

1.0 Executive Summary

The Town of Halton Hills has demonstrated a continued commitment to the conservation of cultural heritage resources within the community. The rich history of the Town is valued by residents and visitors alike. The Town is now seeking the services of a qualified consultant team to undertake a Cultural Heritage Master Plan for the Town. This process will provide the tools to identify, protect, and celebrate the Town's rich and diverse cultural heritage resources. It will also provide comprehensive guidance for the management of identified cultural heritage resources, including, but not limited to, cultural heritage landscapes, properties designated under Parts IV and V of the *Ontario Heritage Act*, and properties that are listed on the Town's Heritage Register.

These Terms of Reference set out the direction for the undertaking of a detailed framework for the Cultural Heritage Master Plan, describing the project goals and objectives and identifying key stakeholders and participants, roles and responsibilities, required resources, deliverables, and a proposed work program for the project.

The successful team will possess the required technical skills and experience to complete required research, analysis, and evaluations, and demonstrate excellent project management skills, community consultation, and facilitation expertise and sufficient resources to meet the project timelines.

2.0 Terminology

The following terms will apply to this Request for Proposal and to any subsequent Contract.

Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

2.1. Request for Proposal Terminology

Throughout this Request for Proposal, terminology is used as follows:

- "Contract" means the written agreement resulting from this Request for Proposal executed by the Town and the Consultant;
- "Consultant" means the successful Proponent to this Request for Proposal who enters into a written Contract with the Town;
- "Municipality/Town" means the Corporation of the Town of Halton Hills";
- "Must", "mandatory" or "required" means a requirement that shall be met in order for a proposal to receive consideration;
- "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this "Request for Proposal"; and,
- "Should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposal.

3.0 Request for Proposal Process

TBC

4.0 Project Terms of Reference

4.1. Project Summary

The Town of Halton Hills has demonstrated a continued commitment to the conservation of cultural heritage resources within the community. The rich history of the Town is valued by residents and visitors alike. The Town is now seeking the services of a qualified consultant team to undertake a Cultural Heritage Master Plan for the Town. This process will provide the tools to identify, protect, and celebrate Halton Hills' rich and diverse cultural heritage resources. It will also provide comprehensive guidance for the management of cultural heritage resources, including, but not limited to, cultural heritage landscapes, properties designated under Parts IV and V of the *Ontario Heritage Act*, and non-designated properties that are listed on the Town's Heritage Register.

These Terms of Reference set out the direction for the undertaking of a detailed framework for the Cultural Heritage Master Plan, describing the project goals and objectives and identifying key stakeholders and participants, roles and responsibilities, required resources, deliverables, and a general work program for the project.

4.2. Project Scope and Objectives

The Town of Halton Hills has identified the need for a Cultural Heritage Master Plan to provide the tools and guidance it needs to recognize and manage its cultural heritage resources. In particular, the Cultural Heritage Master Plan will achieve the following objectives:

- Articulate the goals of heritage conservation in Halton Hills;
- Develop a cohesive vision that reflects the values of the community and proposes a strategic approach to heritage conservation and the management of built heritage, cultural heritage, archaeological resources, and natural/cultural heritage landscapes and streetscapes in the Town of Halton Hills;
- Establish a relationship through meaningful engagement and consultation with Indigenous communities and identify and conserve resources that have value for these communities;
- Identify potential cultural heritage landscapes (including Heritage Conservation Districts) that contribute to the heritage value of the Town;
- Establish policies for the identification, conservation, and ongoing stewardship of the Town's heritage resources that build upon and complement the Town's existing policy framework where appropriate and recommend revisions to this framework to achieve heritage conservation objectives as required;
- Review current research and best practices that can be used by Council and municipal staff when making decisions relating to the conservation of cultural heritage resources in the Town, including recommendations in regards to the ongoing evaluation of cultural heritage resources and the update/review of the Town's Heritage Register;
- Identify strategies to identify and overcome barriers to the conservation of the Town's cultural heritage resources;
- Recommend approaches for the prioritization of research, evaluation and designation of significant individual cultural heritage resources that are currently listed on the Town's Heritage

Register or that have been identified as potential significant cultural heritage resources through prior studies and review within the Town.

4.3. Project Background

The Town of Halton Hills is rich in history and heritage, with identified built heritage resources dating back to the 1800s and many potential cultural heritage resources within the area. The Town has fostered the conservation of its built heritage resources through the establishment of its Municipal Heritage Register, developed in four Phases between 2007 and 2018. The Town's Municipal Heritage Register includes 774 listed properties, 31 properties designated under Part IV of the *Ontario Heritage Act*, and 10 properties within the Syndicate Housing Heritage Conservation District designated under Part V of the *Ontario Heritage Act*.

4.3.1. Municipal and Policy Framework

Town of Halton Hills Official Plan

Section F5 of the Town of Halton Hills' Official Plan ("Official Plan") speaks to the conservation of the Town's cultural heritage resources and states the Town's intent to identify, conserve, and enhance cultural heritage resources and that all new development occurs in a manner that respects the Town's rich Cultural Heritage. Policy F5.1.1 speaks specifically to the creation of a Cultural Heritage Master Plan (CHMP):

In order to implement the objectives of this Plan, Council may prepare a Cultural Heritage Master Plan (CHMP). Such a Master Plan would survey, inventory, examine and study the Town's cultural heritage resources. The purpose of the CHMP is to make recommendations on how the cultural heritage resources of the Town should be enhanced and protected in accordance with the goals and objectives of this Plan. In addition, the CHMP shall make recommendations on:

- a) the need for the designation of Heritage Conservation Districts in accordance with the Ontario Heritage Act and as described in Sections F5.2.4 and F5.2.5 of this Plan; and,*
- b) the need for area-specific Official Plan policies and/or zoning by-law regulations for cultural heritage areas as described in Section F5.2.6 of this Plan.*

Halton Hills Strategic Plan

The *Halton Hills Strategic Plan* ("Strategic Plan") identifies Strategic Direction D. to Preserve, Protect, and Promote Our Distinctive History, the goal of which is to preserve the historical urban and rural character of Halton Hills through the conservation and promotion of our built heritage, cultural heritage landscapes and archaeological resources. The Strategic Objectives within the Strategic Plan relating to the need for a Cultural Heritage Master Plan include:

- D.1. To require and develop a planning framework for the conservation of significant built heritage, cultural landscapes and archaeological resources.
- D.2. To encourage the preservation and enhancement of the historical character of the Town's distinctive neighbourhoods, districts, hamlets and rural settlement areas.

Heritage Halton Hills Committee

The Heritage Halton Hills Committee is the Town of Halton Hills' Municipal Heritage Committee that provides advice to Council on matters identified in the *Ontario Heritage Act*. Heritage Halton Hills is an advisory committee comprised of members of the public appointed by Council and is chaired by a member of Council. Members have diverse interests and skills and share an enthusiasm for preserving the Town's cultural heritage resources.

Heritage Halton Hills assists Council in making decisions on matters that relate to properties that have been listed on the Town's Heritage Register or designated under Part IV or Part V of the *Ontario Heritage Act*. Heritage Halton Hills also promotes heritage conservation awareness and education within the community.

Heritage Incentive Programs

The Town of Halton Hills offers two financial incentive programs to assist owners of eligible heritage properties with the cost of conservation: the Heritage Property Grant Program and the Heritage Property Tax Refund Program. These programs have assisted successful applicants in the conservation of their heritage properties within the Town of Halton Hills.

In 2020, the Town also introduced the Heritage Conservation Award Program. The Town of Halton Hills' Heritage Conservation Award is presented annually by Halton Hills Council upon the recommendation of Heritage Halton Hills, the Town's Municipal Heritage Committee. This award acknowledges significant contributions to the conservation of the Town's cultural heritage resources through preservation, rehabilitation, and restoration.

4.4. Time Frames

The project is expected to take 24 months over two phases to complete, following its awarding to the successful consultant team.

4.5. Proposed Work Plan

These Terms of Reference will serve as a framework to guide the preparation of a more detailed work plan by the selected Project Consultant. This detailed Work Plan will be reviewed and approved by the Project Team, in consultation with the Technical Advisory Committee.

A chart summarizing the deliverables for the project is attached in Appendix *.

The final deliverable for the project will be a Cultural Heritage Master Plan in accordance with the requirements of the Halton Hills Official Plan.

All electronic documents and reports prepared for and submitted to the Town shall be compliant with the Accessibility for Ontarians with Disabilities Act, 2005, as may be amended.

An overall communication strategy will be prepared for this project by the Town with the assistance from the consultant. Notice will be given to the public of the commencement of the project. This will include creating a project website, a Let's Talk Halton Hills page and placing a newspaper notice in the local newspapers.

4.5.1. Project Phases

It is expected that the development of a Cultural Heritage Master Plan for the Town of Halton Hills shall be undertaken in two (2) phases, although this is simply a guide and the exact work plan may be subject to refinement based on submissions received and further discussions with the successful Consultant.

A general overview of the phases is outlined below:

Phase 1: Project Initiation & Background Review

Phase 1A: Project Initiation

Phase 1A will consist of the Consultant collecting and reviewing all relevant background information and undertaking appropriate initial notification and consultations with the public, municipal Departmental staff, municipal advisory committees, agencies, and other stakeholders. This task will enable the Consultant to understand the current issues, trends, facts, assumptions, opportunities and constraints affecting the planning and management of the Town of Halton Hills' cultural heritage resources.

This phase will include a review of the policies and guidelines that have been developed and implemented by the municipality in order to achieve the goals of heritage conservation. An objective of the Cultural Heritage Master Plan process is to update and consolidate the Town of Halton Hills' various guidelines related to cultural heritage management and planning. As such, it is expected that the Consultant will develop a thorough understanding of these municipal policies and guidelines and how they relate to best practices. These and other municipal documents are available as a resource for the successful Consultant (see Appendix *).

Project Charter

This initial task will include the completion and agreement on the contents of a Project Charter between the Town and the Project Consultant, setting out agreed upon roles and responsibilities of each stakeholder. This task will be carried out by the Town. The Consultant Team will provide input to the Town as required to assist in the preparation of the charter.

Project Kick-off Meeting/Work Program

This task will involve a start-up meeting with the Project Consultant Team to review and finalize a detailed work program for the project, based upon the proposed work program contained in the chosen consultants' proposal. Members of the Technical Advisory Committee as well as other key town staff will be in attendance. The work program will need to be revised as required to incorporate comments provided at the Kick-off Meeting.

Communications and Community Engagement Strategy

An overall Communications and Community Engagement Strategy will be prepared for this project by the Town with the assistance of the Project Consultant who will support content generation and key messaging as required. Notice will be given to the public of the commencement of the project as well as opportunities for engagement in adherence to the Town's Public Engagement Charter.

Online consultation will utilize the Town's engagement platform, letstalkhaltonhills.ca. The consultant will provide content and will be required (as applicable) to respond to queries posted on the site.

Town staff will manage all promotion and advertising (print and/or digital to be determined). The Town's channels (website, social media, e-newsletters etc.) will be utilized and managed by the Town's Communications staff. The Town will prepare any public-facing material required and vet content provided from the consultant.

Indigenous Engagement Strategy

An Indigenous Engagement Strategy will be required for those communities that have historically lived on the land now located within the Town of Halton Hills. A detailed plan should be provided that identifies the Project Consultant's experience with the Mississaugas of the Credit, Six Nations, and Haudenosaunee communities. This Strategy should identify the level of engagement for the study, relationship-building opportunities throughout each phase, strategies, and a clear communications and tracking plan throughout the study.

Phase 1A Deliverables:

- Project Charter
- Project Kick-off Meeting
- Detailed Work Program
- Content for Project Website/Social Media/Newspaper
- Indigenous Engagement Strategy
- Approximately three (3) coordination meetings with the Project Manager in person or via conference call are anticipated for this phase.

Phase 1B: Background Review & Existing Conditions Report

This Phase entails a review of relevant background material to provide a sound basis for developing the proposed Cultural Heritage Master Plan and the preparation of an Existing Conditions Report.

Existing Conditions Report

The successful Project Consultant will prepare an Existing Conditions Report which provides pertinent information on various municipal, regional and provincial policies and their implications on the study, an overview of the history of the Town of Halton Hills, and identification of the Town's existing inventory of cultural heritage resources including the Heritage Register and previously-identified potential cultural heritage resources (for a list of pertinent background information see **Appendix ***).

The Project Consultant, with the support of appropriate Town staff will present the Existing Conditions Report to the Technical Advisory Committee and the Steering Committee. Any revisions that are necessary to the Existing Conditions Report flowing from the Committee consultation will then be

undertaken prior to proceeding with a Public Open House. The Public Open House presents the first opportunity to actively engage residents and stakeholders in the Cultural Heritage Master Plan development. All public comments are to be summarized and analyzed through the preparation of a Public Consultation Paper. Input from the public will be considered prior to the Background Paper being finalized.

Phase 1B Deliverables:

- Draft Existing Conditions Report (electronic)
- Public Consultation Paper (electronic)
- Approximately two (2) revisions to the documents listed above will be required to capture comments from Staff, the Technical Advisory Committee and Steering Committee.

Phase 2: Cultural Heritage Master Plan – Draft and Final Report

This phase will involve further analysis of key findings identified during Phase 1, which will form the basis for the preparation of a draft Cultural Heritage Master Plan.

Phase 2A: Draft Cultural Heritage Master Plan

This phase will involve further analysis of key findings identified during Phase 1, which will form the basis for the preparation of a draft Cultural Heritage Master Plan. In addition to presentations to the Technical Advisory Committee, Steering Committee, and Council, one (1) public open house will be conducted at the end of this phase to inform the stakeholders of the information produced to date, and to seek further input on the draft Cultural Heritage Master Plan.

Phase 2A Deliverables:

- Draft Cultural Heritage Master Plan (electronic)
- Presentation to the Technical Advisory Committee
- Presentation to the Steering Committee
- Presentation to Council
- Public Open House/Workshop
- Approximately two (2) revisions for the draft Cultural Heritage Master Plan will be required to capture comments from the project team, Technical Advisory Committee, and the Steering Committee members.

Phase 2B: Final Cultural Heritage Master Plan

Based on the feedback obtained during the prior phases, the Consultant will refine the draft Cultural Heritage Master Plan for final consideration by the Technical Advisory Committee and Council. A public meeting will be convened to review the final Cultural Heritage Master Plan prior to final adoption.

Phase 2B Deliverables:

- Public Meeting Presentation
- Final Cultural Heritage Master Plan
- Council Presentation
- Approximately two (2) revisions to the documents listed above will be required to capture comments from the Technical Advisory Committee and Steering Committee members.

Responsibilities of the Town

The Policy Division of the Town of Halton Hills Planning and Development Department will be responsible for leading and managing the completion of the Cultural Heritage Master Plan project. Under the direction of the Director of Planning Policy, the Senior Heritage Planner will coordinate and supervise the completion of the project. Responsibilities of the Senior Heritage Planner will include:

- Coordinate a Technical Advisory Committee;
- Coordinate a Steering Committee;
- Ensure financial resources are well managed;
- Ensure compliance with the Terms of Reference;
- Ensure participation of all stakeholders;
- Chair Technical Advisory and Steering Committee meetings;
- Coordinate communications;
- Assist with Indigenous Engagement;
- Coordinate public consultation programs;
- Update online information;
- Prepare status reports to Council; and,
- Coordinate with other studies as appropriate.

Consultation and Community Engagement

Consultation with key stakeholders/agencies and public engagement are critical components for the development of the Cultural Heritage Master Plan.

Town staff will organize a Technical Advisory Committee and Steering Committee. Town staff and the Project Consultant will ensure that material for public consultation is coordinated with/developed by the Town's Communication Division.

The role of the Technical Advisory Committee is as follows:

- Provide comments during the study process;
- Assist with issue identification and resolution;
- Members to liaise with their respective organizations to ensure study awareness and to provide one-window coordination on behalf of their organization;
- Provide data input;
- Meet on a regular basis to monitor the progress of the study.

The Project Technical Advisory Committee shall include the following members:

- Town of Halton Hills' staff representing the following Departments and Sections;
 - Planning and Development – Senior Heritage Planner, Senior Planner – Policy, and Planner – Development Review
 - Culture
 - Economic Development and Tourism
 - Sustainability
 - Communications

The role of the Steering Committee is as follows:

Cultural Heritage Master Plan Terms of Reference – Draft

- Meet on a regular basis to monitor the progress of the study;
- Provide comments during the study process;
- Assist with issue identification and resolution;
- Members to liaise with their respective organizations or communities of interest, both to ensure broad community awareness of the project and to obtain broader community input;
- Awareness of the project and to obtain broader community input.

The Project Steering Committee shall include the following members:

- Mayor (ex-officio)
- Local Councillor and Chair of the Heritage Halton Hills Committee
- Heritage Halton Hills representative (1 alternate)
- Heritage Foundation of Halton Hills representative (1 alternate)
- Esqueping Historical Society representative (1 alternate)
- Community Residents (3 representatives)
- Community Landowners – Development Interests (3 representatives)

Public comments will be considered throughout the planning process. Opportunities for public consultation and community engagement have been incorporated throughout the study phases, in addition to meaningful Indigenous Engagement throughout the study. The Public Consultation Strategy for the Cultural Heritage Master Plan must conform to the Town's Public Engagement Charter. The Town's Communications staff will ensure a broad, comprehensive and timely promotion of all opportunities for consultation which will be outlined in the strategy developed for this project.

Budget

An upset limit of \$150,000.00 is approved and allocated for the Cultural Heritage Master Plan in the Town's Capital Budget.