club, including construction of commercial and residential buildings, a snow-making pond and re-grading of the ski hill.
- ✦ *Layzee Acres EIS (2018 - 2019) - Layzee Acres Park and RV Sales*
Completed a scoped EIS in support of the proposed expansion of Layzee Acres RV Sales and Service. Characterized vegetation communities, species at risk, breeding birds, wildlife and completed a phosphorus budget.
- ✦ *Surface Water Impact Assessment Peer Review (2018) - Cambium Consulting and Engineering*
Assessed the Surface Water Impact Assessment completed in support of the development of 34 lots on Green Lake, Labrador Lake and the Madawaska River in terms of conformity with applicable legislation.
- ✦ *Horn Lake Capacity Assessment (2017 - 2018)*
Completed a Lakeshore Capacity Assessment to assess the proposed development of five lots on total phosphorus and dissolved oxygen concentrations in terms of the Provincial Water Quality Guidelines and Lake Trout habitat. Also completed a Fish Habitat Impact Assessment to inform the suitability of developing shoreline structures.
- ✦ *Town of Erin Urban Centre Wastewater Servicing Class EA (Ainley Group, 2017 - 2018).*
Conducted an impact assessment of proposed wastewater treatment and collection infrastructure on the natural environment in the Town of Erin. Documented baseline conditions of the terrestrial environment (wetland, forest and field habitat) and biological communities (amphibians, breeding birds, species at risk) through field surveys and desktop review, including the identification of significant natural heritage features and functions. Summarized findings, assessed sensitivities and potential impacts, and recommended mitigation measures and preferred alternatives to avoid adverse effects on the natural environment.
- ✦ *Haliburton Environmental Impact Study (2017) - Total Site Services*
Characterized natural heritage features, developed mitigation measures and assessed impacts associated with the construction of a lagoon in terms of municipal and provincial policy.
- ✦ *Stony Lake EIS Peer Review (2015 - 2016) - Friends of the Fraser Wetlands*
Assessed the viability of a proposed 60 condominium development on Stony Lake through an evaluation of impacts to various natural heritage features and related environmental policy.
- ✦ *Camel Lake Development Review (2015) - District Municipality of Muskoka*
Assessed the feasibility of a proposed development through a calculation of water quality impacts on a downstream lake that is considered to be at development capacity.

- ✦ *White Lake EIS Peer Review (2015) - Town of Mississippi Mills*
Reviewed the characterization of natural heritage features and associated impact evaluation in support of the addition of 160 trailer units on White Lake in relation to the Town's Official Plan and other relevant policy.
- ✦ *Lake Scugog Environmental Impact Study (2015) - Private Developer*
Initiated an EIS aimed at identifying opportunities and constraints to development through the completion of a total phosphorus budget and providing expertise in stormwater management.



Professional History

Hutchinson Environmental Sciences Ltd.

Senior Scientist
Bracebridge, ON
2014 – Present

North American Lake Management Society (NALMS)

Co-editor of NALMS peer-reviewed journal *Lake and Reservoir Management*
2020 - 2024

Canadian Aquatic Invasive Species Network and York University

Research Associate
2011 - 2014

Canadian Wildlife Federation

Research Consultant
2014

Canadian Wildlife Service

Research Consultant
2013 - 2014

Ontario Ministry of Natural Resources

Research Consultant
2011 – 2012

York University

Post-doctoral Fellow
2008 – 2011

Environment Canada

Research Consultant
2007 – 2012

Education

Ph.D. Evolutionary Ecology

Queen's University
1999 – 2005

M.Sc. Ecology

Queen's University
1994 – 1997

B.Sc. (Honours) Biology and Environmental Sciences

Trent University
1989 – 1993

Background

Andrea Smith has over 25 years of experience in ecology and environmental science, including research on aquatic invasive species, species at risk and climate change. She brings a multi-disciplinary perspective to her work, with extensive experience in both science and policy.

Andrea has conducted research to investigate the effects of human activity on aquatic and terrestrial ecosystems and species. She has experience in biodiversity monitoring, natural heritage assessment and environmental impact studies. Andrea has a strong aptitude for literature and peer review, scientific synthesis, technical writing, and policy review and analysis. She served as co-editor of the peer-reviewed scientific journal *Lakes and Reservoir Management* and is qualified as an expert witness for the Ontario Municipal Board and the Ontario Land Tribunal in the fields of environmental impact assessment and policy, ecology, species at risk, and significant wildlife habitat.

Recent Project Examples

Official Plan Review

- **Preparation of a New Official Plan for the Township of Lake of Bays (JL Richards, 2024 - ongoing).**
Reviewing and updating the natural heritage and natural hazard policies of the Township's Official Plan through background research and production of a discussion paper focused on characterizing Township natural heritage and natural hazards, summarizing applicable policy, and analyzing the current Official Plan to identify gaps and opportunities to strengthen policy. Also developing guidelines for environmental impact studies (EIS) to include as an Official Plan appendix to ensure greater consistency in the scope and quality of EIS submitted and to streamline the development review process.

Environmental Impact Assessment

- **Caledonia Wastewater Treatment Plant – Municipal Class Environmental Assessment (EA, Phases 3 and 4; JL Richards, 2022 - ongoing).**
Leading the natural heritage assessment for the determination of the preferred alternative to increase the capacity of the Caledonia Wastewater System. Coordinating field data collection, reporting, and project management. Conducting background review and correspondence with regulators, field work to characterize terrestrial and aquatic features and functions, and a sensitivity assessment to assess different servicing options as part of the impact assessment.

- **Nanticoke Water Treatment Plant Environmental Study Report (ESR) Addendum for Class EA (JL Richards, 2022 - ongoing).**
Leading the terrestrial and aquatic ecology component to extend the 2006 Class EA ESR for the proposed water treatment plant expansion. Conducting background review and field investigations to evaluate whether the 2006 ESR conclusions are still valid regarding the preferred alternative and associated mitigation measures. Consulting with provincial authorities to obtain necessary permits and authorizations for species at risk birds and snakes.
- **Environmental Constraints Analysis (Unidentified Municipality, 2021).**
Project manager for the constraints analysis, which included a background review and field investigations of ~300 ha property in central Ontario to establish the principles for residential development in the area. Identified high-level opportunities and constraints to development through assessment of natural heritage features and functions, including vegetation communities, species at risk habitat, significant wildlife habitat, wetlands, and aquatic habitat.
- **Deep Lake Water Cooling Supply Expansion Municipal Class EA (Enwave Energy Corporation, 2019 – 2021).**
Completed an Environmental Impact Study (EIS) for the proposed expansion of the cooling system by characterizing terrestrial natural heritage features and functions that could be impacted by construction of drop shafts and a water intake, and operation of the water intake and water outlet. Determined potential negative impacts of the project and recommended mitigation measures. Completed literature review to determine risk of invasive mussel infestation to intake infrastructure in Lake Ontario and to recommend prevention and control measures.
- **Town of Erin Urban Centre Wastewater Servicing Municipal Class EA (Ainley Group, 2017 - 2018).**
Conducted an EIS of proposed wastewater treatment and collection infrastructure on the natural environment in the Town of Erin. Documented baseline conditions of the terrestrial environment (wetland, forest, and field habitat) and biological communities (amphibians, breeding birds, species at risk) through field surveys and desktop review, including the identification of significant natural heritage features and functions. Summarized findings, assessed sensitivities and potential impacts, and recommended mitigation measures and preferred alternatives to avoid adverse effects on the natural environment.

Peer Review

- **Peer Reviewer for Various Municipalities**
Provide environmental consulting services to several municipalities in Ontario, including pre-consultation, terms of reference, and peer review of environmental impact studies, natural heritage evaluations, species at risk screenings, wildland fire hazard assessments, and associated environmental submissions submitted as part of development applications (e.g., applications for consent, minor variance, zoning by-law amendment, draft plan of subdivision, site plan control), and provide expert testimony for litigation and Ontario Land Tribunal proceedings.
 - **Town of Bracebridge (2024 – ongoing)**
 - **Town of New Tecumseth (2023 – ongoing)**
 - **Township of Clearview (2022 – ongoing)**
 - **Township of Georgian Bay (2021 – ongoing)**
 - **District Municipality of Muskoka (2020 – ongoing).**

Species at Risk

- **Status Reports on Wildlife Species in Canada (Committee on the Status of Endangered Wildlife in Canada [COSEWIC], Environment Canada, 2007, 2010 – 2011, 2015 - 2019).**
Assessed the conservation status of wildlife species in Canada by compiling and synthesizing information on their biology, distribution, habitat, population dynamics, and threats. Research involved reviewing peer-reviewed and grey literature and monitoring data, as well as consulting with government, conservation, and

Indigenous organizations. To date have prepared six status reports (on marine and freshwater fish, and shorebird and grassland birds).

- **Critical Habitat Effective Protection Assessments (CHEPAs), Ontario (Canadian Wildlife Service, Environment Canada, 2013 – 2014).**

Conducted CHEPAs for 10 federal species at risk (vascular plants and birds) in Ontario. Work involved evaluating the extent of critical habitat protection for species at risk on non-federal lands using a risk tolerance assessment process. Reviewed and summarized recovery planning documents, threats to critical habitat, land tenure and management, conservation measures and federal and provincial legislation, policy, guidelines, and best management practices.

Aquatic Invasive Species

- **Aquatic Invasive Species National Status Report Card (Canadian Wildlife Federation, 2014 – 2015).**

Prepared a status report card on how well Canada is addressing key pathways of introduction and spread through legislation, policy and stewardship initiatives. Work involved modifying 90-page draft report into report card format by revising, researching gaps, and writing.

- **Review of Ballast Water Regulations and Policy in Canada and Implications for the Introduction and Spread of Aquatic Invasive Species in Arctic Waters (Kivalliq Inuit Association, 2014).**

Reviewed existing regulations and policy to evaluate their effectiveness in minimizing the threat of aquatic invasions via commercial shipping to Canada's Arctic and made recommendations on best practices that could be required for ship traffic operating in the North.

- **Current Prevention and Management Approaches for Aquatic Invasive Species in Jurisdictions outside Alberta (Alberta Water Council, 2014).**

Conducted a jurisdictional review of aquatic invasive species prevention and management programs in six North American jurisdictions to identify strengths and weaknesses of approaches, as well as opportunities and lessons learned. Research involved development of a questionnaire, telephone surveys and literature review.

Watershed Management and Water Quality

- **Recreational Water Quality Policies and Causation Studies Update (District Municipality of Muskoka, 2023).**

Conducted a review of jurisdictional approaches to shoreline management in six jurisdictions across Canada (in British Columbia, Nova Scotia, and Ontario) to inform recommended changes to the District's Lake System Health Program and related recreational water quality policies within the District's Official Plan.

- **Watershed Health Indicators for the Muskoka River Watershed (District Municipality of Muskoka, 2022 – 2023).**

Conducted research and community consultation to identify the environmental and ecological metrics needed to support the implementation of Integrated Watershed Management. Work included documenting the current state of the watershed and reviewing watershed health indicators used in other jurisdictions to determine metrics and monitoring approaches best suited for the Muskoka River Watershed. Identified a longlist and shortlist of indicators to use to monitor watershed health in Muskoka.

- **Developing a Framework for Watershed Plan Recommendations (Lake Simcoe Region Conservation Authority, 2022 – 2023).**

Conducted research and consultation with conservation authority staff to develop a framework to guide future watershed plan recommendations. Work involved the identification of goal and objective statements, and associated indicators and targets, related to watershed health through literature review, jurisdictional scans, and workshops.

- **Foreshore Integrated Management Planning (FIMP) in Alberta (Living Lakes Canada, 2022).**

Conducted a review of resources available to support the expansion of the FIMP program into Alberta. Developed annotated lists of environment-related legislation, policies, and best management practices.

- **Shoreline Preservation Review and Consultation (County of Haliburton, 2021 - 2022).**
Conducted a literature review of the current science and best management practices for shoreline preservation and the role of natural shorelines in protecting water quality and aquatic habitat. Consulted with stakeholders to identify issues of concern. Research was used by the County to develop a Shoreline Preservation By-Law.
- **Lac La Biche Sensitive Habitat Inventory Mapping Project, Alberta (Living Lakes Canada, 2017).**
Identified and mapped sensitive shoreline habitat features to inform sustainable shoreline development through Aquatic Habitat Index, Activity Risk Table and Shoreline Management Guidelines.

Plain Language Communication

- **Plain Language Report for the Northwest Territories Community-Based Water Quality Monitoring Program (Government of the Northwest Territories, 2023).**
Produced a plain language summary report of the technical 10-year program review of water quality monitoring in the Mackenzie River Watershed. The report was written for 21 communities in the watershed and focused on major factors affecting water quality over time and space, and an evaluation of the effectiveness of the monitoring program.
- **Peel Climate Change Vulnerability Assessments – Summaries for Decision-Makers (Toronto and Region Conservation Authority, 2016 - 2018).**
Summarized technical reports (ranging in length from 100-200 pages) into summary documents (10-15 pages) for municipal decision-makers and key stakeholders. Reports addressed the vulnerability to climate change of agricultural production, community services and assets, water infrastructure, and natural systems in Peel Region.

Certifications and Skills Development

- 2020 *Introduction to R for Aquatic Research – Beginner and Advanced Workshops*, North American Lake Management Society
- 2018 *Environmental DNA (eDNA) – An Emerging Tool for Monitoring Past and Present Biodiversity*, Technical Education Webinar, Maxxam Analytics
- 2017 *Emergency First Aid*, St. John's Ambulance Canada
- 2016 *Project Management Professional Training*, LearningBrite Technologies
- 2015 *Natural Heritage Information Centre Data Sensitivity Training*, Ontario Ministry of Natural Resources and Forestry



Jason Ferrigan MSc.PI, RPP, MCIP

Principal Associate;
Chief Planner

Education

Fellow, Northern Leadership Program, 2015

Master of Science in Planning,
University of Toronto, 1998

Bachelor of Arts, Honours,
Laurentian University, 1996

Employment History

2023 to Date: J.L. Richards & Associates Limited – Principal Associate; Chief Planner

2022 to 2023: J.L. Richards & Associates Limited – Associate; Senior Planner

2020 to 2022: J.L. Richards & Associates Limited – Senior Planner

2015 to 2020: City of Greater Sudbury – Director of Planning

2015: Laurentian University – Director of Planning and Capital Projects

2008 to 2015: City of Greater Sudbury – Senior Planner

2006 to 2010: Laurentian University – Sessional Instructor, Geography Department

2005 to 2008: Ministry of Municipal Affairs and Housing – Planner

Professional Associations/ Memberships

Ontario Professional Planners Institute (OPPI), Registered Professional Planner (President 2017 to 2019, President Elect 2015 to 2017)

Ontario Representative Canadian Institute of Planners (CIP), Member

Qualifications & Expertise

Jason is a Principal Associate and Chief Planner with 25 years of progressive experience in the private, public, institutional, and not-for-profit sectors. Jason is responsible for the daily management of the firm’s Planning and Geographic Information System (GIS) staff, ensuring the proper allocation of work to achieve the optimal delivery of projects to clients. He is a proven leader who believes strongly in creating high-trust environments to empower and drive innovation and action and is driven to achieve balance between competing interests and create positive change.

Jason has successfully managed a wide range of complex and challenging assignments across Ontario, Quebec, the United States, and the Caribbean. His experience spans the full spectrum of planning—from idea to implementation—including visions, master plans, design guidelines, planning policies, site studies, development approvals, competitions, and construction.

Representative Project Experience

Planning Director: City of Greater Sudbury, Various. Led a 40+ person team that provided long range planning, development approval/engineering, and environmental planning services across a 3,600 km² area. Developed and secured approval for annual business plan and budget. Directed strategic policy studies, such as the Official Plan Review, Cost of Growth Study, Downtown Community Improvement Plan, Affordable Housing Strategy, Community Energy and Emissions Plan, and Enterprise GIS Strategy. Served as Principal Planning Advisor and Spokesperson.

Planning Director: Laurentian University, Various. Led a six-person team that delivered more than \$100M in capital projects (i.e., Sudbury Campus Modernization, McEwan School of Architecture). Also pursued \$100M in projects, including Barrie Campus Master Plan, Sudbury Campus Arena, and Student Centre.

Senior Planner and Planner: Led or contributed to official plans for the cities of Greater Sudbury, North Bay, Timmins, Elliot Lake, and Brantford, the Township of Johnson, Bruce Mines/Plummer Additional, and St. Joseph Island Planning Boards, and Government of Barbados.

Senior Planner and Planner: Led or contributed to strategic plans and projects, such as the Downtown Sudbury Master Plan and Community Improvement Plan, Market Square Relocation, Elgin Greenway, Sudbury Brownfield Strategy and Community Improvement Plan, Bridgepoint Health Master Plan, University of Waterloo Research and Technology Park Master Plan and Design Guidelines, and the Ontario Urban Economic Development Tool Study.

Senior Planner and Planner: As a Consulting Planner, led land-use planning approvals for the Bridgepoint Health Master Plan, University of Waterloo Research and Technology Park, Wellesley Hospital Redevelopment, Children’s Aid Society of Toronto Head Office, and DuPont Canada. As a public planner, analyzed and made recommendations on various files including an 800-unit residential intensification project.



Kris Kerwin C.Tech.

Senior Geographic Information Systems Technician

Education

Geographic Information Systems Technologist, Algonquin College of Applied Arts and Technology, 1998

Employment History

2019 to Date: J.L. Richards & Associates Limited – Senior Geographic Information Systems Technician

2001 to 2019: J.L. Richards & Associates Limited – Geographic Information Systems Technician

1998 to 2001: Former City of Nepean – GIS Technologist / Draftsman

Professional Associations/ Memberships

Ontario Association of Certified Engineering Technicians and Technologists (OACETT)

Qualifications & Expertise

Kris is the Senior Geographic Information Systems (GIS) Technician with the firm who specializes in the development and integration of GIS for municipal and private sector clients, with an emphasis on using GIS as a data analysis and visualization tool. Some of Kris’s GIS-related responsibilities include data capture, data conversion, database design, Lidar integration analysis, photographic survey and photo3D visualization, GIS analysis, custom online applications, and integration of data from third parties.

Kris has significant experience developing online applications using ESRI ArcGIS Online. Applications include field collection programs using ArcGIS Field Maps and Survey123 and developing user friendly public and private customized browser-based web mapping applications to support municipal and private clients. Kris is also responsible for developing LiDAR based 3D and digital twin models to help visualize GIS data and integrate multidisciplinary datasets.

Kris is also directly involved with planning division projects, including Official Plan and Zoning By-law mapping, Site Plans, Draft Plans of subdivision, Land Use Surveys, and various other plans and representative map products. His planning division role is to provide a verity of planning services and support for private sector and municipal clients by organizing and analysing data and producing enhanced, user-friendly maps and graphics. These documents are integral in sharing information with the clients and obtaining approvals for development and other city-building initiatives.

Representative Project Experience

GIS Lead: The Clay Belt Agricultural Developmental Project

GIS Technician/Project Manager: Ottawa International Airport Authority, Infrastructure Management GIS

GIS Technician: Trout Lake Watershed Study and Management Plan

GIS Technician: Smooth Rock Falls Waterfront Master Plan

GIS Technician/Project Manager: Municipality of Mississippi Mills, Municipal GIS Services

GIS Technician: AECL Chalk River Site Service Line Assessment Project

GIS Technician: Township of Bonnechere Valley, Integration of Infrastructure Data with Public Works Maintenance Management Software



Sarah Vereault M.P.I., RPP, MCIP

Associate;
Senior Planner;
Practice Lead, Northern & Central Ontario

Education

Master of Planning,
Dalhousie University, 2008

Bachelor of Science, Honours,
McGill University, 2006

Employment History

2024 to Date: J.L. Richards & Associates
Limited – Associate; Senior Planner;
Practice Lead, Northern & Central Ontario

2021 to 2024: J.L. Richards & Associates
Limited – Associate; Senior Planner

2010 to 2021: J.L. Richards & Associates
Limited – Planner

2008 to 2010: Defence Construction
Canada, Halifax – Project Assistant

2007: Halifax Regional Municipality –
Planning Intern

Professional Associations/ Memberships

Canadian Institute of Planners (CIP),
Member

Ontario Professional Planners Institute
(OPPI), Registered Professional Planner

Qualifications & Expertise

Sarah is responsible for providing a variety of planning services to municipalities and private sector clients. Her regular tasks include review and preparation of planning applications, liaison with approval authorities, and assistance with environmental assessments and other processes involving public input.

Sarah has experience as a development, land use, and policy planner, undertaking background research, site analysis, public consultation, and presentations to clients and stakeholders. Sarah has worked on Official Plans, Zoning By-laws, and Community Improvement Plans for several Northern Ontario municipalities and has completed development plans for a variety of sites, including commercial, institutional, industrial, military, waterfront, and mixed-use properties.

Sarah has excellent public speaking and communication skills, and has given several presentations to Federal Departments, Municipal Councils and Planning Committees, project stakeholders, and management. She has experience in public consultation and is familiar with various engagement techniques.

Representative Project Experience

Senior Planner; Project Manager, Planning Advisory Services: City of Elliot Lake, Town of Espanola, Township of Coleman, Township of Nairn and Hyman, Township of Terrace Bay, and Township of Matachewan

Senior Planner; Project Manager, Official Plans: Sudbury East Planning Board Official, Town of Iroquois Falls, Township of Hornepayne, and Township of McGarry

Planner, Official Plans: Town of Northeastern Manitoulin and the Islands, Township of Matachewan, City of Elliot Lake, Town of Espanola, and Town of Smooth Rock Falls

Senior Planner; Project Manager, Zoning By-laws: Manitoulin Planning Board, Township of Billings, Township of Gordon/Barrie Island, Town of Gore Bay, Town of Kirkland Lake, Township of Hornepayne, and Town of Iroquois Falls

Senior Planner; Project Manager, Community Improvement Plans: City of Elliot Lake, Town of Iroquois Falls, and Town of Kirkland Lake

Planner, Environmental Assessments: Goldcorp Borden MTO Class EA; City of Greater Sudbury Lively Walden Wastewater Treatment System Class EA; Town of Espanola Light Industrial Park EA Amendment and Official Plan Amendment; and Town of Mattawa Light Industrial Park EA and Rezoning

Senior Planner, Development Approvals: Toromont CIMCO, Halton Hills (Official Plan Amendment, rezoning, site plan for 7,850 m² industrial facility); Toromont, Bradford West Gwillimbury (site plan for 12,750 m² industrial facility); New Protein Global, Sarnia (Official Plan Amendment, rezoning, site plan for 12,750 m² industrial facility); Conseil Scolaire Catholique des Grandes Rivieres, various locations (site plans and minor variances for school facilities); Centre de Sante, Timmins (site plan and minor variance for 1,000 m² health care facility)



David Welwood

MES (Planning), RPP, MCIP

Senior Planner;
Practice Lead, Northern & Southern
Ontario

Education

Project Management for Planners, OPPI,
Spring 2019

Planner at the Ontario Municipal Board,
OPPI, Spring 2012

Master of Environmental Studies
(Planning), York University, 2010

Bachelor of Education,
Queen's University, 2008

Bachelor of Arts, Honours,
Trent University, 2007

Employment History

2024 to Date: J.L. Richards & Associates
Limited – Senior Planner; Practice Lead,
Northern & Southern Ontario

2022 to 2024: J.L. Richards & Associates
Limited – Planner

2019 to 2022: Region of Waterloo –
Principal Planner

2014 to 2019: Ministry of Municipal Affairs
and Housing – Planner

2018 to 2019: Ministry of Municipal Affairs
and Housing – Acting Team Lead

2010 to 2014: Tunnock Consulting Ltd. –
Planner

Professional Associations/ Memberships

Ontario Professional Planners Institute
(OPPI), Full Member

Canadian Institute of Planners (CIP),
Full Member

Qualifications & Expertise

David is a bilingual (English/French) Senior Planner and Practice Lead with experience in provincial, municipal, and private sector planning roles. He has developed strong relationships with stakeholders across Ontario and has a comprehensive knowledge of Ontario's land use planning system, including a long experience with the development of municipal land use policy, as well as the review of Planning Act applications. David is a qualified witness before the Ontario Land Tribunals.

David has contributed to the development and approval of numerous official plans, zoning by-laws, community improvement plans, reports, and planning studies across Ontario. He has coordinated public meetings required by the Planning Act, has led core team meetings, and has delivered presentations and training for municipal councils and staff on various planning matters, including the review of planning applications.

David has reviewed and made recommendations to elected municipal Councils on planning applications, such as plans of subdivision, condominiums, zoning by-law amendments, consents, minor variances, and Minister's Zoning Orders.

Representative Project Experience

Principal Planner: Region of Waterloo. Led the Region's review of various Planning Act applications for lower tier municipalities throughout Waterloo Region to ensure conformity with the Regional Official Plan and provincial planning policies. Coordinated the Region's review and approval process of lower-tier statutory official plan reviews and coordinated the Region's review of complex Aggregate Resources Act applications. Managed the approval process for two Regional Official Plan amendments.

Planner: Ministry of Municipal Affairs and Housing. Coordinated the Provincial review and approval process for numerous official plans and official plan amendments to ensure consistency with the Provincial Policy Statement. Met with municipal elected councils and staff to deliver training on provincial interests in land use planning. Handled negotiations for required provincial modifications to municipal official plans. Made various presentations to municipal Councils including post-election Council training sessions.

Acting Team Lead: Ministry of Municipal Affairs and Housing. Mentored staff in the review of Planning Act applications, Official Plan Reviews, and Minister's decision packages and briefing notes. Led provincial training opportunities, such as the Ministry's 2018 Northeastern Ontario Planning Authorities Technical Workshop and Bill 139 training sessions.

Planner and Senior Planner: Developed official plans and zoning by-laws for municipalities across northern and eastern Ontario and provided contract land use planning services to municipalities. Organized public meetings and gave presentations on the review of Planning Act applications and statutory reviews of official plans and zoning by-laws.



APPENDIX C

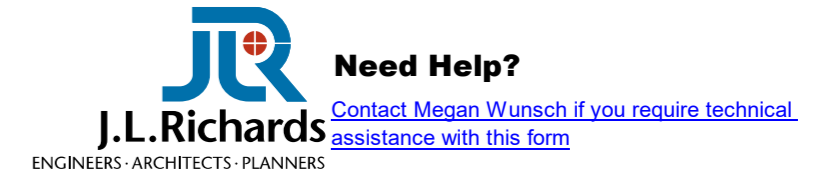
+ Project Schedule



APPENDIX D

+ Time Task Matrix

Project: Whitestone OP and Zoning Update Principal: Jason Ferrigan Total Budget \$ 121,949.50
 Client: Municipality of Whitestone JLR PM: David Welwood
 JLR #: 33316 Rev.: 0



Estimated Engineering Fee

	J.L. Richards & Associates Limited				Inson Environmental Sciences				Total Hours	Total Cost
	Project Delivery	Planning	Planning	Planning	Sub-Consultants	Sub-Consultants	Expenses	Expenses		
	Principal	Project Manager/Senior Planner	Planner	Senior GIS Technologist	5%	5%	Mileage	Travel		
	Jason Ferrigan	David Welwood	Soumaya Ben Miled	Kris Kerwin	Brent Parsons	Andrea Smith				

Phase 1: Background Review and Study	Other
1.1 Client Kick-Off Meeting (virtual)	
1.2 Request Background Data from MMAH	
1.3 Request Background Data from West Parry Sound Geography Network (WPSGN)	
1.4 Pre-consultation with MMAH (virtual)	
1.5 Preliminary Work Plan and Public Consultation Plan	
1.6 Client Meeting: Review Detailed Work Plan and Public Consultation Plan (virtual)	
1.7 Early consultation with Indigenous Communities (1 meeting, in-person)	
1.8 Special Meeting of Council (s.26, Planning Act) (in-person)	
1.9 Public Engagement Survey 1	
1.10 Technical review of existing Official Plan and Zoning By-law	
1.11 Preparation of a Digital Base Map	
Phase 2: Policy Directions	
2.1 Background Information Review	
2.2 Prepare Draft Background and Policy Direction Report	
2.3 Natural Heritage and Lake-Specific Policies Report	
2.4 Meeting with Municipal Staff (virtual)	
2.5 Present Draft Background and Policy Direction Report to Council (virtual)	
2.6 Public Engagement Survey 2	
2.7 Focus Groups (in-person)	
2.8 Public Information Centre (in-person)	
2.9 Council Update (virtual)	
Phase 3: Draft Official Plan	
3.1 Prepare Draft Redline Changes to Official Plan	
3.2 Staff Consultation on Draft Documents (Virtual)	
3.3 One Window Early Consultation with MMAH (Virtual)	
3.4 Meeting with Municipal Staff to Discuss MMAH One Window Early Consultation Comments (virtual)	
3.5 Prepare Draft Official Plan Amendment	
3.6 Statutory Public Open House (in-person)	
3.7 Maintain Record of Public Comments	
Phase 4: Final Official Plan	
4.1 Prepare Public Meeting Report	
4.2 Statutory Public Meeting* (in-person)	
4.3 Update Official Plan per comments received	
4.4 Present Final Draft Official Plan Amendment and Zoning By-law Amendment to Council for adoption (Virtual)	
4.5 Submit adopted Official Plan to MMAH	
Phase 5: Zoning By-law Update	
5.1 Prepare Draft Redline Changes to Zoning By-law	
5.2 Staff Consultation on Draft Documents (Virtual)	
5.3 Prepare Draft Zoning By-law Amendment	
5.4 Statutory Public Open House (in-person)	
5.5 Prepare Public Meeting Report	
5.6 Statutory Public Meeting (in-person)	
5.7 Update Zoning By-law per comments received	
5.8 Present Final Zoning By-law Amendment to Council for adoption (Virtual)	
5.9 Consolidate Official Plan and Zoning By-law, and Provide GIS Dataset to WPSGN	
5.10 Debrief and Closure Meeting with Municipal Staff	
Mapping	
1.3 Request Background Data from West Parry Sound Geography Network, Municipality, and Province	
1.11 Preparation of a Digital Base Map	
2.2 Prepare Schedules for Draft Background and Policy Direction Report	
3.1 Prepare Draft Schedule Changes to Official Plan	
4.3 Prepare Final Official Plan Schedules	
5.1 Prepare Draft Schedule Changes to Zoning By-law	
5.7 Prepare Final Zoning By-law Schedules	
5.9 Consolidate Official Plan and Zoning By-law Schedules, and Provide GIS Dataset to WPSGN	

BREAKDOWN SUMMARY	
Phase 1: Background Review and Study	\$ 21,796.75
Phase 2: Policy Directions	\$ 31,163.25
Phase 3: Draft Official Plan	\$ 22,296.50
Phase 4: Final Official Plan	\$ 6,304.00
Phase 5: Zoning By-law Update	\$ 20,439.00
Mapping	\$ 19,950.00
Total Hours Budgeted	
Total Cost Budgeted	\$ 121,949.50

% of Total Project Budget		
	\$ 129,115.19	Total Engineering Cost + 7% Admin M
	\$ 16,784.97	HST
	\$ 145,900.16	Total Engineering Cost + 7% Admin M

[See Guideline on Admin Fees for more in](#)

Discipline Budget Breakdown	
Project Delivery	\$ 2,362.50
Planning	\$ 98,052.50
Sub-Consultants	\$ 19,582.50
Expenses	\$ 1,952.00
Totals:	\$ 121,949.50



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REQUEST FOR PROPOSAL:

RFP-2024-09

Official Plan Five Year Review &
Comprehensive Zoning By-Law Update

Municipality of Whitestone

21 Church Street, Dunchurch, ON P0A 1G0

File no. 23217N

RFP-2024-09 PROPOSAL

5, September 2024



Your Vision
Designed | Planned | Realized



PLANNING
URBAN DESIGN
& LANDSCAPE
ARCHITECTURE

MHBC - MacNaughton Hermesen Britton Clarkson Planning Limited

113 Collier Street Barrie, ON L4M 1H2

T: 705 728 0045

F: 705 728 2010

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September 5, 2024

Michelle Hendry
CAO/Clerk
21 Church Street
Dunchurch, ON P0A 1G0

VIA EMAIL: michelle.hendry@whitestone.ca

Dear Ms. Hendry;

**RE: MHBC Proposal for RFP-2024-09: Official Plan Five Year Review & Comprehensive Zoning By-law Update
OUR FILE 23217N**

MHBC appreciates the opportunity to provide a detailed proposal for the Official Plan five year review and Comprehensive Zoning By-law update for the Municipality of Whitestone. Our firm's experience provides us with an in-depth understanding of the economic, social, environmental and cultural issues that face small urban and rural communities in Northern Ontario. Jamie Robinson and Kathy Suggitt have vast experience working in Municipalities in Northern Ontario, and understand the unique Planning needs of the Municipality of Whitestone. Our team currently provides the Municipality with day to day planning consultant services.

The form prescribed to be included and authorized by MHBC have been attached to this proposal as referenced in the Request for Proposal.

Yours truly,

MHBC

Jamie Robinson, BES, MCIP, RPP | Partner

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1.0 INTRODUCTION

1.1 PROJECT UNDERSTANDING

The Municipality of Whitestone is located within the Parry Sound District with a population of 1,100 year-round residents and up to 5,000 seasonal residents. Only two and a half hours north of Toronto, Whitestone is roughly 950 square kilometres and is generally referred to as “cottage country”.

The Municipality’s current Official Plan was enacted by Council in October of 2014, and approved by the Ministry of Municipal Affairs and Housing in April of 2015. There have been two amendments to the Official Plan since its adoption. The Municipality’s current Zoning By-law was passed in February 2018, with amendments in March 2021 and December 2022.

The Planning Act requires that the Municipality’s Official Plan be updated every 10 years. The *Planning Act* also requires that the Municipality’s Zoning By-law be updated within three (3) years of Official Plan approval to reflect the new policy and regulations, and to address emerging trends and issues.

An Official Plan is a key policy document adopted by a Municipality to guide long-term development and use of land. It outlines the vision, goals and policies that will direct future growth, land use, housing, infrastructure, transportation and environmental management over a 20-year period.

A Zoning By-law is the tool that implements the Official Plan’s goals, objectives and policies through rules and regulations that control the use of land. Under the regulatory framework provided by Section 34 of the Planning Act, Zoning By-laws regulate:

- How land may be used;
- Where buildings and other structures can be located;
- The types of buildings that are permitted and how they may be used; and
- The lot sizes and dimensions, parking requirements, building heights and setbacks from the street.

In undertaking this project, MHBC will develop an updated Municipality of Whitestone Official Plan that is consistent with the new Provincial Planning Statement (2024), the *Planning Act* and other regulatory requirements. Upon completion and adoption



of the Official Plan by Council, MHBC will begin development of an updated Zoning By-law that implements the new Official Plan (as prescribed within the *Planning Act*) and responds to the changing nature of development within the Municipality.

The updated Official Plan and Zoning By-law will achieve the following, as outlined in the request for proposal document:

- Address issues and inconsistencies with the existing Official Plan;
- Review and refinement of the population projections;
- Examination of residential growth strategies in the Settlement Areas;
- Review and enhancement of the natural environment policies;
- Development of Green House Gas reduction and Climate Change strategies;
- Promotion of Whitestone as a livable, four season community;
- Ensure that the Municipality's Asset Management Plan is considered and reflected in the new policy framework;
- Review and enhancement of the Official Plan schedules;
- Review of policies related to the Landfill Impact Area; and
- Review of lake specific policies.

MHBC will work collaboratively with Staff, Council and the community to ensure that the updated Official Plan and subsequent Zoning By-law update are strategically developed within the context of the Municipality's goals and objectives in order to provide a long-term zoning plan for the Municipality, while ensuring that development aligns with the policies of the updated Municipality of Whitestone Official Plan and other governing legislation.

1.2 WHAT CAN WE OFFER

We have 50 years of experience working with Ontario municipalities to successfully develop new and updated Official Plans and Zoning By-laws. Our approach is premised on a collaborative planning model. We are of the view that the process is as important as the product that emerges. To be effective, both the Official Plan and the Zoning By-law must be developed in conjunction with the communities it serves. Our role is to ensure that the process is inclusive, engaging and constructive, and results in planning documents that have a broad base of support from the community they serve.

Our team has extensive experience in preparing Official Plans and Zoning By-laws. We have prepared Official Plans and Zoning By-laws for over 50 municipalities in Ontario. We have worked with a broad spectrum of municipalities ranging in population sizes from 1,200 to over 300,000 and have experience with communities that have dynamic seasonal population bases, agricultural and rural land uses,



resource activities and variable income levels. Our municipal planning experience provides us with an in depth understanding of the economic, social, environmental and cultural issues facing communities across Ontario. We are acutely aware of the development pressures facing many municipalities. We understand the need to provide an Official Plan that reduces barriers to new investment and growth while safeguarding the resources that encompass the character of the area and a Zoning By-law that is the tool to implement the updated Official Plan.

MHBC also has solid expertise in community engagement. We subscribe to the notion of engagement rather than consultation and we believe strongly in the value of inclusion, respect, responsibility and shared decision making. Our approach is to go where the people are and to engage in conversations that matter.

MHBC currently provides planning services to numerous municipalities including the Township of Tiny, Township of Scugog, Municipality of Magnetawan, Municipality of Sioux Lookout, Town of Moosonee, Township of Nipissing, Township of Machar, City of Dryden, Municipality of Temagami, Township of Strong and Township of Seguin. MHBC also currently provides planning services to the Municipality of Whitestone.

We recognize that there is not a “one size fits all” approach to planning, and that planning issues vary across municipalities. We anticipate that some of the issues to be addressed in the preparation of the Municipality of Whitestone’s updated Official Plan and Zoning By-law will include:

- Ensuring the Municipality’s policies have regard for Provincial Interest;
- Implementing changes required under the *Planning Act* and as a result of updated Provincial policies;
- Ensuring consistency with the new Provincial Planning Statement (2024); and
- Ensuring conformity with the Northern Growth Plan.

In order to accomplish the above, we believe that the Municipality requires a professional team that:

- Has experience conducting Official Plan and Zoning By-law Reviews;
- Has experience in both urban and rural communities, including municipalities with a significant seasonal population;
- Has dealt with planning policies related to shorelines, including floodplain/erosion hazards;
- Has developed and implemented industry leading Official Plan policies and Zoning By-law definitions;
- Can work with all municipal departments to gather and provide timely and accurate information useful in the update projects;



- Has developed and implemented effective community engagement strategies and can tailor the approach to encourage stakeholder participation and ensure that input is valued and given appropriate consideration;
- Are experienced facilitators in implementing efficient engagement strategies;
- Has a strong understanding of the Municipal Act, Planning Act, the Provincial Planning Statement, and other Provincial Plans;
- Has industry leading, in-house CAD and GIS capabilities to produce mapping and schedule documents that are compatible with the GIS and online viewing software (if required);
- Has experience defending Official Plans and Zoning By-laws on behalf of the municipalities at the Ontario Land Tribunal and is keeping current on regulations, rules and procedures related to the Ontario Lands Tribunal; and,
- Is able to complete the project as outlined in the proposal.

MHBC has the requisite experience needed to not only meet the needs of the Municipality, but to exceed its expectations.

2.0 COMPANY BACKGROUND, EXPERIENCE AND QUALIFICATIONS

2.1 MHBC PLANNING



MacNaughton Hermsen Britton Clarkson Planning Limited (MHBC) has been delivering a full range of planning services for 50 years since the company was founded in 1973.



Our firm is headquartered in Kitchener, Ontario, with over 100 Staff in five offices located within Southern Ontario and the Greater Toronto Area including Barrie, Vaughan, London, Kitchener and Hamilton. This project will be conducted out of the Barrie Office.

The varying scope and geographic extent of our projects has provided us with the opportunity to develop an approach that incorporates detailed research, analytical review and consultation, and to develop balanced and creative solutions for both private and public sector clients. As a result, MHBC has been recognized by the Ontario Professional Planners Institute (OPPI) with two awards of Professional Merit, two Southwest Ontario Awards of Professional Merit, and a Province of Ontario Outstanding Planning Award. Please see **Appendix 1** for a full company profile.

MHBC has provided planning services to municipalities throughout Ontario on a range of community level planning projects including Official Plan Reviews, comprehensive Zoning By-laws, secondary plans, community improvement plans, urban design policies and guidelines, source water protection plan implementation, economic and industrial strategies, heritage conservation district plans, growth management and intensification strategies and others.

As consultants for both municipalities and private developers, we understand the need to balance the interests of the public. We understand it is important to ensure that lands are adequately protected by imposing appropriate development standards while ensuring that the development industry and the public have certainty about what they can do on their property.

In recent years, MHBC has completed several Official Plan Reviews including for the Township of Tiny, Township of Nipissing, Municipality of Sioux Lookout, Township of Severn, and the Municipality of Temagami. As well we have completed Comprehensive Zoning By-laws for municipalities such as the Township of Seguin, Township of Georgian Bay, City of Orillia, Town of Bradford West Gwillimbury, Township of Scugog, Township of Nipissing, Municipality of Sioux Lookout and the Township of Georgian Bluffs. In addition, MHBC has also provided peer-review advice to municipalities that have conducted their Zoning By-law reviews internally. This work has enabled us to develop contemporary Zoning By-law provisions that are enforceable in a court of law. This balance is important for the Municipality who is tasked with implementing the Zoning By-law and for the residents of the community who must understand the rules and regulations for development.

MHBC has an industry leading in-house GIS department which sets our team apart from other firms. Our experienced and knowledgeable technical staff can complete any municipal mapping project using ArcGIS and AutoCAD. To prepare effective and comprehensive municipal studies we rely on the services of our expert staff to prepare land summaries, lot supply information, and designated land inventories. Our



technical team is available to provide advice to the team in completing the mapping exercise.

2.2 KEY TEAM MEMBERS



Jamie Robinson, BES, MCIP, RPP, is a Partner with MHBC and will be the Project Manager. Jamie will ensure strict adherence to the project tasks, budget and timeline. Jamie was born and raised in North Simcoe County and is intimately familiar with planning issues in the County. Jamie is a graduate of the University of Waterloo and is a policy and zoning expert with MHBC. He has over 20 years of experience as a consulting planner and has extensive experience managing municipal planning exercises and consulting teams. Jamie is familiar with the planning framework in central Ontario and currently provides in-house planning consulting services several municipalities. Jamie will be responsible for providing expert testimony in defence of the Official Plan or Zoning By-law in the event of an appeal.

He has also completed Official Plans for the Township of Tiny, Township of Nipissing, Municipality of Sioux Lookout, Township of Severn, and the Municipality of Temagami, and recent Zoning By-laws for the Township of Georgian Bay, Township of Nipissing and the Municipality of Sioux Lookout.

A copy of Jamie's CV can be found in **Appendix 3**.



Kathy Suggitt, M.PI, RPP, MCIP, is an Associate with MHBC and will serve as the Project Lead and Policy Planner for the project. Kathy has been one of the most respected planners in the County of Simcoe area for the past 20 years. Kathy was the Director of Planning and Development for the City of Orillia, the Manager of Policy Planning at the County of Simcoe, and the Manager of Strategic Initiatives, Policy and Analysis at the City of Barrie.

During these work experiences, Kathy was responsible for the preparation and/or oversight of the City of Orillia Official Plan, the County of Simcoe Official Plan, and the City of Barrie growth management exercise and draft new Official Plan, along with the review and approvals of various Official Plans and Amendments for many of the County of Simcoe local municipalities.



Kathy's role will include drafting the new Official Plan and ensuring that the new Official Plan is in keeping and consistent with Provincial policies, legislation and initiatives.

A copy of Kathy's CV can be found in **Appendix 3**.

PLANNERS, MHBC has several Planners with various levels of experience that can assist with the review and updates as required. This bench strength is a key factor in MHBC's ability to deliver timely and cost-effective professional planning services.

PLANNING TECHNICIANS, MHBC has several GIS professionals that will assist in the preparation of mapping documents. Our Certified Planning Technicians work closely with the planning team to develop any maps or visuals that may be required. MHBC's Planning Technicians are proficient in AutoCAD and GIS platforms and have experience preparing Official Plan and Zoning By-law schedules for numerous municipalities. Our technicians are available to advise the project team as required.

Our experienced Project Team offers the following advantages to the Municipality of Whitestone:

- A project team with extensive municipal and private sector planning experience;
- Variable personnel to ensure an appropriate level of service and rates can be applied based on the complexity of the task;
- A high degree of personal service and commitment by the project team;
- A proven track record of working with municipal staff, committees, stakeholder groups and the public in the successful completion of municipal projects;
- An understanding of the unique opportunities that face communities in the central and northern parts of Ontario;
- A proven track record of supporting municipalities that are similar in population and location to the Municipality;
- Extensive experience working in Central and Northern Ontario has enabled our staff to develop a strong understanding of local and regional issues and the unique dynamics associated with businesses, community stakeholders and permanent and seasonal residents; and,
- A project team that is available to assist municipal staff at all times (unlike with smaller firms, there will always be someone available to provide professional advice to municipal staff because of our staff complement).

We also note that the members of our firm have prepared numerous Official Plans and Comprehensive Zoning By-laws in municipalities throughout Ontario, as outlined in **Appendix 2**. During the course of preparing these plans, we have dealt with a



wide variety of planning issues including housing and growth management, planning for economic opportunities, industry development, community development and shoreline issues. We believe that this experience has provided us with a thorough understanding of the planning needs in northern communities. We are confident that we can provide the Municipality of Whitestone with the more qualified project team members that have experience providing municipal planning services in Central and Northern Ontario.

3.0 PROJECT METHODOLOGY

3.1 APPROACH

MHBC has prepared a work plan based on our understanding of the needs of the Municipality, and the requirements of the Province and our experience undertaking similar projects for other municipalities in the Province. We have reviewed the project timeline in the proposal and note that the first stage (being the Official Plan review and update) is expected to begin in November 2024 and to be completed in December 2025. The second stage (being the review and update of the Zoning By-law) is expected to begin early 2026 and be completed in December 2026. MHBC has proposed a timeline that matches the timeline in the proposal and anticipates reviewing this timeline and detailed work plan with the Municipality at the project start-up meeting.

The work plan outlined in this proposal is tailored specifically to the Municipality of Whitestone and is proposed to run in multiple phases for each stage of the project. Overall, the phased approach is centered around frequent meetings and communication with Municipal Staff, and a comprehensive community engagement strategy. A detailed Work Plan broken out for the Official Plan update and the Zoning By-law update has been attached as **Figures 1 and 2**.

In order for the public to have sufficient time to review draft documents, we will provide all draft documents well in advance of public sessions. We will rely on the Municipality of Whitestone to make all drafts of the document available on the Municipal website.



3.2 COMMUNITY ENGAGEMENT

3.2.1 OVERVIEW

In our experience, the public has become more educated, better informed, and more involved in the land use planning process as environmental and planning issues have come to the forefront of public interest. As Professional Planners we have a duty to ensure that we aspire to inform and include as many members of the public as possible in the engagement process. MHBC knows that going beyond the statutory requirements of the *Planning Act* is required to facilitate trust and meaningful engagement in the process and enable us to understand the wide interests and values that exist in the Municipality.

As a firm who has completed numerous Official Plan and Zoning By-law reviews, we have mastered the regulated public consultation requirements through the *Planning Act* and are constantly looking for new ways to engage the public in a way that remains beneficial to the end goal of the project.

Choosing the proper location of the public engagement sessions is critical given the ability of residents to access facilities. Locations for the proposed public engagement sessions will be discussed and chosen with the assistance of Municipal Staff. We want to provide opportunity for involvement at locations that residents frequently attend, including known community facilities and hubs. In consultation with Municipal Staff, we will determine the best approach to provide opportunity for residents to become informed, engaged and empowered. Having display boards especially for review of updated Zoning By-law maps for example, provides opportunities for residents to see how the proposed updates may impact their property, and provide their input. Overall, our approach seeks to:

- Provide opportunities for the community and key stakeholders to be involved in the process;
- Ensure input is secured from Council and Staff; and
- Use technology to promote ease of access for all.

As part of Phase 1 of each of the Official Plan and Zoning By-law projects, we will consult with the Municipality to determine what forms of communication and engagement tools have historically been the most effective for the residents of the Municipality and build upon the successes of previous engagement strategies.

Our firm is fully capable of engaging with Municipal Staff and other identified stakeholder groups through digital platforms that allow for virtual participation, direct input and screen sharing.



3.2.2 PROVIDING PUBLIC NOTICE AND INFORMATION

Throughout the project, MHBC will assist Municipal Staff in issuing press releases to announce the initiation of the Official Plan and Zoning By-law Review and other information related to the project, including public engagement dates and key milestone deadlines and targets. MHBC will also prepare all legislative notices required under the *Planning Act*. The circulation of notices will be the requirement of the Municipality, similar to the processing of applications from private landowners.

We will also establish a web-based communications protocol to enable members of the public to communicate with the Municipality and MHBC throughout this process. On the website we will post final versions of all the background material, discussion papers and other documents for public release. We have found that the e-consultation process has been extremely well received in most of our projects and it also provides an opportunity for seasonal residents to stay involved throughout the project. We have used this system in many communities that we work in to provide additional opportunity for engagement. Web-based communication will be an important component of the project to provide up-to-date and informative material to the public regarding engagement sessions, meetings, and important dates. MHBC works all over the Province and has been using e-consultation methods with great success.

3.2.3 DUTY TO CONSULT

Through the preparation of a new Official Plan and Zoning By-law, we understand that there is a duty to consult Indigenous communities.

We will advise the local Indigenous communities of the Official Plan and Zoning By-law update and invite them to meet and participate in the process. It is our experience that advising Indigenous communities of changes is not a sufficient form of consultation and they must be provided with an opportunity to provide their views and input directly throughout the Review process.

3.2.4 PUBLIC ENGAGEMENT AND COMMUNICATION STRATEGY

As part of our public engagement and communication strategy we are proposing the following opportunities for public engagement.

Official Plan Update:

- 1) Launch of Website
- 2) Indigenous Community Meeting(s)
- 3) Open House
- 4) Statutory Section 26 of the *Planning Act* meeting at Council

Zoning By-law Update:



- 1) Online posting of Updated Official Plan and Zoning By-law for public review and commenting
- 2) Indigenous Community Meeting(s)
- 3) Open Houses
- 4) Statutory Public Meetings

Overall, the community engagement strategy proposed reflects our understanding of the importance of meaningful and collaborative community involvement and will enable us to understand the wide interests and values that exist in the Municipality necessary in preparing an updated Official Plan and Zoning By-law. MHBC is prepared to work with the Municipality in modifying the engagement strategy as required.

3.3 MEETINGS WITH MUNICIPAL STAFF AND COUNCIL

A summary of the proposed Work Plan is included in Figure 1 of this proposal. The proposed Work Plan includes a number of meetings with Municipal Staff and Council to provide regular updates during the Official Plan and Zoning By-law Review project. Regular updates are important to keep Municipal Staff and Council informed of the process, timelines and feedback received throughout the process.

3.4 WORK PLAN – OFFICIAL PLAN UPDATE

PHASE 1 – BACKGROUND RESEARCH AND REVIEW

Task 1 – Start-up Meeting with Municipal Staff

MHBC will meet with appropriate Municipal Staff to review the work program, information requirements and communication protocols, as well as establish priorities and firm target dates for completing this project. During this meeting, we will:

- Confirm project scope, work plan, timelines and deliverables;
- Confirm roles and responsibilities of MHBC and select Municipal Staff;
- Identify key points of contact;
- Transfer any background reports and/or documents that may not be available publicly;
- Develop a FAQ with Municipal Staff to explain the project, key objectives, timeframe, and other information that will get posted on the website;
- Establish a dedicated “Official Plan Review and Comprehensive Zoning By-law Update for the Municipality of Whitestone” portal on the Municipality’s website;
- Discuss communication protocols, confirm responsibilities and identify any issues that could impact the successful completion of this project;



- Secure list of stakeholders and contact information from Municipal Staff;
- Identify any community members who may have a 'bigger interest' and discuss the need for early engagement (e.g. one on one dialogue with ratepayer groups);
- Define any stakeholders and/or community members with unique or historic 'points of friction' with the existing Zoning By-law and develop approaches to ensure these do not have an impact on the project success; and,
- Identify a logo or brand for the project in order to market the updated Official Plan and Comprehensive Zoning By-law project going forward.

Task 2 – Review of Background Information, Provincial Legislation and Plans

Task 2 will consist of a review of Provincial Legislation and Plans, existing Municipal policies and documents, and local issues. Task 2 is anticipated to run over the course of a few months and overlap with other tasks in the Work Plan to allow for a comprehensive review and integration with other aspects of the project. This exercise will provide us with the information to ensure that the updated Official Plan and eventually the updated Zoning By-law has regard to, is consistent with and conforms to the Provincial planning documents.

In addition, we will discuss local issues with Municipal staff and review the current Municipality of Whitestone Official Plan to better understand the existing policy framework and identify areas where updates or new policies are anticipated to be required.

Through this exercise, we will identify areas of conformity that need to be addressed, as well as recent policy changes or initiatives which may warrant the consideration of the development of new policies. We will also acquire GIS data layer updates from the Ministry of Natural Resources including any wetland and environmental features refinement. Updates of any policies related to the Endangered Species Act will also be determined based on current legislation and available information. A summary of the background information will be discussed with Municipal Staff for review and comments.

Task 3 – Provincial Pre-Consultation - Identify Conformity/Policy Issues

MHBC will work with Municipal Staff to coordinate a pre-consultation meeting with Provincial staff, as MMAH will be the approval authority of the updated Official Plan. The purpose of the meeting will be to meet with all reviewing Ministries to identify the conformity and policy issues that face the Municipality, which will ultimately provide the background information and direction for the preparation of the First Draft of the Official Plan.



Task 4 – Project Initiation Meeting with Council/Section 26

MHBC will make a presentation to Council to introduce the Official Plan update as Phase 1 of the overall project. It is intended that this meeting will be advertised as a Section 26 Meeting under the *Planning Act*. As part of this meeting, an overview of the Official Plan update process would be provided and anticipated policy updates would be discussed. This meeting is beneficial to the public as it provides them with an understanding of the structure of the review process itself, informs them as to how they can become involved and initiates discussions relating to relevant planning issues. Municipal Staff will be encouraged to participate in this project initiation as well.

Task 5 – Launch Website/Communications and Engagement Plan

As part of Phase 1 a dedicated 'Official Plan Update' portal on the Municipality of Whitestone's website will be established. The portal will provide a page where the community can find information related to the Official Plan review including upcoming meeting dates, discussion papers and draft documents, and provide instructions on how to provide comments. Depending on the outcomes of the start-up meeting, the website launch could occur immediately following the start-up meeting or shortly thereafter. Branding of the project will tie into the website presence.

A Communications and Engagement Plan will be prepared to guide the communication process throughout the project. This Plan will be developed with Municipal staff input. We expect communication to take the form of social media, news bulletins, Municipal website and potential mail outs to residents. The Communications and Engagement Plan will also outline the proposed opportunities for engagement throughout the process to update the Official Plan.

Task 6 – Meeting(s) with Indigenous Communities

Early in Phase 1, we will notify the local Indigenous communities of the Official Plan Update and invite them to engage and participate in the process. Meetings will be arranged as soon as possible to engage with those who are interested in participating in the project, to learn more about the area from their world views and encourage the building of strong collaborative relationships with the Municipality and striving for mutual prosperity. The MHBC team is committed to ensuring that Indigenous perspectives are considered through the Official Plan update. One meeting has been included in the project budget, however MHBC does realize that additional meetings may be required if requested from commenting Indigenous communities.



Phase 2 – Summary Report and First Draft

Task 7 – Discussion Paper – Preparation and Release for Public Comments

The Discussion Paper that will be prepared will be informed by the review of Provincial Legislation and Plans, existing Municipal policies and documents, and the outcomes from the community engagement in Phase 1. The Discussion Paper will identify key policy changes and initiatives that have occurred since the current Official Plan was prepared, highlight policy areas that need to be addressed and incorporated into the updated Official Plan, and summarize themes and items raised during the meetings and discussions held in Phase 1.

Consideration will be given to the need for policies or updated policies on topics including, but not limited to the following:

- Land needs to accommodate residential and employment growth over the long term;
- Servicing policies;
- Short-term rental policies;
- Housing supply, including permissions for allowing additional dwelling units, and affordable housing targets;
- Preservation of farmland and agricultural related policies including on-farm diversification uses;
- Poultry and livestock considerations on rural properties;
- Natural heritage, natural hazard and climate change policies;
- Commercial and employment designations;
- Telecommunications infrastructure policies;
- Lake capacity policies;
- Policies regarding shoreline development, permitted structures and guidance on sleep cabins;
- Guiding policies to determine when technical studies are required;
- Home occupations and home industries; and
- Complete application requirements and process implementation options.

The Discussion Paper will form the basis for the first draft of the updated Official Plan. MHBC will meet with Staff to review the draft Discussion Paper and make any revisions prior to release for public and agency review. This report will also be provided to the local Indigenous communities and posted on the project webpage for review and feedback.



Task 8 – Presentation of Discussion Paper

A meeting will be held with Council to review the Discussion Paper and to provide a summary of Phase 1 of the project. This will include a list and discussion of issues and items to be addressed in the updated Official Plan. Feedback on the directions will help inform the drafting of the updated Official Plan.

Phase 3 – Drafting the Official Plan

Task 9 – Preparation of Draft Policies and Official Plan Schedules

Based on the material that is reviewed and the new information that is collected during Phase 1 of the project, the first draft of the updated Official Plan will be prepared. The document will include reference to the latest legislation and Provincial Plans and will incorporate comments made during the Council, staff and community engagement.

As part of the first draft, updated Official Plan schedules will also be developed. This work will involve review, refinement and revision to all land use designations, as appropriate. An objective of this exercise will also be to ensure that the Official Plan schedules are easy to read and interpret.

Task 10 – Open House and Public Review

This Open House is a requirement under Section 17 of the *Planning Act*. The Open House would provide an opportunity for the public to have informal discussions with the project team regarding the proposed Official Plan policies and schedules. This Open House will include a walkabout of displays and information boards. An overview presentation may also be incorporated into the session if determined to be appropriate.

We have found that this approach allows participants to gain an understanding of the draft document and ask questions that reflect their individual properties and have one-on-one opportunities to further engage with the project team. In this regard, the public has the opportunity for direct communication with the project team and can provide comments in a friendly, interactive and informal manner prior to a formal Statutory Public Meeting with Council. Often people's concerns can be addressed at this stage and provide clarity of information.

The desired outcome of this Open House is to provide an opportunity for the community to see what proposed and amended policies have been included in the draft document, provide the project team with input on the implications (positive or



negative) that these draft policies may have, and to provide an opportunity to address any outstanding comments prior to the Statutory Public Meeting.

The draft Official Plan will be posted on the website and circulated to agencies and the Province, as approval authority, for review and comments. A comment form will be made available on the website to receive public comments.

Phase 4 – Adoption of the Final Plan

Task 11 – Meeting with Municipal Staff

A meeting will be held with Municipal Staff to review the draft Official Plan in the context of comments provided through the Provincial, public and agency review, and at the Open House and determine the direction for finalizing the Official Plan. In preparation for that meeting, MHBC will prepare a table of comments and recommendations as to how to address them in the final Official Plan document.

Task 12 – Preparation of Final Official Plan

Following the Provincial, public and agency consultation review, and the review by Municipal Staff and Council, we will prepare the final draft of the proposed Official Plan update. This updated Official Plan will incorporate and/or address comments from the Province, Council, Municipal Staff, relevant agencies and the public.

Task 13 – Statutory Public Meeting

The final public consultation process will be the Statutory Public Meeting under Section 17 of the *Planning Act*. At this meeting MHBC will present the draft Official Plan update to Council and respond to any questions or comments made by members of the public and Council. The desired outcome of the Statutory Public Meeting is to seek public comment on the Official Plan prior to the Plan being adopted by Council. It is anticipated, however, that by this point, the majority of the comments have been considered.

Task 14 – Adoption of Official Plan

The final draft of the Official Plan will be presented to Council for adoption. MHBC will prepare a report including information which summarizes public involvement throughout the process, outline the key issues and key policy areas of the updated Official Plan and provide recommendations as to the adoption of the document. Any changes made following the Statutory Public Meeting will be addressed.



PHASE 5 – Submission to MMAH for Approval

Task 15 – Submission to Province for Approval

MHBC will provide the final document to the Municipal staff to provide the adopted Municipality of Whitestone Official Plan (or Official Plan Amendment) to the Provincial Ministry of Municipal Affairs and Housing for review and approval.

3.5 WORK PLAN – COMPREHENSIVE ZONING BY-LAW UPDATE

It is expected that work will begin on the Comprehensive Zoning By-law Update as the updated Official Plan is moving from adoption by Council to the Provincial review for approval.

PHASE 1 – Background Review

Task 1 – Start-up Meeting with Municipal Staff

As we shift into the Zoning By-law Update part of the overall project, MHBC will meet with appropriate Municipal staff to review the work program, information requirements and communication protocols, as well as establish priorities and firm target dates for completing this project. During this meeting we will:

- Confirm project scope, work plan, timelines and deliverables;
- Confirm roles and responsibilities of MHBC and select Municipal staff;
- Identify key points of contact;
- Transfer any background reports and/or documents that may not be available publicly;
- Develop an FAQ with Municipal staff to explain the project, key objectives, timeframe, and any other information that will get posted on the website;
- Discuss communication protocols, confirm responsibilities and identify any issues that could impact the successful completion of this project;
- Make any adjustments to the roles, responsibilities and communication and engagement plan based on experience gained through the Official Plan Update;
- Secure a list of stakeholders and contact information from Municipal staff;
- Identify any community members who may have a 'bigger interest' and discuss the need for early engagement (e.g. one on one dialogue with ratepayer groups);



- Define any stakeholders and/or community members with unique or historic 'points of friction' with the existing Zoning By-law and develop approaches to ensure these do not have an impact on the project success; and
- Determine if any changes need to be made to the logo or brand of the project to market the Zoning By-law Update specifically.

Task 2 – Communication and Engagement Plan

The Communications and Engagement Plan will be reviewed with Municipal staff and refined as necessary based on feedback and our collective experience through the Official Plan update portion of the overall project, to guide the communication process through this stage of the project.

The preparation of a Zoning By-law is much different than the preparation of an Official Plan; an Official Plan is a visionary document while the Zoning By-law is a regulatory document. For most community members, engagement regarding an updated Zoning By-law is about how the zoning provisions have the potential to impact their property. In this regard, we propose an engagement strategy that informs the public of the project, the process and the opportunities for engagement at the beginning of the process, but to meet with the public once draft documents have been prepared. The public will be encouraged to provide written comments to the Municipality at any time throughout the process.

Task 3 – Review and Identify Issues

A review of the existing Zoning By-law will be undertaken, including the administration components, definitions, general provisions and the specific zone provisions to identify current issues. Consultation with Municipal staff to identify what sections of the Zoning By-law currently function well, and what sections require improvement will also be undertaken. It is anticipated that this portion of the review will identify any areas of ambiguity, inconsistency and interpretation issues with the current Zoning By-law.

Task 4 – Virtual Meeting to Provide Introduction to the Zoning By-law Review

A virtual meeting is recommended to introduce the Zoning By-law Review to members of the public, Staff and Council. This meeting provides an opportunity for MHBC to summarize the project scope and timeline and provides participants the opportunity to ask questions. A component of the meeting would be reserved to respond to specific questions and comments, however as noted, there will be other opportunities to provide comments throughout the review process.



Task 5 – Review Historic Amendments, Minor Variance Decisions and OLT Decisions

A review of the historic amendments to the current Zoning By-law will be undertaken to identify if specific changes to the current Zoning By-law are warranted to address consistently amended sections. Likewise, this task will also include a review of Municipal minor variance decisions, as well as any applicable OLT decisions to understand any themes in requests and related issues with the Zoning By-law.

During the review of historic amendments and variances, we will also identify which amendments need to be carried forward and which amendments can be eliminated.

Task 6 – Mapping Updates

A key component of this Phase will involve working with the Municipal GIS Staff to commence preparation of the updated Zoning By-law Schedules. It is anticipated that this task will include taking the existing zone maps and overlaying the updated Official Plan mapping, as well as updating the mapping with historical amendments from the previous By-law. Any updates to natural heritage feature mapping will also be conducted should it be required. If it is identified through the background review that modifications to zone provisions are required, queries can be run on the mapping database to determine if these provisions are appropriate (e.g. modifications to minimum lot area).

Task 7 – Review of Definitions, Diagrams and Standards

A review of the permitted uses for all zones will be undertaken to ensure that all permitted uses are defined in the Zoning By-law. The current definitions will be reviewed to determine if the definitions require updating to reflect modern uses of various terms. In this task, a review of permitted uses will also be undertaken to identify if various uses can be scoped or better defined through modified definitions. Additional samples of zoning diagrams which we have created and found to be very useful can be found in **Appendix 4**.

A review of the development standards for all zones will also be undertaken. At this stage we will also consider whether additional zones or consolidation of existing zones would be beneficial in order to implement the updated Official Plan and improve the clarity and administration of the By-law.



PHASE 2 – PROPOSED ISSUES DIRECTION

Task 8 – Technical Memorandum

Based on the discovery from Phase 1 a Technical Memorandum which will be prepared that provides a concise inventory of available data and aspects of the existing Zoning By-law that require updates. The memorandum will include recommendations on structure, formatting options, zone updates to align with the updated Official Plan, recommended approach to zone exceptions, approach on mapping, definitions, general provisions, and other topics such as parking and loading, and performance standards. A summary of next steps leading to the preparation of the updated Zoning By-law and note how members of the public can stay informed will also be included.

Task 9 – Council Workshop

Following the preparation of the Technical Memorandum, a workshop will be held with members of Council to review major themes/issues identified within Phase 1 of the Zoning By-law update, and to discuss the proposed direction of the updated Zoning By-law. This workshop will also provide an opportunity for Council to identify any specific issues they may have identified with the current Zoning By-law that need to be addressed through the preparation of a Zoning By-law update. Council will be asked to confirm the direction to be taken in the preparation of the updated Zoning By-law.

PHASE 3 – DRAFT ZONING BY-LAW

Task 10 – First Draft of Updated Zoning By-law

The first draft of the updated Zoning By-law will be a complete version of the Zoning By-law including Permitted Uses, Regulations, General Provisions, Zone Schedules, Zone Exceptions, and Holding (H) Symbols. The Zoning By-law will be updated in accordance with the findings and conclusions of Phase 1 and Phase 2. In addition to updating the text of the document, the maps will also be updated by MHBC's Planners and Technicians.

Of note, keeping track of Holding Provisions and Temporary Use By-laws can be problematic for municipalities. Our approach to these special zones is to create sections and tables in the By-law that identifies the zones having a Hold or Temporary Use. The Table identifies the conditions that need to be satisfied to lift the Hold.



Temporary Use Tables identify the permitted uses and the expiration date of the temporary provisions. These help the Municipality to easily track these approvals.

Task 11 – Review First Draft with Municipal Staff

A meeting with Municipal Staff will be held to review the First Draft of the Zoning By-law and to identify any modifications that are required prior to proceeding with an Open House. It is also recommended that the First Draft of the Zoning By-law be sent to reviewing agencies and Indigenous Communities.

Task 12 – Open House #1

An Open House will be conducted to present the public with the First Draft of the Zoning By-law. The Open House will provide residents and business owners with an opportunity to review and compare the draft changes to the existing Zoning By-law with the proposed updated Zoning By-law. The Open House will also provide attendees with an opportunity to discuss the proposed changes with the project team and Municipal Staff on a one-to-one basis. It is our experience in areas with a permanent and seasonal population that having the Open House in the summer months maximizes the number of residents that can be available to attend the Open House and provide input.

MHBC is prepared to work with the Municipality in modifying the Open House format as required. A copy of the First Draft of the Zoning By-law will also be made available on the Municipal website so that members of the public can review and provide comments.

Task 13 – Second Draft of Zoning By-law

Following Open House #1 and the commenting period on the First Draft of the Zoning By-law, MHBC will review the comments that have been provided. As appropriate, these comments will be incorporated into the Second Draft of the Zoning By-law. The Second Draft of the Zoning By-law will then be reviewed with Staff to identify any modifications that are required prior to proceeding with the statutory Open House.

Task 14 – Meeting with Council

The Second Draft of the Zoning By-law will be presented to Council with the intent of receiving direction to proceed to the final Open House and Statutory Public Meeting. At this meeting, Council will be provided with information related to the key modifications to the Zoning By-law that have been undertaken as part of the Review.

Task 15 – Statutory Open House

The final Open House provides the public with an opportunity to review the Draft of the Zoning By-law prior to proceeding to the Statutory Public Meeting. This Open



House will provide MHBC and Staff with an opportunity to hear public comments, to make any outstanding necessary changes to the Zoning By-law and to address comments prior to the Statutory Public Meeting. It is our experience that this Open House often significantly reduces the comments that are received at the Statutory Public Meeting. This Open House also provides residents with an opportunity to see how their comments have been incorporated into the document.

PHASE 4 – FINAL ZONING BY-LAW

Task 16 – Statutory Public Meeting

The Statutory Public Meeting with Council will be held to review the Draft Zoning By-law and to give the public an opportunity to provide comments before Council makes a decision. Notice of the Public Meeting will be coordinated with Staff in accordance with the *Planning Act*. This meeting will consist of a presentation by MHBC of the key modifications that have been incorporated as part of the Zoning By-law, followed by an opportunity for members of the public to provide comments.

Task 17 – Finalize Zoning By-law

Following the Statutory Public Meeting, the Zoning By-law will be finalized. This document will be the version of the document that will be brought to Council for enactment.

Task 18 – Council Enactment

A Report that summarizes the key issues that have been identified through the process and how these issues have been addressed in the Zoning By-law will be prepared. MHBC will document in a comment response table, how we have responded to public and agency comments that have been received.

This Report will also contain a summary of the implementation requirements of both the Official Plan and the Provincial Planning Statement. We will attend the meeting with Council where the By-law is considered for approval. At this meeting, a brief overview of the Zoning By-law Review process and the key components of the By-law will be provided should it be deemed necessary.



4.0 SCHEDULE OF WORK

MHBC has reviewed the project timeline proposed in the RFP and notes that the Official Plan Review portion of the project is expected to be complete in December of 2025. The Comprehensive Zoning By-law update portion of the overall project is anticipated to begin in late 2025, as some tasks can be completed concurrently with the Official Plan Review as the Official Plan is coming forward to Council for adoption. The expected completion date for the Comprehensive Zoning By-law update is December of 2026. Given the public consultation requirements and the timeframes for agency review, MHBC has proposed a timeline of 26 months for this project as a whole, ending in December of 2026.

Should schedule changes be required, we are prepared to adjust our proposed timeline as is necessary to meet the needs of the Municipality. A detailed summary of the project tasks and project timing are provided in Figures 1 and 2 – Work Plans. At the project start-up meeting for each part of the overall project, we will review the project timeline with staff and confirm deliverable dates.

In undertaking this project, we will provide drafts of documents well in advance of Open Houses and Public Meetings to enable sufficient time for review by Municipal Staff, Council and the community.

MHBC is committed to providing high quality products both on time and on budget – our past performance reflects this approach. Our commitment is to communicate and keep the Municipality up to date on the project timeline and budget throughout the process to ensure that any issues that arise are appropriately considered and addressed in a timely fashion.

5.0 VALUE ADDED SERVICE

5.1 STAFF EXPERIENCE

MHBC has the ability to draw from a number of internal sectors, including professional planners, landscape architects, heritage planners, technicians and urban designers. This wide range of experience will ensure that there are no questions left unanswered through the project. The Official Plan update will include a number of components beyond what is legislated in Provincial Plans. Other information and policies can be added to reflect the unique character of the Municipality. We recognize that there is not a “one size fits all” approach to planning, and that planning issues vary across



municipalities. We recognize some of the issues to be addressed in the preparation of the updated Official Plan and Zoning By-law for the Municipality of Whitestone have been listed above, and MHBC will be open to explore other topics as necessary.

In order to accomplish the above, we believe that the Municipality requires a professional team that:

- Has project team members with senior leadership experience in municipal planning and development approvals and who understand the importance of collaborating with all municipal departments to gather timely and accurate information;
- Has experience conducting Official Plan Reviews and updating Zoning By-laws for urban and rural communities;
- Has dealt with planning policies related to shorelines and waterfront areas;
- Has developed and implemented industry leading Official Plan policies and Zoning By-law definitions throughout the Province;
- Has developed and implemented effective community engagement strategies which encourage stakeholder and overall public participation and ensures that input is valued and given appropriate consideration;
- Are experienced facilitators in conducting meaningful, creative and effective Official Plan outreach and engagement strategies;
- Has industry leading, in-house CAD and GIS capabilities to produce mapping and schedule documents that are compatible with the GIS and online viewing software; and
- Has experience defending Official Plans and Zoning By-laws on behalf of the municipalities at the Ontario Lands Tribunal and is keeping current on regulations, rules and procedures related to the Ontario Lands Tribunal.

MHBC has the requisite experience needed to not only meet the needs of the Municipality of Whitestone, but to exceed its expectations.

5.2 **RELATIONSHIP WITH MUNICIPAL STAFF**

MHBC benefits from working with both public and private sector Clients. Through our experience, we understand the dynamic relationship amongst internal municipal departments and the importance of involving these other departments through major processes, such as an update to the Official Plan and Zoning By-law. We encourage open communication with Municipal Staff and are always willing to listen to feedback and adapt or adjust our approach as necessary.

MHBC currently provides planning services to the Municipality and has sincerely enjoyed working with Municipal Staff and Council. Through various meetings, MHBC



has gained an appreciation of some of the land use planning issues facing the community and believes that we can assist in preparing documents that fit the community.

6.0 EXPERIENCE WITH SIMILAR PROJECTS AND REFERENCES

In addition to the in-house planning services that MHBC provides to municipalities across the province, MHBC also has experience preparing Official Plan and Zoning By-laws. The municipalities that we have completed Official Plan and/or Zoning By-laws for is included in **Appendix 2**. In addition to the information provided in **Appendix 2**, the below are references for previous projects we have completed.

Project	Township of Nipissing Official Plan Review
Company Name	Township of Nipissing
Contact Name	Kris Croskery-Hodgins, Municipal Administrator–Clerk-Treasurer
Contact Information	705-724-2144
Description	Jamie has completed an Official Plan Review for the Township of Nipissing which is located in the Parry Sound District, and are currently finalizing a new Zoning By-law. Jamie and Patrick provide planning services to the Township and have worked with Mr. Barton on a number of projects including the preparation of the Township’s original Official Plan and Zoning By-law.

Project	Township of Tiny Zoning By-law Review
Company Name	Township of Tiny
Contact Name	Robert Lamb, CAO
Contact Information	705-526-4204 Ext 224



Description	MHBC was retained to complete the Township’s Zoning By-law update. MHBC also provides in-house planning services to the Township of Tiny.
-------------	-------------------------------------------------------------------------------------------------------------------------------------------

Project	Municipality of Sioux Lookout – Official Plan and Zoning By-law Review
Company Name	Municipality of Sioux Lookout
Contact Name	Jody Brinkman, Manager of Development Services
Contact Information	807-737-2700 x 2244
Description	MHBC Staff have been providing ongoing planning services to the Municipality of Sioux Lookout for several years. MHBC prepared the Municipality’s Official Plan and Comprehensive Zoning By-law in 2019.

7.0 PROJECT BUDGET

MHBC Planning offers to complete the Official Plan update and Comprehensive Zoning By-law update for the Municipality of Whitestone in accordance with the terms and conditions as outlined within the proposal and within our submission.

We have included as **Figures 3 and 4**, a Project Budget that provides an itemized and detailed breakdown of hourly rates, number of days for each task along with the corresponding team member to complete the tasks, as well as disbursements which include document production costs and travel costs.

We can complete the project strictly in accordance with the tasks outlined in the Work Plans for a combined total project cost of \$131,775 plus HST.

In addition to the Project Budget, we have also provided a Work Plan for the project, included as **Figures 1 and 2**. We are aware that the work related to this project must be coordinated and scheduled with the Municipality and we are prepared to adapt our work plan and billing procedures to meet the Municipality’s timing and budget requirements.



8.0 **WSIB**

MHBC confirms that we have WSIB clearance that will be maintained for the duration of the project.

9.0 **CONFLICT OF INTEREST**

We can confirm that we have no conflicts of interest in completing this project. MHBC currently provides planning services to the Municipality of Whitestone however, the project team confirms that we have no private sector clients with property or proposals in the municipality, and MHBC commits to not taking on any new projects or clients over the duration of this project that would result in a conflict of interest. We note the following:

- That no person either natural or body corporate, other than the Proponent, has or will have any interest or share in this proposal or in the proposed contract, and
- There is no collusion or arrangement between the Proponent and any other Proponent(s) in connection with this project, and
- The Proponent has no knowledge of the contents of other proposals and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the proposal.

10.0 **DELIVERABLES**

In addition to attendance at the meetings and workshops proposed in the Work Plan, we are committed to providing the following documents to the Municipality as outlined in the Request for Proposal Document:

- Two (2) bound hard copies of all draft and final reports
- One (1) electronic PDF version of all draft and final reports on appropriate media or via email
- One (1) electronic MS Word version of all draft and final reports on appropriate media or via email.
- One (1) electronic copy in PDF, JPEG, or TIFF format of all plans, illustrations and/or drawings produced during the review as well as,
- One (1) electronic copy off all plans, illustrations and/or drawings in an appropriate GIS file format.



- One (1) electronic copy of all schedules
- One (1) electronic and one (1) hard copy of all meeting minutes, public notices, presentations, handouts, comments, sign-in sheets, etc. prepare for, or as a result of the public consultation and Official Plan Review and Zoning By-law process.



Appendix 1



MHBC Planning has been delivering a full range of planning services to the public and private sector since 1973. MHBC is owner operated, has 18 Partners and a full complement of Associates, Planners, Landscape Architects, Cultural Heritage Experts, Agricultural Experts, Urban Designers and Technical Support Staff. Our six offices are well positioned in Ontario to provide a wide range of services to public and private sector clients.

At MHBC we provide exceptional service and leadership by combining professional experience, innovative problem solving skills, and a thorough knowledge of policy and legislation to provide our clients the best possible advice and product.

MHBC understands the need for a wide range of expertise to facilitate complex projects and assemble the best team for each project. We work closely with professionals from numerous disciplines and are well known for our ability to manage complicated projects within tight timelines and budgets.

Successful completion of hundreds of projects across Ontario has resulted in strong working relationships with many government agencies and professionals. MHBC has earned a reputation as trusted professionals.





Growth management, economic development, environment and resource management and community facility planning are just a few of the current challenges facing municipalities. Practical solutions require consideration of multiple interests and stakeholder input within the community while adapting to evolving legislation and regulations.

Using our broad experience and a strong focus on exceptional service and professionalism, MHBC provides municipal staff, ratepayers, and applicants convenient and timely access to our planning services. For more than 30 years, MHBC has provided decisive and reliable municipal planning advice combined with a high level of personal service



Our Municipal Services Include:

Official Plans/Municipal Plans
Secondary/Community Plans
Strategic Plans and Community Visioning
Comprehensive Zoning By-Laws
AutoCad / GIS Mapping
Application reviews
Urban Design Guidelines
Commercial Policy Reviews and Commercial Need Studies
Downtown/main street revitalization
Tourism, Recreation and Leisure Studies
Neighbourhood Improvement Plans
Development Charge Studies and By-Laws
Representation at public open houses / council meetings
Public/Stakeholder Facilitation
Local Economic Development Studies
Industrial Land Needs Studies
Annexation/Growth Management Studies
Local government restructuring
Agricultural Studies
Peer Reviews
Landscape Architecture
Park Master Plans
Cultural Heritage Inventories / Studies
Mediation
Expert Testimony at Tribunals: OMB, ERT, Joint Board,
Conservation Board and Superior Court



www.mhbcplan.com

KITCHENER

t: 519.576.3650
f: 519.576.0121

WOODBRIIDGE

t: 905.761.5588
f: 905.761.5589

LONDON

t: 519.858.2797
f: 519.858.2920

KINGSTON

t: 613.348.7067
f: 613.348.8999

BARRIE

t: 705.728.0045
f: 705.728.2010

BURLINGTON

t: 416.518.8394
f: 905.761.5589



Appendix 2



OFFICIAL & SECONDARY PLANS

Official Plans

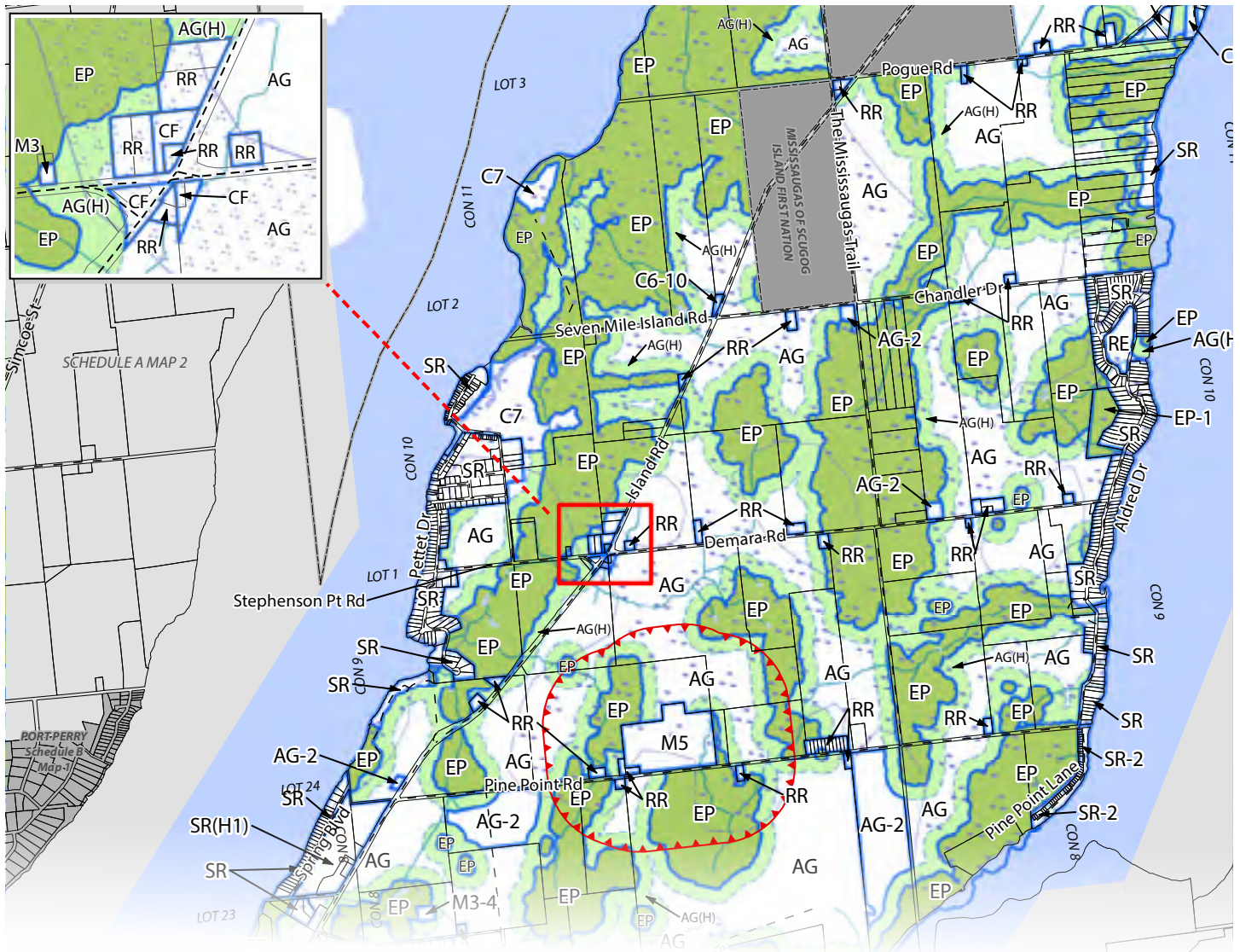
- Region of Halton
- County of Elgin
- City of Dryden
- City of Thorold
- Municipality of Brockton
- Municipality of Callander
- Municipality of Dysart et al
- Municipality of Highlands East
- Municipality of Magnetawan
- Municipality of Meaford
- Municipality of Powassan
- Municipality of Wawa
- Town of Atikokan
- Town of Blind River
- Town of The Blue Mountains
- Town of Bracebridge
- Town of Gravenhurst
- Town of Halton Hills
- Town of Kearney
- Town of Kincardine
- Town of Lincoln
- Town of Milton

- Town of Moosonee
- Town of New Tecumseth
- Town of Pelham
- Town of Saugeen hores
- Town of Slroux Lookout
- Town of Whitby
- Township of Amaranth
- Township of the Archipelago
- Township of Cardiff
- Township of Cavan
- Township of Chapman
- Township of Chisholm
- Township of Ear Falls
- Township of East Luther Grand Valley
- Township of Himsworth
- Township of King
- Township of Machar
- Township of Machin
- Township of Michipicoten
- Township of Minden Hills
- Township of Nipigon
- Township of Nipissing

- Township of Oro-Medonte
- Township of Perry
- Township of Scugog
- Township of Seguin
- Township of St. Joseph
- Township of Strong
- Township of Tarbutt & Tarbutt Additional
- St. Joseph Island Planning Board

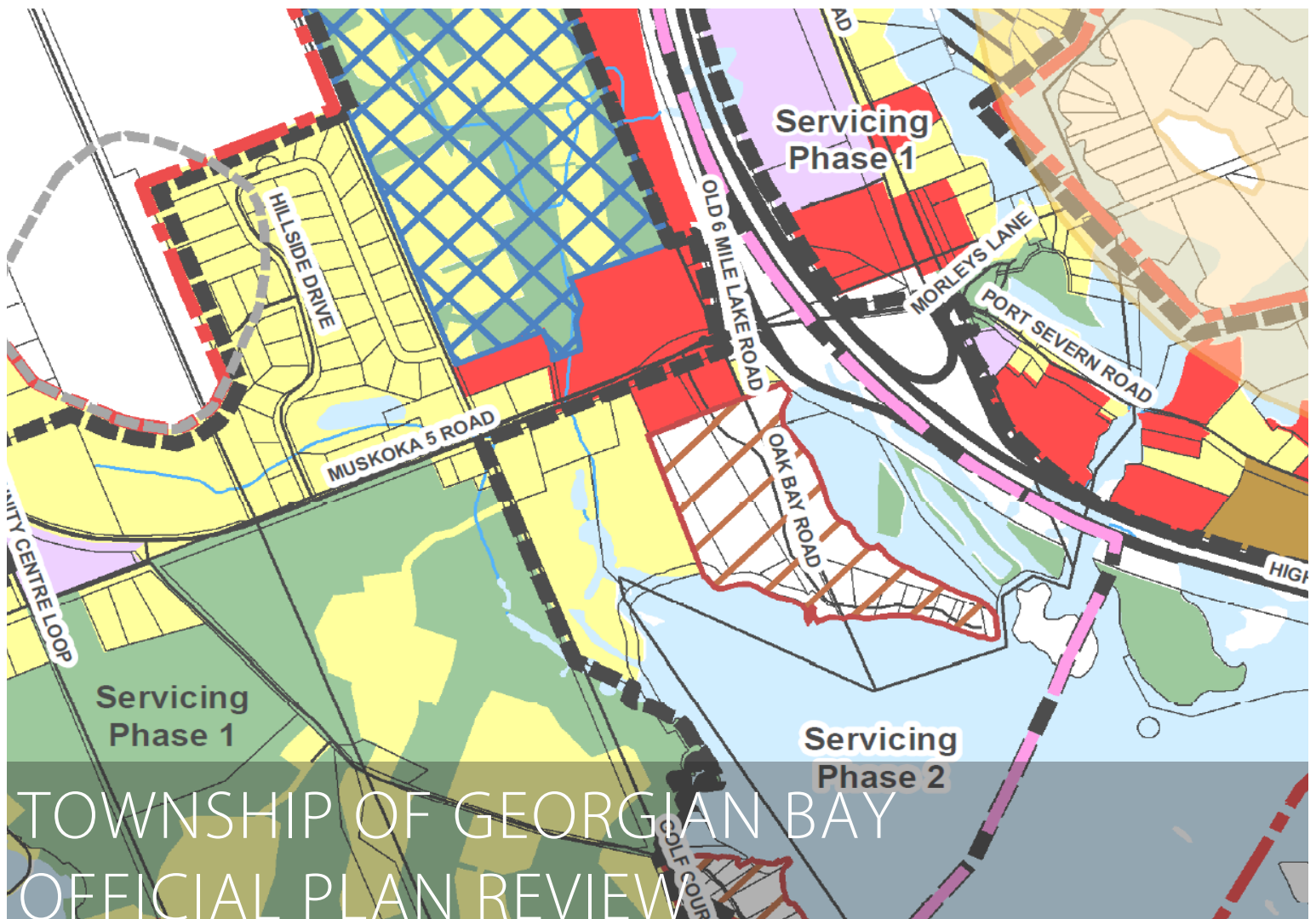
Secondary Plans

- Sandwich South Secondary Plan Windsor
- Port Perry Employment Area Secondary Plan
- Township of West Lincoln Employment Land Development Strategy
- East Woodstock Secondary Plan
- Waterloo Corporate Campus Master Plan



ZONING BY-LAWS

- City of Dryden
- City of Greater Sudbury
- City of Kenora
- City of London
- City of Niagara Falls
- City of Orillia
- City of Oshawa (ORM)
- City of Ottawa
- City of Pickering (ORM)
- City of Regina
- City of Weyburn
- Municipality of Callander
- Municipality of Dysart et al
- Municipality of Highlands East
- Municipality of Kincardine
- Municipality of Machin
- Municipality of Meaford
- Municipality of Magnetawan
- Municipality of Port Hope
- Municipality of Powassan
- Town of Ajax
- Town of Atikokan
- Town of Aurora
- Town of Blind River
- Town of Bracebridge
- Town of Bradford West Gwillimbury
- Town of The Blue Mountains
- Town of Caledon
- Town of Cobourg
- Town of Ear Falls
- Town of East Gwillimbury
- Town of Fort Frances
- Town of Geraldton
- Town of Gravenhurst
- Town of Halton Hills
- Town of Hanover
- Town of Kearney
- Town of Keewatin
- Town of Lincoln
- Town of Markham
- Town of Midland
- Town of Milton
- Town of Moosonee
- Town of Oakville
- Town of Richmond Hill
- Town of Shelbourne
- Town of Siroux Lookout
- Town of Wasaga Beach
- Town of Whitby (ORM)
- Town of Whitchurch Stouffville
- Township of Amaranth
- Township of Anson, Hindon and Minden
- Township of the Archipelago
- Township of Cardiff
- Township of Chisholm
- Township of East Luther Grand Valley
- Township of Ernestown
- Township of Georgian Bay
- Township of Hilton
- Township of Jocelyn
- Township of Machar
- Township of Machin
- Township of Michipicoten
- Township of Monmouth
- Township of Mulmur
- Township of Nipissing
- Township of Nipigon
- Township of the North Shore
- Township of Oro-Medonte
- Township of Perry
- Township of Schreiber
- Township of Scugog
- Township of Seguin
- Township of St. Joseph
- Township of Strong
- Township of Tay
- Township of Tiny
- Village of Beeton
- Village of Coldwater
- Village of Sunridge
- Village of Tottenham



TOWNSHIP OF GEORGIAN BAY OFFICIAL PLAN REVIEW

CLIENT: TOWNSHIP OF GEORGIAN BAY
 TYPE: OFFICIAL PLAN REVIEW
 DATE: 2012 - 2014

MHBC undertook an Official Plan Review for the Township of Georgian Bay, resulting in the Township's first new Official Plan in over 20 years. Georgian Bay is a vast municipality with numerous distinct communities, including a variety of coastal and inland waterfront communities, two urban centres, a rural service centre and vast rural areas. All of these areas are unique in terms of their character, development constraints, natural heritage considerations and other opportunities, and many of these areas are represented by stakeholder and community associations. In order to prepare a new Official Plan that captured the varying nature of the Township, MHBC facilitated an intensive public consultation process that included stakeholder meetings with various neighbourhood and community associations, stakeholder workshops and open houses, meetings with the Township's Planning Committee, public comment summary charts and project update newsletters. Throughout the Official Plan Review process, MHBC also received, reviewed and incorporated hundreds of written comments from residents and stakeholders.

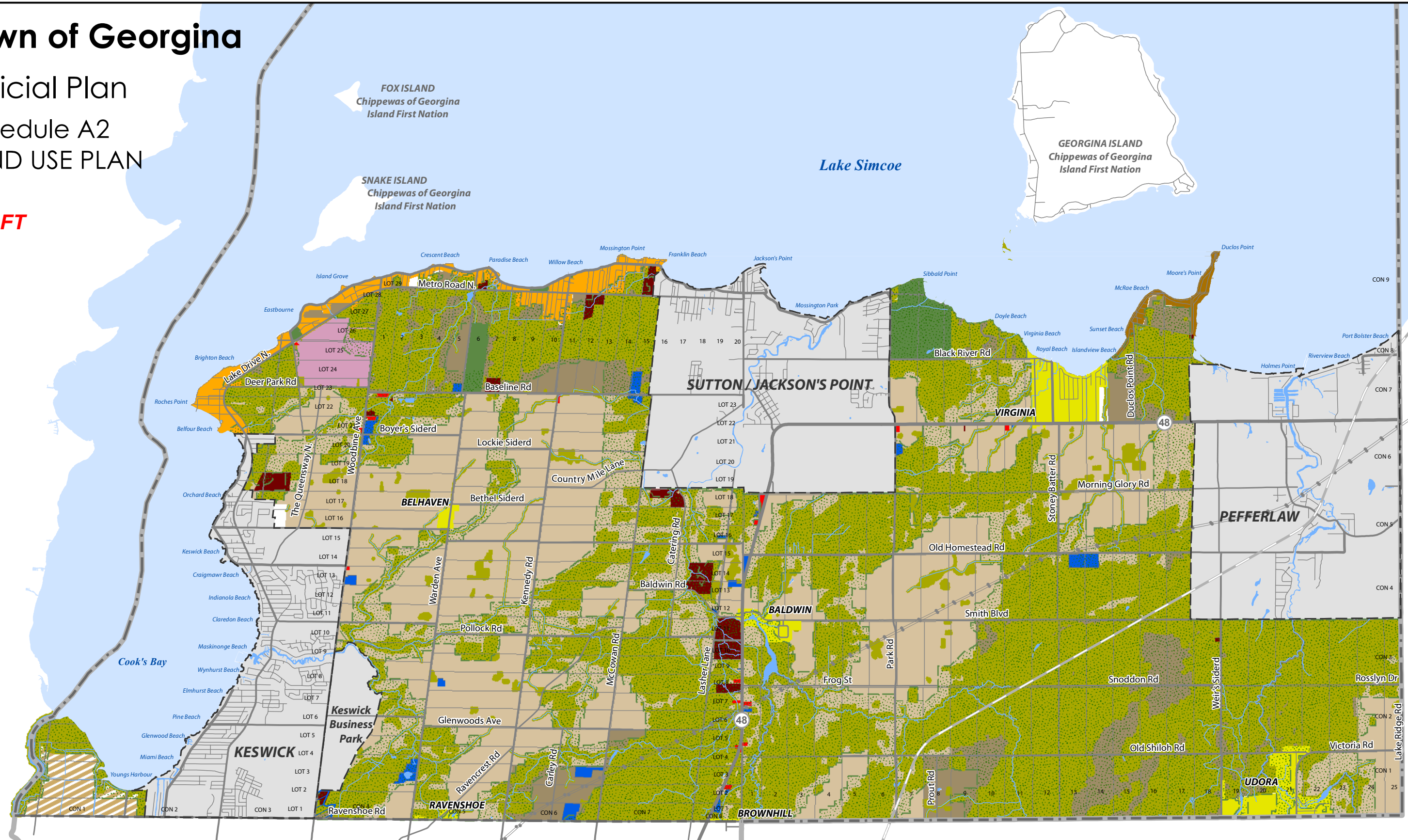
MHBC incorporated a variety of new policies, mapping and concepts into the Official Plan, including a growth management strategy, natural heritage, natural hazard, resource and waterfront character policies, distinct notification requirements for different areas, and Wetland and Fish Habitat mapping, amongst others. The Approved Official Plan is a comprehensive and forward thinking document that effectively balances the unique character of the different areas of the Township with natural heritage and hazard considerations, and the ability to effectively and efficiently accommodate appropriate growth.



Town of Georgina

Official Plan Schedule A2 LAND USE PLAN








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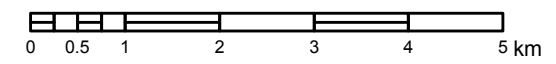


LAND USE DESIGNATIONS

	Lakeshore Residential Area		Commercial Recreation Area		Agricultural Protection Area
	Serviced Lakeshore Residential Area		Rural Industrial Area		Specialty Crop Area
	Urban Residential Area		Keswick Business Park Study Area		Environmental Protection Area
	Hamlet Area		Parkland Area		Greenlands System
	Rural Commercial Area		Rural Area		

BASE MAP INFORMATION

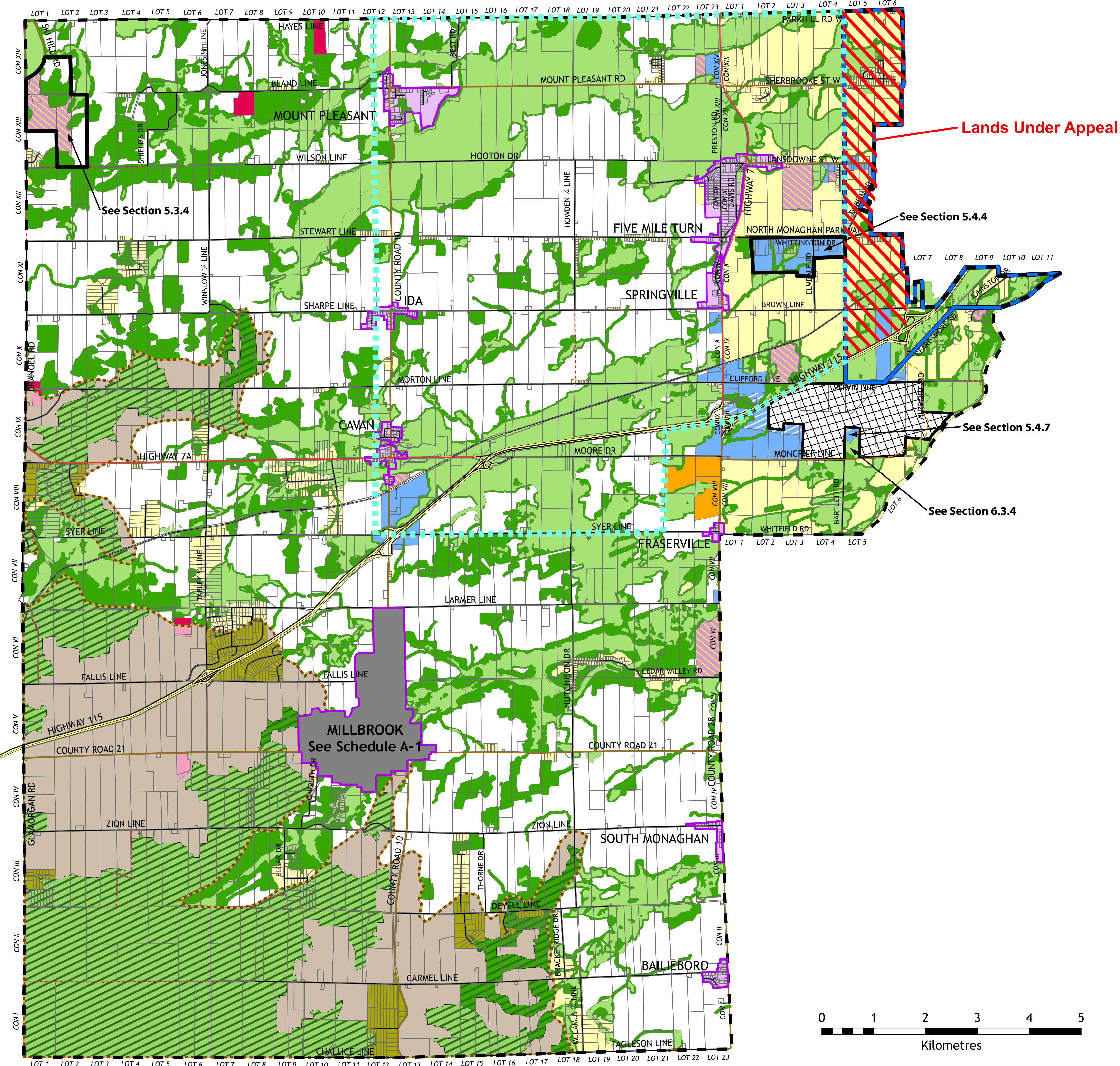
	Provincial Highway
	Road
	Railway
	Municipal Boundary
	Regional Boundary
	Hydro Corridor
	Secondary Plan Area
	Watercourse
	Waterbody



Sources: Town of Georgina, Regional Municipality of York, ArcGIS Online Basemaps. Lake Simcoe Region Conservation Authority. Produced by York Region and MHBC Planning under licence from Ontario Ministry of Natural Resources, Copyright © Queens Printer 2015

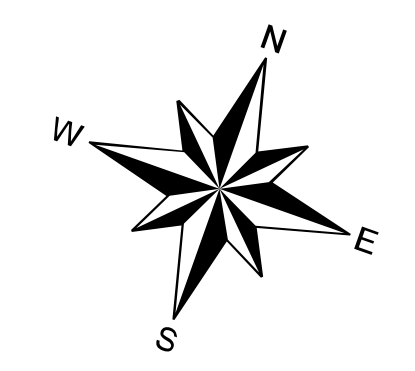
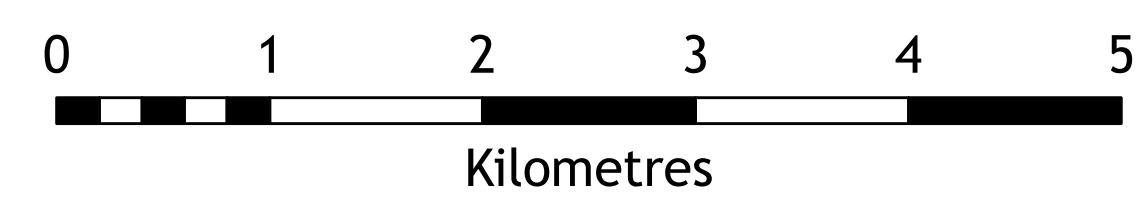
Date: March 5, 2015

Township of Cavan Monaghan Official Plan - Schedule 'A' Land Use



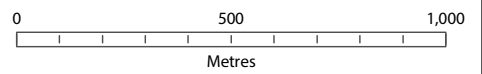
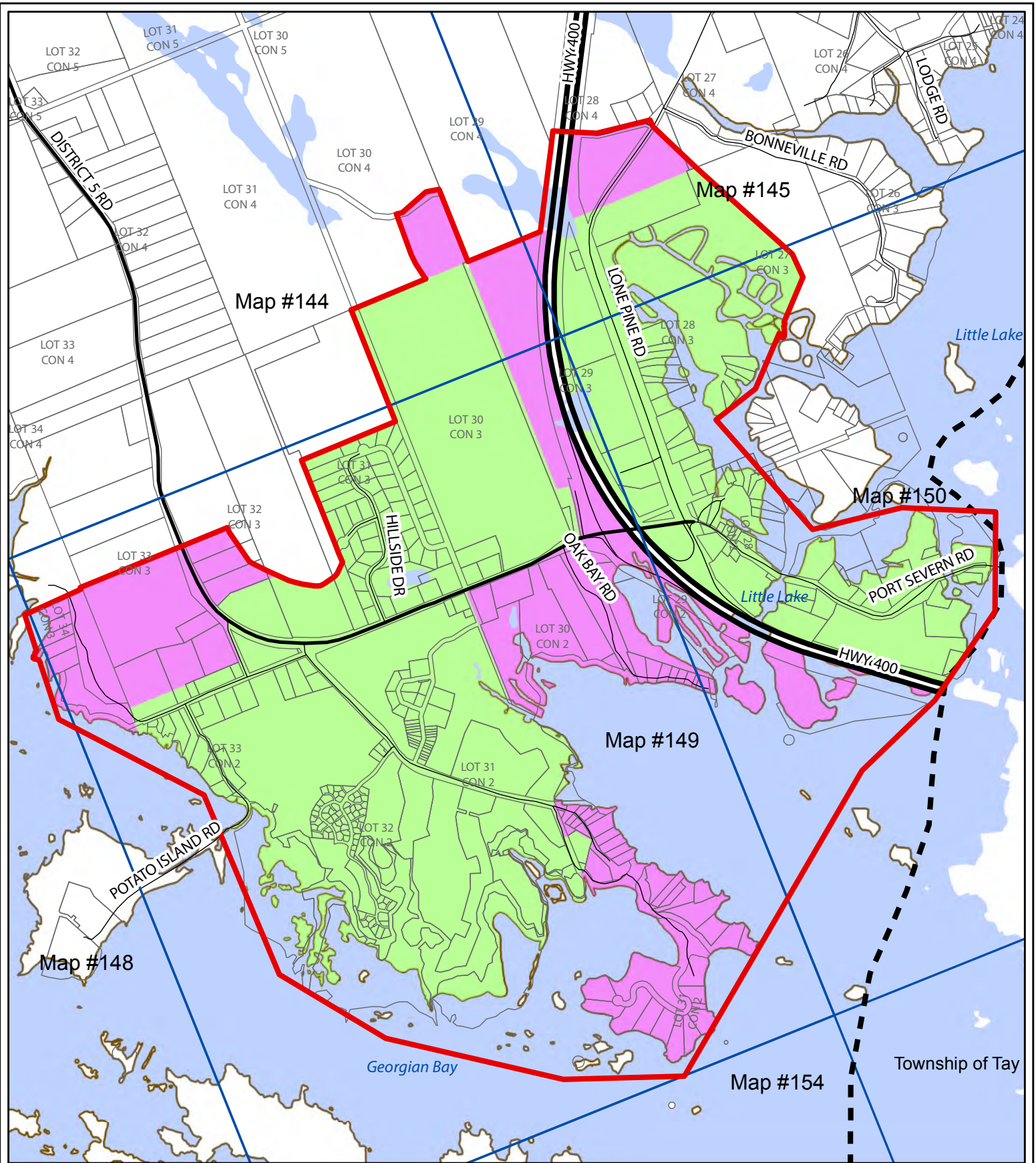
Legend

- Settlement Area
- Hamlet
- Millbrook Urban Settlement Area
- Countryside Areas**
- Agricultural
- ORM - Prime Agricultural
- Rural
- ORM - Rural
- Mineral Aggregate Extractive
- ORM - Extractive
- Rural Employment
- Commercial Entertainment
- Airport Employment
- Recreational
- Natural Heritage System**
- Natural Core Area
- ORM - Natural Core Area
- Natural Linkage Area
- ORM - Natural Linkage Area
- Oak Ridges Moraine Boundary
- Urban Rural Fringe
- Special Study Area No. 1 (See Section 2.6)
- Peterborough Airport
- Transportation**
- Freeway
- King's Highway
- County Road
- Proposed Arterial Road
- Township Road
- Private Road
- Railway






Consolidated October 6, 2015





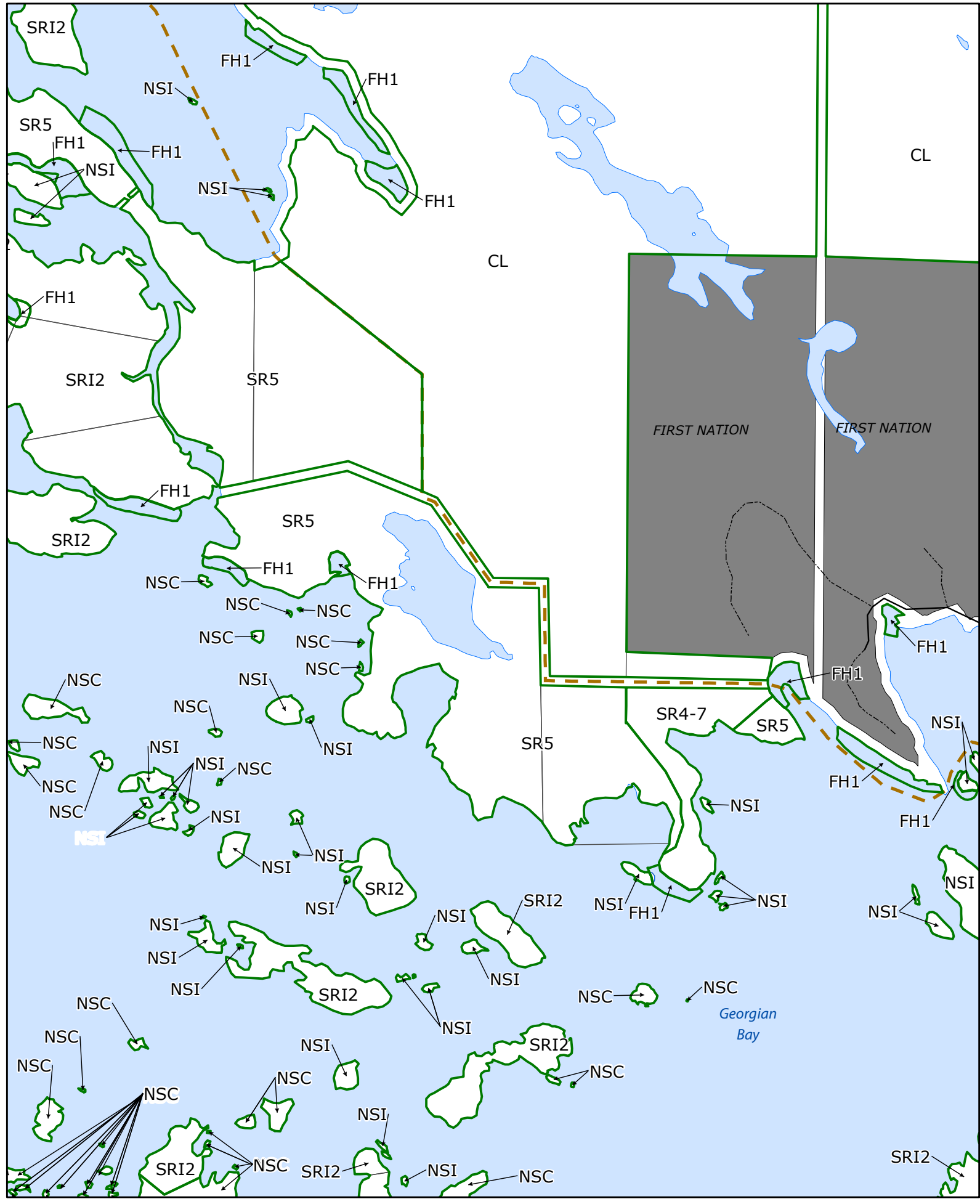


Legend

 Urban Centre Boundary

 Schedule 'A' Map #
 Township Boundary

 Phase 1 Servicing Area
 Phase 2 Servicing Area



Appendix 3

Education

University of Waterloo

Bachelor of Environmental Studies
(Honours), Urban and Regional
Planning

2003

Professional Associations

Registered Professional Planner

Full Member, Ontario Professional
Planners Institute (OPPI)

Member, Barrie – Huronia Rotary
Club

Contact

113 Collier Street
Barrie, ON
L4M 1H2

T: 705 728 0045 x222
C: 705 715 2878
jrobinson@mhbcplan.com
www.mhbcplan.com

Jamie Robinson

BES, MCIP

Jamie Robinson is a Partner with MHBC and provides planning services to a range of private and public sector clients. Mr. Robinson is a policy and regulatory specialist with expertise in the preparation of Official Plans, Zoning By-laws, Growth Management Studies, Development Charge Studies, Source Protection Planning and the submission and review of plans of subdivisions, consents, minor variances and site plans. He is familiar with the latest mapping tools available to planners and is capable of viewing planning issues from both a planning and technical perspective.

Mr. Robinson is retained by a number of municipal clients to whom he provides application review services as well as strategic advice on a variety of land use planning matters including urban issues such as growth management, intensification and redevelopment as well as rural issues related to shoreline development, lake capacity, natural heritage features and agricultural uses.

Professional History

Partner, MacNaughton Hermsen Britton Clarkson Planning Limited
(2015 – Present)

Associate, MacNaughton Hermsen Britton Clarkson Planning Limited
(2012 – 2015)

Associate, Meridian Planning Consultants (2011 – 2012)

Senior Planner, Meridian Planning Consultants (2006 – 2011)

Assistant Planner, Township of Tay (2002)



PLANNING
URBAN DESIGN
& LANDSCAPE
ARCHITECTURE

Project Experience

Mr. Robinson has been involved in a number of various Official Plan and Zoning By-law projects which include:

- City of Greater Sudbury
- City of Orillia
- Municipality of Callander
- Town of Blind River
- Town of Bracebridge
- Town of Gravenhurst
- Town of Moosonee
- Town of Saugeen Shores
- Town of St. Joseph Island
- Township of Georgian Bay
- Township of Nipissing
- Township of Seguin

Mr. Robinson has worked extensively with Development Charge Studies and has a working knowledge of the Development Charges Act and its applications for Municipalities. He has been involved in the preparation of Development Charges for a number of Municipalities which include:

- County of Dufferin
- County of Peterborough
- City of Owen Sound
- Municipality of Callandar
- Municipality of Grey Highlands
- Municipality of Sioux Lookout
- Township of Clearview
- Township of Melancthon
- Township of Mulmur

Mr. Robinson is familiar with the Clean Water Act and has undertaken Source Protection implementation exercises for the County of Simcoe, Town of Penetanguishene, Town of Midland and the Township of Tiny.

Jamie has managed the submission of a variety of development applications including official plan amendments, zoning by-law amendments, plans of subdivision, plans of condominium, consents and minor variances.

Education

Queen's University

Master of Urban and Regional
Planning (M.PI)

University of Western Ontario

Bachelor of Arts (Honours
Geography)

York University

Master's Certificate in Municipal
Leadership, Schulich School of
Business

Professional Associations

Canadian Institute of Planners
(MCIP)

Ontario Professional Planners
Institute, Registered Professional
Planner

Past Member, Planners Institute of
British Columbia (PIBC) - transferred
from OPPI in 2021

Past Director, Council of the Ontario
Professional Planners Institute

Past Chair, Governance and
Nominating Committee, OPPI Council
Standing Committee

Contact

113 Collier Street
Barrie, ON
L4M 1H2

T: 705 728 0045 x233
C: 705 309 8746
ksuggitt@mhbcplan.com
www.mhbcplan.com



Katherine E. Suggitt

M.PI, RPP, MCIP

Katherine Suggitt has been a practicing planner since 1989. Ms. Suggitt's experience includes over 30 years of diverse planning experience in public and private sectors (16 years in senior management roles), with extensive urban, rural and regional level planning, growth management, policy, and development approvals experience.

Ms. Suggitt has 20 years of growth management and integrated land use planning experience with a sound knowledge of legislation, processes and critical steps necessary to ensure inter-municipal collaboration and comprehensive engagement takes place.

Ms. Suggitt has extensive experience as a Planning and Development Services staff lead. She worked closely with the County solicitors, in leading the efforts to resolve the appeals to the County of Simcoe Official Plan through the Ontario Municipal Board proceedings. Ms. Suggitt was directly responsible for managing the complex relationships and resolving issues through extensive facilitation and mediation proceedings that she led involving nearly 100 parties including the Province, local municipalities, public groups/organizations and private sector developers.

Ms. Suggitt has created and maintained a comprehensive network of public and private sector relationships throughout her career including during her time as a Council Director on the OPPI Council.

Professional History

Associate, MHBC Planning (2023-Present)

General Manager of Development Services, Peace River Regional District, BC (2021 – 2023)

Manager of Strategic Initiatives, Policy and Analysis, City of Barrie (2018 – 2021)

Manager of Policy Planning, County of Simcoe (2008 – 2018)

Director of Planning and Development, City of Orillia (2006 – 2008)

Senior Planner, City of Orillia (2005 – 2006)

Planner/Project Manager, Private Consulting Company (2003 – 2005)

District Planner, District of Muskoka (2001 – 2003)

Planner, City of Calgary (1999 – 2001)

Assistant Planner, City of Calgary (1998 – 1999)

Planner, CIBC and CIBC Development Corporation (1989 – 1998)

Selected Project Experience

- County of Simcoe Official Plan, 2016
 - OMB case on nearly 100 appeals to County OP – resolved through facilitated negotiations (no contested hearing time)
- City of Barrie CIP for Affordable Housing
- City of Barrie MCR work, in preparation for new OP – and she was also involved in 1st Draft of new OP released in 2020 (then moved to BC in late Feb. 2021)
- North Peace Fringe Area Official Community Plan, while at Peace River Regional District, BC
- As a Director, Manager or GM, she has been involved with the reviews of many different types of development applications and responsible to approve draft plans of subdivision or condominium, site plans, etc.
- Kathy has been involved with negotiations to help resolve many OMB appeals over the years
- She has been involved with negotiations/facilitation discussions between the Province and County (facilitated by the Office of the Provincial Development Facilitator) on the Growth Plan Amendment #1 back in 2012, which introduced the Simcoe Sub-area for the first time into the Growth Plan

Appendix 4

DWELLING TYPES

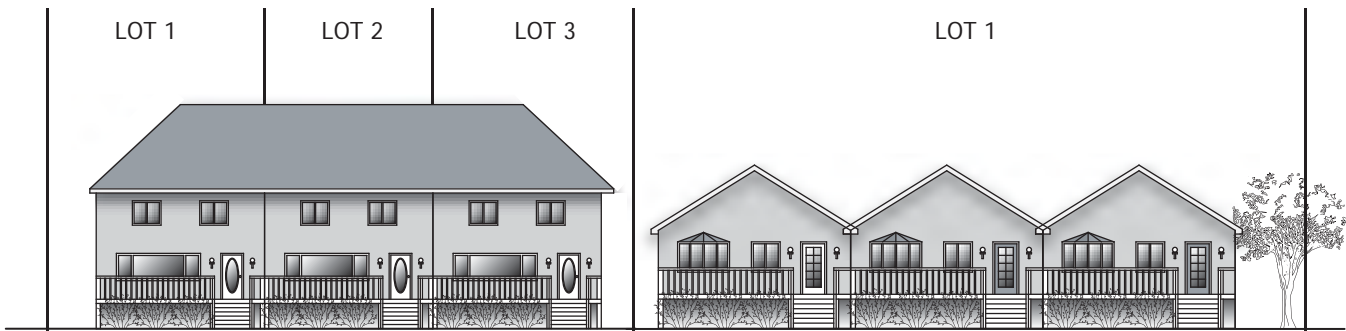


**SINGLE
DWELLING**

**SEMI-DETACHED
DWELLING**

**DUPLEX
DWELLING**

**LINKED
DWELLING**



**STREET TOWNHOUSE
DWELLING**
Each dwelling unit on a separate lot

**ROW
DWELLING**
Each dwelling unit on the same lot

MULTIPLE DWELLING TYPES

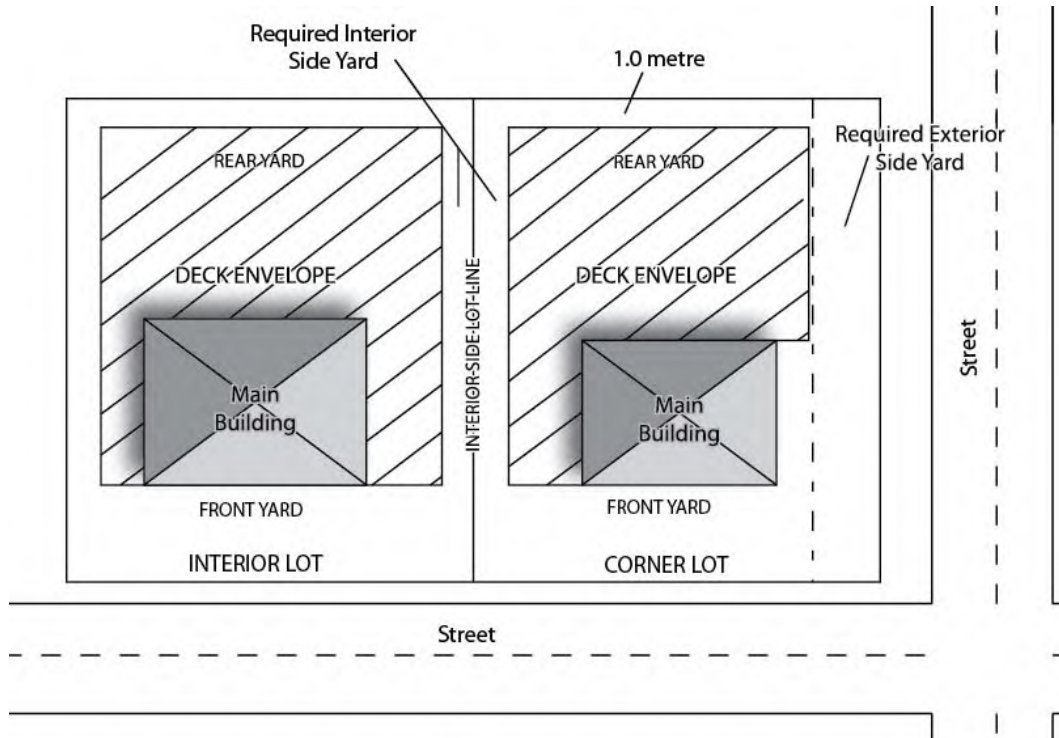
A dwelling containing three or more dwelling units
not including a row dwelling or street townhouse dwelling



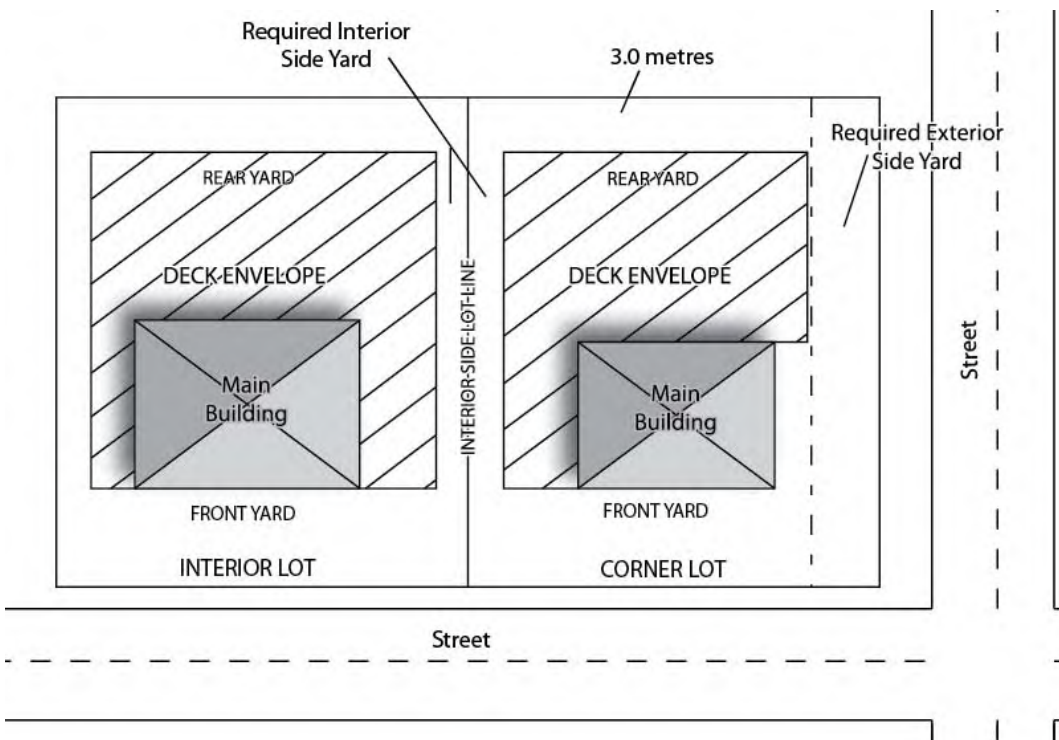
**FOURPLEX
DWELLING**

**MULTIPLE
DWELLING**

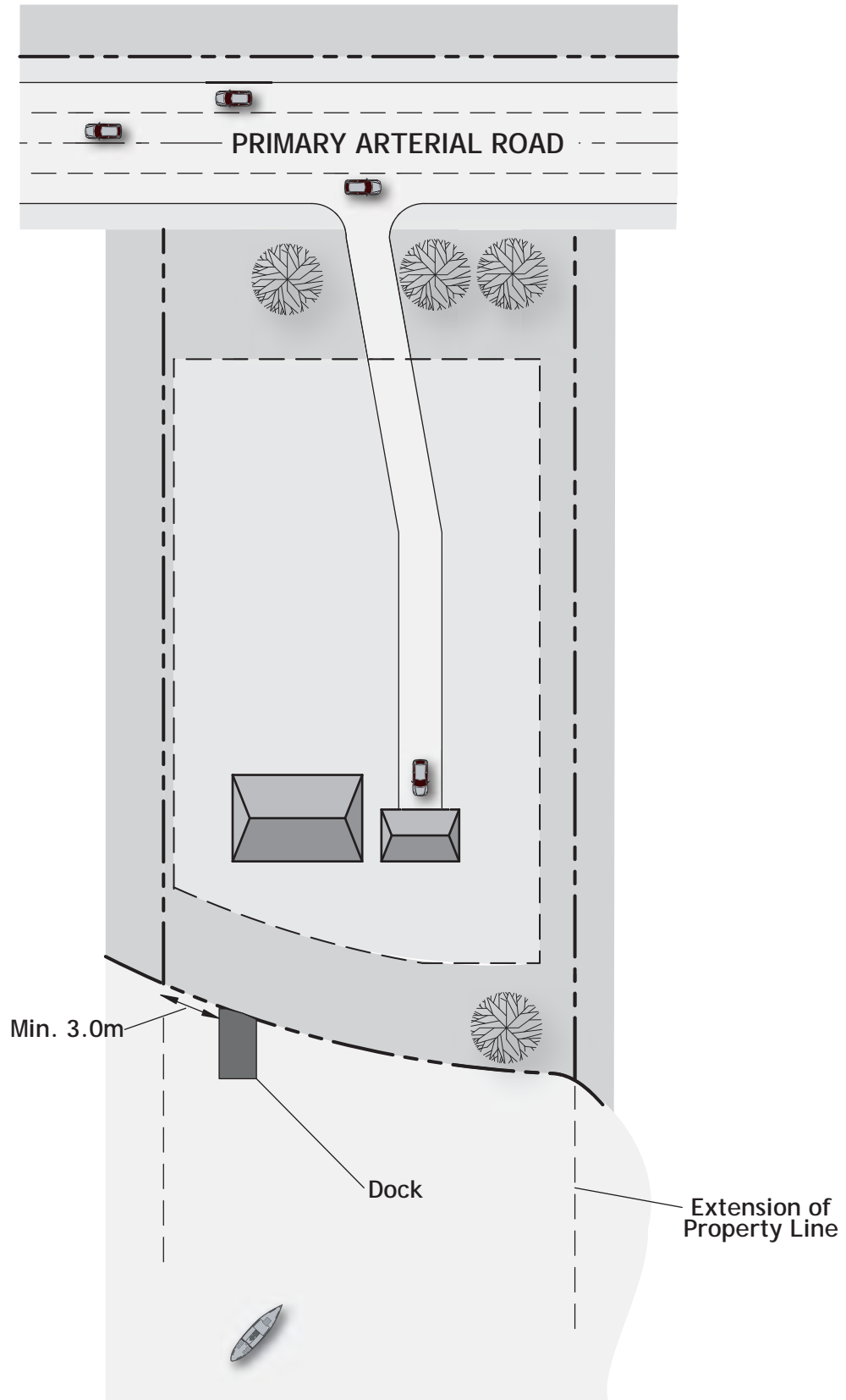
DECKS 0.6 METRES HIGH AND UNDER



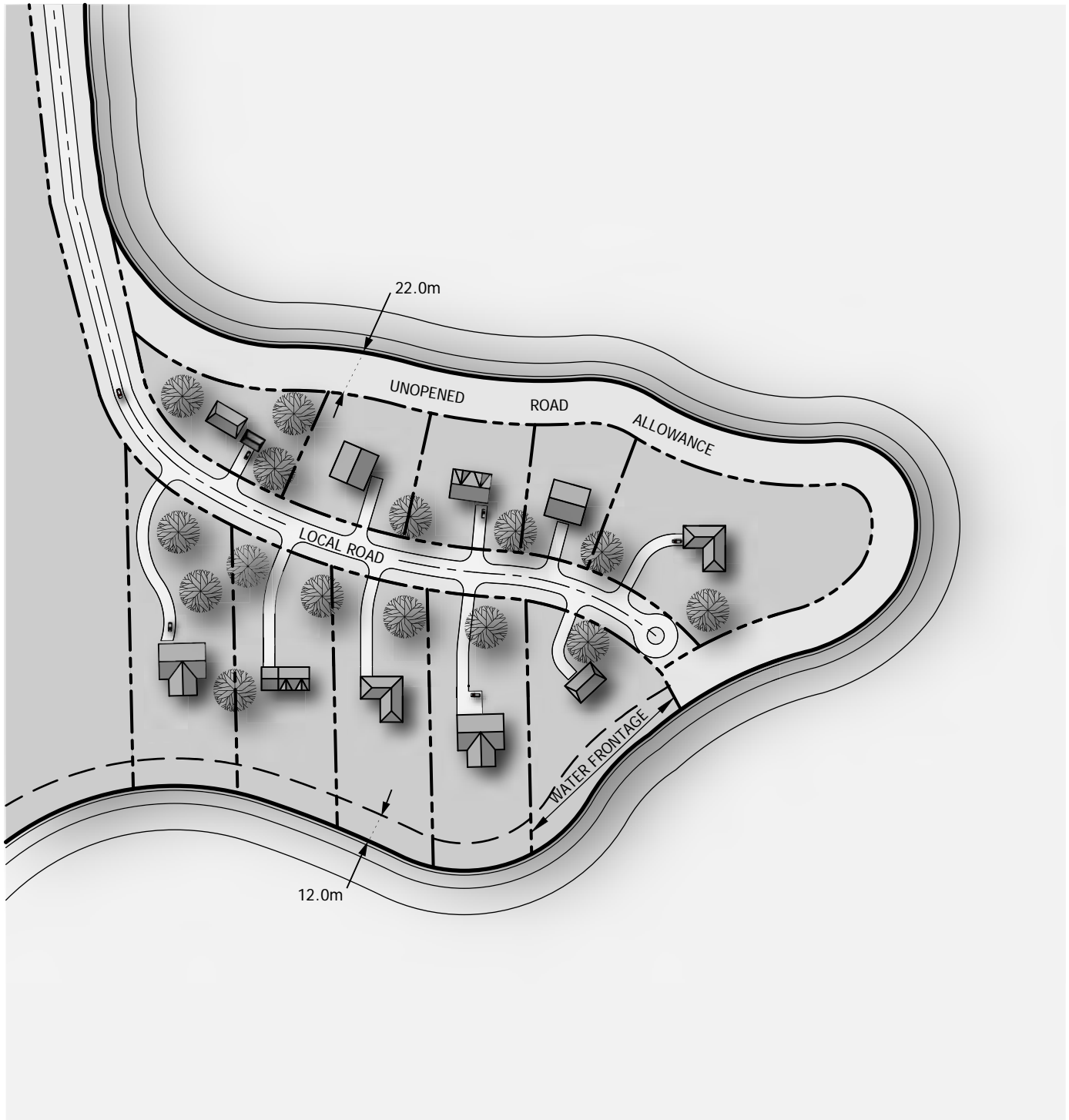
DECKS HIGHER THAN 0.6 METRES


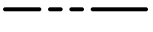



DOCK SETBACK

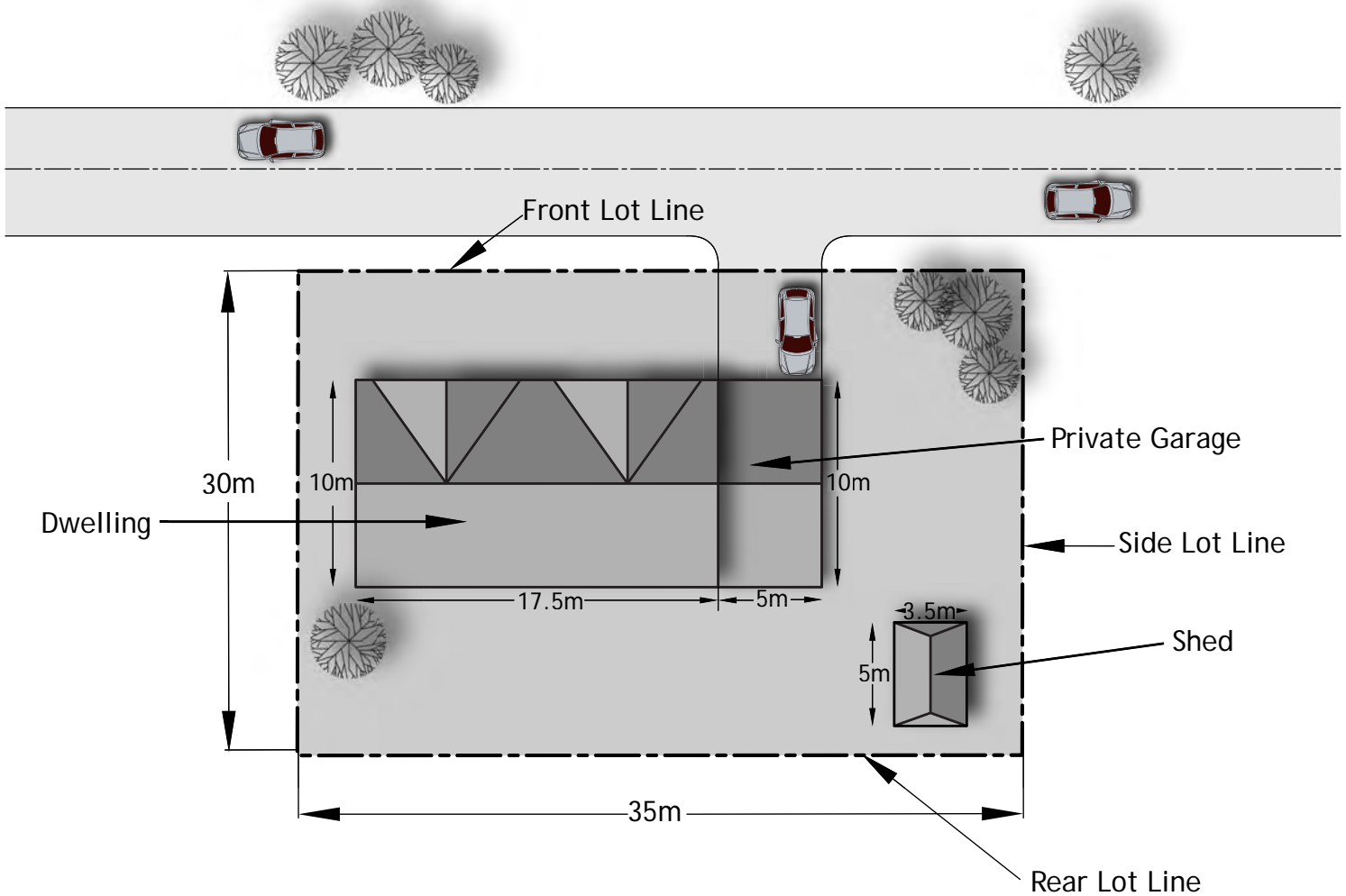


SHORELINE, CROWN RESERVE AND WATERBODY SETBACKS FOR RESIDENTIAL USES



-  SHORELINE
-  LOT LINE
-  WATERBODY SETBACKS FOR RESIDENTIAL LOTS WHERE THERE IS NO ABUTTING, UNOPENED ROAD ALLOWANCE

LOT COVERAGE



EXAMPLE

$$\text{LOT AREA : } 30.0\text{m} \times 35.0\text{m} = 1050.0\text{m}^2$$

$$\text{DWELLING : } 10.0\text{m} \times 17.5\text{m} = 175.0\text{m}^2$$

$$\text{PRIVATE GARAGE : } 5.0\text{m} \times 10.0\text{m} = 50.0\text{m}^2$$

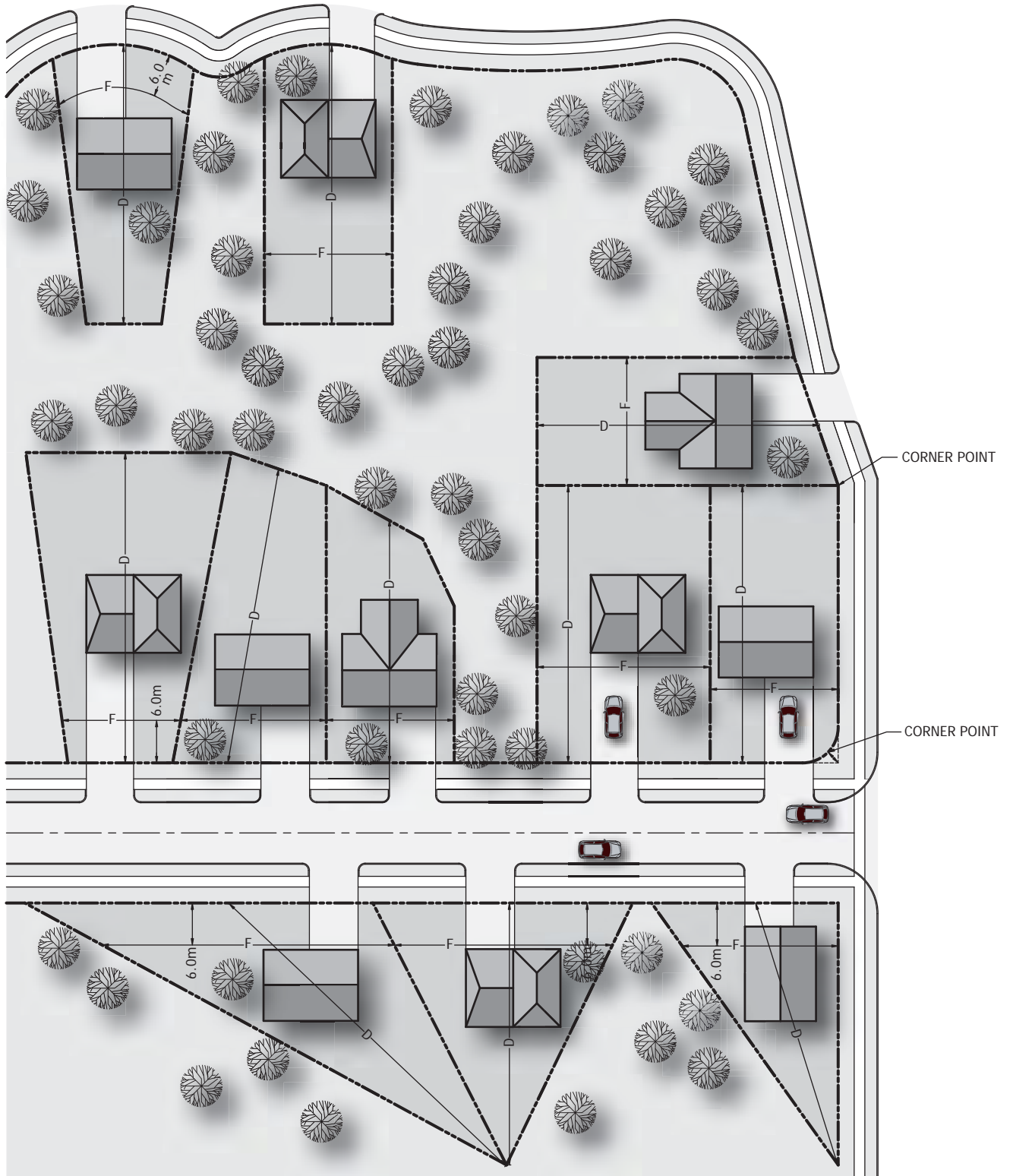
$$\text{SHED : } 5.0\text{m} \times 3.5\text{m} = 17.5\text{m}^2$$

$$\text{TOTAL} = 242.5\text{m}^2$$

$$\text{LOT COVERAGE : } \frac{242.5\text{m}^2 \text{ (Building Coverage)}}{1050.0\text{m}^2 \text{ (Lot Area)}} \times 100 \%$$

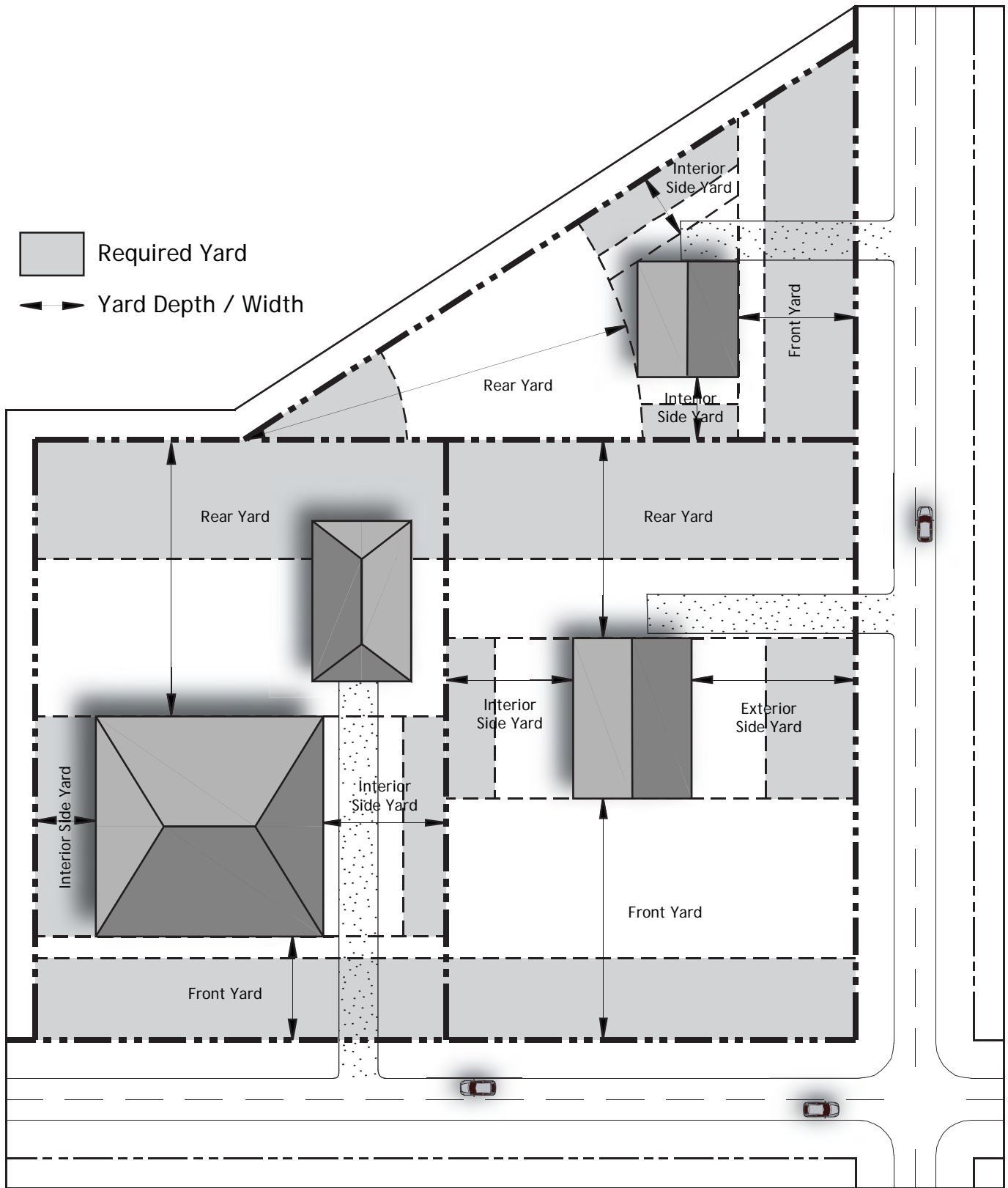
$$= 23.1 \%$$

LOT FRONTAGE AND LOT DEPTH

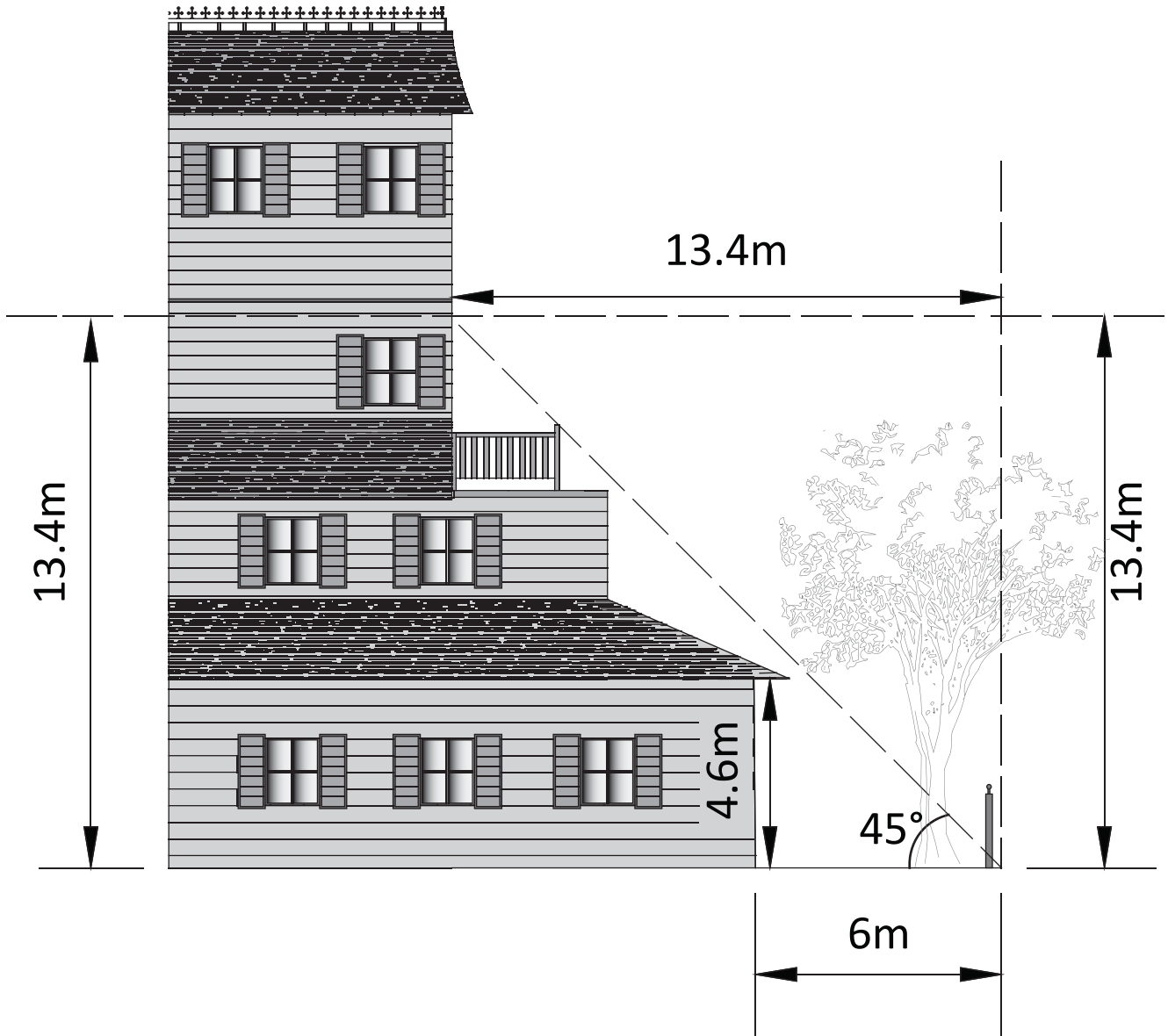


D = LOT DEPTH
F = LOT FRONTAGE

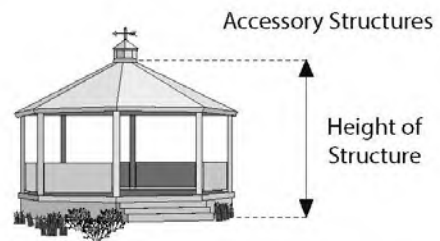
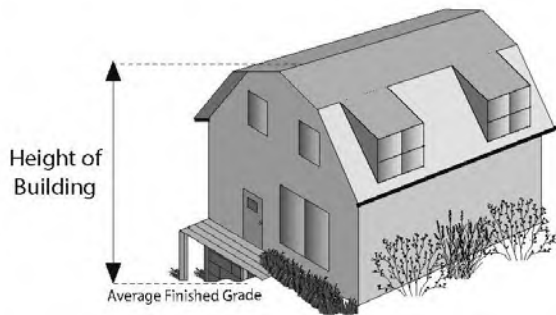
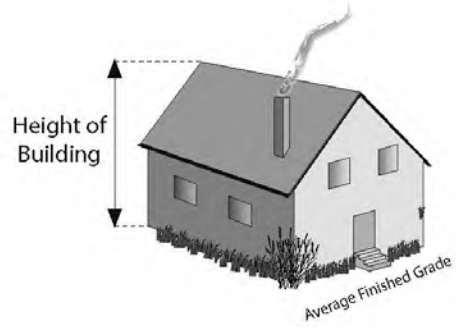
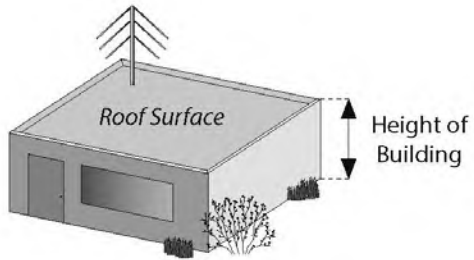
YARDS



REAR LOT LINE



Height or Building Height





This illustration does not form part of this By-law and is provided for convenience only.


Appendix A


Statement of Acceptance (Appendix A)

All responses must be signed:

I/We certify that the information provided in this RFP Response Document is true and complete. 

I/We declare that no employee of the Municipality of Whitestone is or will become interested, directly or indirectly as a contracting party or otherwise in the supplies, work or business to which it relates or in any portion of the profits thereof, or in any such supplies to be therein or in any of the monies derived there from. 

I/We further declare that the undersigned is empowered by the Proponent to negotiate all matters with the partnering municipality's representatives, relative to this Proposal. 

I/We further declare that the agent listed below is hereby authorized by the Proponent to submit this Proposal and is authorized to negotiate on behalf of the Proponent. 

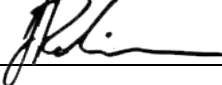
Legal Company Name:	MacNaughton Hermsen Britton Clarkson Planning Ltd
Respondent's Signature:	
Respondent's Printed Name:	Jamie Robinson
Respondent's Title:	Partner
Email:	jrobinson@mhbcplan.com
Business Phone:	705-728-0045 ext 222
Business Fax:	705-728-2010
Mailing Address	113 Collier Street, Barrie, ON L4M 1H2

Figure 1

Figure 1 - Work Plan

Municipality of Whitestone Official Plan Update

#	Task	2024		2025											
		Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Phase 1 - Background Research and Review															
1	Start-up Meeting with Municipal Staff														
2	Review of Background Information, Provincial Legislation and Plans														
3	Provincial Pre-Consultation - Identify Conformity/Policy Issues														
4	Project Initiation Meeting with Council/Section 26 of Planning Act														
5	Launch of Website/Communications and Engagement Plan														
6	Meeting(s) with Indigenous Communities														
Phase 2 - Summary Report and First Draft															
7	Discussion Paper - preparation and release for public comments														
8	Presentation of Discussion Paper														
Phase 3 - Drafting the Official Plan															
9	Preparation of Draft Policies and Official Plan Schedules														
10	Open House and Public Review														
Phase 4 - Adoption of the Final Plan															
11	Meeting with Municipal Staff														
12	Preparation of Final Official Plan														
13	Statutory Public Meeting														
14	Adoption of Official Plan														
Phase 5 - Submission to MMAH for Approval															
15	Submission to Province for Approval														

Provincial 90 day review

Figure 2

Figure 2 - Work Plan

Municipality of Whitestone Zoning By-law Update



#	Task	2026											
		Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Phase 1 - Background Review													
1	Start-Up Meeting with Municipal Staff												
2	Communication and Engagement Plan												
3	Review and Identify Issues												
4	Virtual Meeting to Provide Introduction to the Zoning By-law Review												
5	Review Historic Amendments, Minor Viance and OLT Decisions												
6	Mapping Updates												
7	Review of Definitions, Diagrams and Standards												
Phase 2 - Proposed Issues Direction													
8	Technical Memorandum												
9	Council Workshop												
Phase 3 - Draft Zoning By-law													
10	First Draft of Updated Zoning By-law												
11	Review First Draft with Municipal Staff												
12	Open House #1												
13	Second Draft of Zoning By-law												
14	Meeting with Council												
15	Statutory Open House												
Phase 4 - Final Zoning By-law													
16	Statutory Public Meeting												
17	Finalize Zoning By-law												
18	Council Enactment												

Figure 3

Figure 3 - Budget

Municipality of Whitestone - Official Plan Review



#	Task	JR	KS	PL	Tech	Total		JR	KS	PL	Tech	Total by Task
		Days	Days	Days	Days	Days		Fees	Fees	Fees	Fees	
Phase 1 - Background Research & Review												
1	Start-up Meeting with Municipal Staff											
2	Review of Background Information, Provincial Legislation and Plans											
3	Provincial Pre-Consultation - Identify Conformity/Policy Issues											
4	Project Initiation Meeting with Council/Section 26 of Planning Act											
5	Launch of Website/Communications and Engagement Plan											
6	Meeting(s) with Indigenous Communities											
Phase 2 - Summary Report and First Draft												
7	Discussion Paper - preparation and release to public for comments											
8	Presentation of Discussion Paper											
Phase 3 - Draft Official Plan												
9	Preparation of Draft Policies and Official Plan Schedules											
10	Open House											
Phase 4 - Adoption of the Final Plan												
11	Meeting with Municipal Staff											
12	Preparation of Final Official Plan Update											
13	Statutory Public Meeting											
14	Adoption of Official Plan											
Phase 5 - Submission to MMAH for Approval												
Total												

Total Cost	
Professional Fees	\$ 64,256.25
Expenses	\$ 3,000.00
Sub Total	\$ 67,256.25
HST	\$ 8,743.31
Total	\$ 75,999.56

Figure 4

Figure 4 - Budget

Municipality of Whitestone - Comprehensive Zoning By-law Review



#	Task	JR	KS	PL	Tech	Total	JR	KS	PL	Tech	Total by Task
		Days	Days	Days	Days	Days	Fees	Fees	Fees	Fees	
Phase 1 - Background Review											
1	Start-Up Meeting with Municipal Staff										
2	Communication and Engagement Plan										
3	Review and Identify Issues										
4	Virtual Meeting to Provide Introduction to the Zoning By-law Review										
5	Review Historic Amendments, Minor Viance and OLT Decisions										
6	Mapping Updates										
7	Review of Definitions, Diagrams and Standards										
Phase 2 - Proposed Issues Direction											
8	Technical Memorandum										
9	Council Workshop										
Phase 3 - Draft Zoning By-law											
10	First Draft of Updated Zoning By-law										
11	Review First Draft with Municipal Staff										
12	Open House #1										
13	Second Draft of Zoning By-law										
14	Meeting with Council										
15	Statutory Open House										
Phase 4 - Final Zoning By-law											
16	Statutory Public Meeting										
17	Finalize Zoning By-law										
18	Council Enactment										
Total											

Total Cost	
Professional Fees	\$ 61,518.75
Expenses	\$ 3,000.00
Sub Total	\$ 64,518.75
HST	\$ 8,387.44
Total	\$ 72,906.19