

Appendix A - ASI Proposal for Owner Consultation Program



February 27, 2020
rev. September 4, 2020, rev. October 16, 2020

VIA EMAIL: vcoates@brantford.ca

Victoria Coates, M.Pl
Intermediate Planner
Long Range Planning
City of Brantford

RE: Proposal for the Brantford Heritage Register Public Engagement Program, City of Brantford, Ontario

(ASI FILE: 20CH-037)

Dear Victoria:

We are pleased to submit the following proposal for a Public Engagement Program for the Brantford Heritage Register, City of Brantford, Ontario. ASI understands that the City of Brantford is seeking support in engaging property owners in a meaningful engagement program during the process of adding properties as non-designated ('listed') on the Brantford Heritage Register.

This proposal has been revised and updated to provide a strategy for virtual public engagement sessions to address reduction of in-person engagement due to the global pandemic.

This public engagement program will be conducted in accordance with the City of Brantford's *Official Plan* and will include the following: a background review and windshield survey; confirmation of each property's candidacy for listing; preparation of meeting agendas, presentation materials, and notice information; and, leading a series of public information centres.

QUALIFICATION HIGHLIGHTS

ASI was founded in 1980 in response to increasing public awareness of the importance of Ontario's heritage resources, such as archaeological sites and heritage buildings, and offers the widest array of heritage consulting services in the province, including research, planning, design, and development of cultural heritage resources.

We have completed over 5,000 projects throughout Ontario, and with a full time, permanent, staff of over 50 individuals and an additional seasonal staff of up to approximately 50 field technicians, we have the logistical and human resources necessary to bring any cultural heritage management project to fruition.

Our cultural heritage specialists, consisting of a team of dedicated and diverse professionals, offer a range of consulting services in built heritage and cultural landscape conservation, planning and management, most notably in the context of environmental assessment or land-use planning and development activities and cultural resource management plans.

PROJECT TEAM

The project team is consistent with the current Brantford Heritage Register Project team and includes Annie Veilleux in the role of Lead Cultural Heritage Specialist, Senior Project Manager and Presentation Lead, Kristina Martens in the role of Heritage Evaluation Specialist and Presentation Support, Meredith Stewart in the role of Cultural Heritage Assistant and Technical Support, and Jonas Fernandez serving as Geomatic Specialist. We have also allocated for a support staff person for the duration of the project including attendance at the Public Information Centres. Additionally, a new role is being added specifically to act as Facilitator during the Public Information Centres and will be filled by Rebecca Sciarra, Division Director, Cultural Heritage Division.

PROJECT APPROACH

The following sections outline our methodology/work program. This program has been designed to meet all the requirements of the study as efficiently and cost-effectively as possible.

The Public Engagement Program will consist of a phased approach to ensure each property owner group is an appropriate size for meaningful conversation and to adequately address questions and concerns raised by the public. This work program and costing has been scoped based on the assumption that the owners of the 738 properties recommended for listing will be engaged during this process and that the total number will be divided into eight (8) groups, organized by City Area. Each group will be engaged with separately which represents one (1) phase of the work program for a total of eight (8) phases. **These phases are anticipated to occur sequentially and at a rate of one (1) group per quarter for a total two-year project schedule.**

The workplan has been created to seamlessly transition between engagement sessions when required to be held virtually through the City's Zoom platform and in-person engagement sessions when the City is able to again host in this format.

Each phase will consist of the following tasks:

Task 1: Phase Kick-off Meeting

The project team will meet with the City of Brantford's project team via teleconference to confirm the City's objectives and process, confirm the work plan and schedule, and discuss any other aspect of the project as appropriate.

As part of the Phase 1 Kick-off Meeting the City Area groupings and prioritization order will be determined. In subsequent phases the Phase Kick-off Meeting will also include a debrief of the previous phase to inform any adjustments to the approach.

Deliverables: Meeting Agenda and Minutes



Task 2: Background Review and Windshield Survey

In order to assess any changes to the properties recommended for listing, a review of background materials including demolition permits and building permit applications will be conducted. A windshield survey will be conducted to confirm properties are unchanged from the fieldwork survey conducted in Spring 2019. Properties which are found to have been substantially altered as well as properties where there are obstructions in the current file photograph will be re-photographed.

Deliverables: None

Task 3: Confirm Property List

Based on the results of Task 2, the recommended properties for listing will be updated to remove any properties no longer recommended due to substantial changes to the property. The confirmed property list will be documented in a memorandum to the City and will include reasons for removals from the list and updated photography for properties found to be substantially altered.

Deliverables: Memorandum

Task 4: Confirm and Update Presentation Materials and Notices Template

Public meeting materials including the presentation and boards used for Group A property owner engagement will be updated as required based on Task 1. Additionally, the property information template will be updated as required based on Task 1. Materials and templates will be submitted to the City for review and comment ahead of the scheduled public information centre. Following review and comment, the materials and template will be finalized by the project team.

For public information centres which are anticipated to be conducted online, a webpage hosted by the City of Brantford should include information typically presented on boards and be referenced in the notice letter (see Task 5).

Deliverables: Draft presentation material and property information template with one round of revisions; final presentation materials and property information template

Task 5: Prepare Notices

Property specific information sheets will be prepared for inclusion with the public information centre notice letter. The City of Brantford will provide a notice letter template to the project team who will input address information. The notice letter should encourage people to review the project website ahead of the session. Property specific information sheets will include property identification information, criteria met, and historical information extracted from the existing heritage inventory. It is anticipated draft and final versions of the property information sheets will be submitted to the City for review and comment.

To prepare participants who will be attending sessions online, additional material will be developed to be sent along with the notice letter and property specific information sheets. This information will present and address frequently asked questions regarding listing properties under the *Ontario Heritage Act*.

Additionally, some people may be less likely to attend a virtual engagement session and should be appropriately informed through the project website, notice, property specific information sheet and frequently asked questions. A city contact should also be provided in the notice should people prefer to engage in one-on-one dialogue outside of a virtual meeting format.

The City will be responsible for printing and mailing notices, property information sheets and frequently asked questions sheet to property owners ahead of the public information centre.

Deliverables: Draft and final notices, frequently asked questions

Task 6: Lead and Attend Public Information Centre

The project team will prepare for and lead the public information centre to inform property owners of the Brantford Heritage Register project, the recommendations for listing, what a Heritage Register is and what being included on a Heritage Register means for property owners. The project team will be available to property owners both ahead of and following a formal presentation. The team will present information in a formal presentation, as well as facilitate and answer questions and direct questions to City staff as appropriate. It is assumed that the public information centre will be attended by Heritage Committee members who will represent the project and City of Brantford staff who will fully participate in the process. It is also assumed that City of Brantford Councillors will be present.

The following table presents the approach to the Public Information Centre for in-person and virtual sessions.

In-Person Public Information Centre	Virtual Public Information Centre
Boards will be set-up at the beginning of the session for people to review as they arrive at the meeting.	Information typically presented on boards will be provided on a webpage hosted by the City of Brantford and property owners will be encouraged to review this information ahead of time.
During the arrival period, the project team and City staff will be on hand to answer questions and converse with property owners.	To facilitate informal dialogue with property owners ahead of the formal presentation, participants may be placed into break-out rooms when they join the call. The break-out room will be facilitated by two people, ideally one project team member and one city staff member. Facilitators will be prepared with informal questions for property owners, such as, "What was your reaction when received the notice?". Each participant will be called on to talk with a time allotment provided should attendance be high. This will assist in easing participants into the formal presentation and address any immediate points for clarifications.
A formal presentation to inform property owners of the Brantford Heritage Register project, the recommendations for listing, what a Heritage Register is and what being included on a Heritage Register means for property owners	The presentation will be given in the same way as the in-person public information centre. Particular attention will be paid to the length of the presentation as participants have a shortened attention span for formal presentations given in an online format. Participants will be encouraged to input questions in the chat function during the presentation if they wish for the question and answer period.
A question and answer period will be facilitated by ASI which includes all participants. The session will be facilitated with participants be selected by the facilitator and provided with a microphone.	A question and answer period will be facilitated by ASI which includes all participants. The session will be facilitated using raise hand and chat functions.

Deliverables: None

Task 7: Phase Results Memorandum

The results of this phase will be documented in a memorandum to the City of Brantford and will include minutes of the public information centre, owner objections or desires, and summary of the final recommendations for listing on the Heritage Register.

Deliverables: Memorandum

Project Management

ASI will provide project management for the duration of the assignment to ensure an appropriate level of communication with the **City of Brantford** and that all deliverables are submitted in a timely and cost-effective manner.

COSTING AND WORK SCHEDULE

Our cost estimate (not including applicable HST) for the project is maximum **\$76,964.00** and includes eight (8) phases of work costed as detailed in the table below (a 3% increase has been applied to Year 2 professional rates). The cost estimate represents the maximum cost should all eight (8) phases of the work be completed in-person. The eight (8) phases of work are anticipated to occur sequentially and at a rate of one (1) group per quarter for a total two-year project schedule. A task breakdown for each phase is attached.

Cost estimate (not including applicable HST)

	Virtual Year 1	In-Person Year 1	Virtual Year 2	In-Person Year 2
Cost per Phase	\$8,760.00	\$8,760.00	\$9,081.00	\$9,081.00
Disbursements per Phase	\$350.00	\$700.00	\$350.00	\$700.00
Total Cost per Phase	\$9,110.00	\$9,460.00	\$9,431.00	\$9,781.00

TERMS AND DELIVERABLES

1. Attendance at any project meeting has not been included in this costing. Any required meetings will be invoiced at the hourly rates indicated above.
2. Note that the appropriate Harmonized Sales Tax (13%) will be applied to our costing, and that our terms are 30 days from the date of invoicing. Errors or requests for additional data must be reported within five days of receipt of invoice, otherwise the invoice will be assumed to be correct. Our GST Registration is #R100247485.
3. This quote will remain in effect for 90 days.
4. At the time of written confirmation, please indicate to whom the invoices should be directed.
5. ASI will produce a draft report for proponent review. Once revisions have been received, ASI will provide the client with one bound copy and one electronic version in Adobe Acrobat® (.pdf) format. PLEASE NOTE that if additional bound copies are required by the proponent, they will be produced at cost, and invoiced separately.
6. Once the final report has been submitted to the proponent, any changes to the report required as a result of comments from the municipality or changes to the proposed project will be charged at the hourly rates indicated above.
7. If ASI is delayed in the performance of its work by an act or omission of the client, a stop work order issued by a court or other public authority, labour dispute, abnormal adverse weather conditions, any public protest, blockade, agitation, or threat, or any other cause beyond ASI's control (any one or more of the foregoing being a "Delay Event"), then ASI will be afforded a reasonable extension of time commensurate with any such Delay Event to complete its work and entitled to reimbursement by the client for any reasonable costs incurred by ASI resulting from any such Delay Event. ASI reserves the right to stop the performance of its work and vacate its staff and property from the field without penalty if, at ASI's sole discretion, ASI concludes that the safety and well being of its staff and/or property and/or the integrity of ASI's work is threatened by any such Delay Event.

SUMMARY

We thank you for the opportunity to submit this proposal and look forward to continuing to work with you on this project. Should you have any questions, please do not hesitate to contact me.

Sincerely,

ARCHAEOLOGICAL SERVICES INC.



Annie Veilleux, CAHP
Manager, Cultural Heritage Division

**Completion of this form is required in order to initiate our work on this project.
Please return to Archaeological Services Inc. together with any other documentation (e.g., mapping, contact and invoicing information, etc., as identified in our tender) required for completion of the study.**

Project Confirmation and Consent Form

Project: Proposal for the Brantford Heritage Register Public Engagement Program, City of Brantford, Ontario

ASI File: 20CH-037

As the proponent, I hereby confirm that Archaeological Services Inc. is to proceed with the project as outlined in the accompanying tender/proposal dated **February 26, 2020 revised September 4, 2020 and October 16, 2020**. The cost to conduct the work program is maximum **\$76,964.00 (excluding HST)**. By signing this confirmation form, I agree to pay all invoices according to the 30-day payment schedule outlined in the proposal. This confirmation constitutes permission for Archaeological Services Inc. staff to access the study area/subject property and to carry out the activities necessary for the completion of the above project.

Proponent's Name: _____

Company & Address: _____

Tel.: _____ Fax: _____

Signature: _____

(I am authorized to bind the corporation)

Title

Please Print Name: _____

Date: _____

Please direct invoices to (if different from above):

Name: _____

Company & Address: _____


Tel.: _____ Fax: _____

Please return to:

Archaeological Services Inc.
528 Bathurst Street
Toronto, ONTARIO M5S 2P9
T 416-966-1069 F 416-966-9723



WORK PROGRAM AND PROJECT ACTIVITY CHART: BRANTFORD HERITAGE REGISTER PUBLIC ENGAGEMENT PROGRAM

PROJECT TASKS AND ACTIVITIES							TOTALS			
	A. Veilleux Lead Cultural Heritage Specialist	K. Martens Heritage Inventory Advisor and Heritage Evaluation Specialist	M. Stewart Cultural Heritage Assistant	R. Sciarra Facilitator	Support Staff	J. Fernandez Geomatics Specialist	PERSON HOURS	FEES (\$)	HST (13%)	TOTAL COSTS (\$)
	\$110.00	\$90.00	\$75.00	\$115.00	\$60.00	\$75.00				
HOURLY RATES (YEAR 1)										
Tasks per Phase										
Task 1: Phase kick-off teleconference (and debrief prior phase)	2	2					4	\$ 400.00	\$ 52.00	\$ 452.00
Task 2: Background review and windshield survey			8		8		16	\$ 1,080.00	\$ 140.40	\$ 1,220.40
Task 3: Confirm property list based on Sub-task 1.2	1		2				3	\$ 260.00	\$ 33.80	\$ 293.80
Task 4: Confirm and update presentation materials and notice template	1	1	4				6	\$ 500.00	\$ 65.00	\$ 565.00
Task 5: Prepare notices	2	4	12			4	22	\$ 1,780.00	\$ 231.40	\$ 2,011.40
Task 6: Lead and attend Public Information Centre	8	8	8	8	8		40	\$ 3,600.00	\$ 468.00	\$ 4,068.00
Task 7: Document results of PIC in a memorandum	1		2				3	\$ 260.00	\$ 33.80	\$ 293.80
Phase Total	15	15	36	8	16	4	94	\$ 7,880.00	\$ 1,024.40	\$ 8,904.40
Project Management per Phase										
Project Management	8						8	\$ 880.00	\$ 114.40	\$ 994.40
Project Management per Phase Total	8	0	0	0	0	0	8	\$ 880.00	\$ 114.40	\$ 994.40
TOTAL HOURS	23	15	36	8	16	4	102	\$ 8,760.00	\$ 1,138.80	\$ 9,898.80
Total Person Fees	\$2,530.00	\$1,350.00	\$2,700.00	\$920.00	\$960.00	\$300.00		8,760.00		
TOTAL PROJECT FEES & EXPENSES							\$8,760.00			
HST (13%)							\$1,138.80			
TOTAL PROJECT COST							\$9,898.80			

WORK PROGRAM AND PROJECT ACTIVITY CHART: BRANTFORD HERITAGE REGISTER PUBLIC ENGAGEMENT PROGRAM

PROJECT TASKS AND ACTIVITIES		ASI						TOTALS		
	A. Veilleux Lead Cultural Heritage Specialist	K. Martens Heritage Inventory Advisor and Heritage Evaluation Specialist	M. Stewart Cultural Heritage Assistant	R. Sclarra Facilitator	Support Staff	J. Fernandez Geomatics Specialist	PERSON HOURS	FEES (\$)	HST (13%)	TOTAL COSTS (\$)
HOURLY RATES (YEAR 2)	\$114.00	\$93.00	\$78.00	\$119.00	\$62.00	\$78.00				
Tasks per Phase										
Task 1: Phase kick-off teleconference (and debrief prior phase)	2	2					4	\$ 414.00	\$ 53.82	\$ 467.82
Task 2: Background review and windshield survey			8		8		16	\$ 1,120.00	\$ 145.60	\$ 1,265.60
Task 3: Confirm property list based on Sub-task 1.2	1		2				3	\$ 270.00	\$ 35.10	\$ 305.10
Task 4: Confirm and update presentation materials and notice template	1	1	4				6	\$ 519.00	\$ 67.47	\$ 586.47
Task 5: Prepare notices	2	4	12			4	22	\$ 1,848.00	\$ 240.24	\$ 2,088.24
Task 6: Lead and attend Public Information Centre	8	8	8	8	8		40	\$ 3,728.00	\$ 484.64	\$ 4,212.64
Task 7: Document results of PIC in a memorandum	1		2				3	\$ 270.00	\$ 35.10	\$ 305.10
Phase Total	15	15	36	8	16	4	94	\$ 8,169.00	\$ 1,061.97	\$ 9,230.97
Project Management per Phase										
Project management	8						8	\$ 912.00	\$ 118.56	\$ 1,030.56
Project Management per Phase Total	8	0	0	0	0	0	8	\$ 912.00	\$ 118.56	\$ 1,030.56
TOTAL HOURS	23	15	36	8	16	4	102	\$ 9,081.00	\$ 1,180.53	\$ 10,261.53
Total Person Fees	\$2,622.00	\$1,395.00	\$2,808.00	\$952.00	\$992.00	\$312.00		9,081.00		
TOTAL PROJECT FEES & EXPENSES	\$9,081.00									
HST (13%)							\$1,180.53			
TOTAL PROJECT COST							\$10,261.53			