

December 12, 2006

Ms Lilli Duoba, Senior Project Coordinator  
Environmental Planning and Rouge Park  
Development Services Commission  
Town of Markham  
101 Town Centre Boulevard  
Markham, Ontario L3R 9W3



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**Re: Environmental Policy Review and Consolidation  
Amended Work Program and Fee Estimate**

Dear Lilli:

Further to your request, Schollen & Company Inc. is pleased to submit this letter that describes our proposed amended work program and updated fee estimate for the Environmental Policy Review and Consolidation assignment. The work program has been amended in response to the revised terms of reference for the study prepared by the Town of Markham (December 2006 Draft). As discussed in reviewing the terms of reference, we have identified several tasks which will require the specific expertise of a consulting ecologist / natural heritage specialist. In response, we have elected to add North-South Environmental Inc. to our team to address tasks related to ecological inventory and assessment, natural heritage system planning, implementation of ecosystem enhancement initiatives as set out in the Rouge and Duffins Creek Watershed plans, and preparation of recommendations related to vegetation community monitoring. North-South Environmental also have considerable experience in the development of environmental policies. We have also included in our work program provision for the participation of an agricultural consultant (Harry Cumming) to provide expertise to assist in developing a policy framework for ensuring conformity with the Greenbelt Act with respect to agricultural classification.

We have worked successfully with North-South Environmental on a number of projects throughout the GTA and including several projects within the Rouge watershed. North-South Environmental provided expert testimony on behalf of the Town of Richmond Hill at the recent North Leslie Ontario Municipal Board Hearing<sup>i</sup> and as such the firm has an excellent understanding of the ecological characteristics of the Rouge watershed and is familiar with the Rouge Watershed Strategy, Rouge North Management Plan, Rouge River Watershed Plan (draft) and TRCA's Terrestrial Natural Heritage Strategy. North-South Environmental is currently developing a Regional Natural Heritage System for the Region of Halton that includes review and incorporation of the Greenbelt designations. This is being undertaken as part of Halton's long-term growth management initiative responding to Places To Grow, and is being coordinated by Meridian planning. North-South Environmental is also very familiar with the ORM Conservation Plan having undertaken peer reviews of ORM conformity studies for several municipalities and is working on environmental projects on the ORM that require conformity to the ORMCP. We are also familiar with Mr. Cumming's work through our involvement of the Eastern Markham Strategic Review.

Since the initiation of the original assignment, The Planning Partnership and Meridian Planning have undertaken a number of studies that deal with the implementation of the Greenbelt Plan, the Growth Plan of TRCA's recent watershed strategies. The Planning Partnership has recently been dealing with the implementation of TRCA Watershed Strategies in new Secondary Plans in Ajax, as well as issues related to Greenbelt Plan and Growth Plan conformity in the ongoing Official Plan Review on behalf of the Town of Ajax. Recent work on behalf of the Town of Georgina is expected to result in an Amendment to the Greenbelt Plan in Keswick, and the implementation of the Maskinonge River Remediation Strategy.

<sup>i</sup> The decision on this hearing was recently released and the Board ruled in favour of the Town in all issues related to environment.

Meridian is currently retained by the Region of Halton to implement the Growth Plan and oversee the preparation of 15 land use related studies (one of which is North-South's environmental study) that are designed to determine how the additional population allocated to Halton will be accommodated. A Greenbelt Plan conformity exercise will also be undertaken. In addition, Meridian recently completed the Greenbelt Official Plan Review and has now been retained to implement the Greenbelt Plan into their new comprehensive zoning by-law. Lastly, Meridian had been retained by Milton to both prepare a new Official Plan and implement the Greenbelt Plan as well. Meridian was also retained by Burlington to assist in establishing their Urban Growth Centre boundary and will be doing the same for Milton as part of their Official Plan Review.

The Planning Partnership and Meridian Planning Consultants joined together for this work to take advantage of both firm's environmental planning experience specific to Markham, and to use their collective experience from numerous other jurisdictions throughout the GTA, and beyond. We believe that the collective body of experience will ensure that the Town of Markham receives the best possible planning policy advice, utilizing leading edge techniques, some pioneered in Markham and refined in other municipalities and vice versa. Both Ron and Nick, former business partners, have worked extensively together, and with Town of Markham staff. Their collective body of work on environmental issues in the Town of Markham has previously resulted in the Town of Markham Natural Features Study and Official Plan Amendments for the Rouge Park and for the Oak Ridges Moraine. In addition, both Ron and Nick have worked on other projects for the Town, including the Urban Boundary Expansion Study, Secondary Plans for Area 1B, Woodbine North, Box Grove and Markham Village and on a number of zoning by-laws, including the Urban Expansion Area and Markham Centre by-laws. For this project, the primary responsibility on issues of planning policy, including the preparation of all necessary documentation, will be with Ron Palmer of The Planning Partnership. However, Nick will be relied upon for his expertise in dealing with Greenbelt and Growth Plan conformity issues in other municipalities, including Halton Hills, Milton, the Region of Halton, Cobourg and Port Hope. Both Ron and Nick will also work, collaboratively with with Town staff on all aspects of the policy review and preparation exercise.

To facilitate the preparation of this amended proposal, a review of our original proposal was completed to verify the status of completion of the work program contained therein. The following provides an itemized list of the tasks that comprised the original work program along with an indication of the status of completion of each task.

Task	Status
<b>Phase 1 – Review and Assessment of Rural Area Policy Approach and Mapping</b>	
1.1 Project Initiation Meeting	Completed
1.2 Review of Background Documents	Completed
1.3 Compilation and Comparative Assessment of Guidelines, Policies and Recommendations	Completed
1.4 Creation of Base Mapping – Review and Consolidation of Inventory Information	Completed
1.5 EPRTAC Work Session – Background	Not yet commenced
1.6 Ground Truthing	Completed
1.7 Confirmation of Vision and Objectives	Not yet commenced
1.8 Preparation of Draft Background Document	Completed
1.9 Client Review Meeting – Background Document	Completed
1.10 Review Meetings – Background Document	Completed
1.10A EPRTAC Review Session – Afternoon	Not yet commenced

1.10B	Public Review Session – Evening	Not yet commenced
1.11	Finalization of Background Document and Consolidated Inventory Mapping	60% Completed
1.12	Generation of Natural Heritage System / Greenlands Concept Plan	Not yet commenced
1.12A	Delineation of the Approximate Boundary of Rouge Park	Not yet commenced
1.12B	Generation of Draft Natural Heritage / Greenlands System Concept Plan – Project Team Work Session	Not yet commenced
1.13	Client Team Review – Draft Concept Plan	Not yet commenced
1.14	Development Services Committee Presentation	Not yet commenced
1.15	Review Sessions – EPRTAC and Public – Draft Concept Plan	Not yet commenced
1.16	Finalization – Natural Heritage / Greenway System Concept Plan	Not yet commenced

Phases two and three of the work program have not yet been initiated.

Although many of the tasks within Phase 1 of the work program have been completed, to address the review and integration of recently prepared documents such as the Rouge Watershed Strategy, Rouge River Watershed Plan (draft), Duffins Creek Watershed Plan, TRCA Terrestrial Natural Heritage Strategy, Places to Grow and Clean Water Act, there will be a need to refine and update portions of some of the tasks within Phase 1. The updated work program makes provision for this activity. The following provides a description of the tasks that comprise the revised and updated work program for this assignment. Please refer to our original proposal for a detailed description of each task.

#### **Phase 1 – Review and Assessment of Rural Area Policy Approach and Mapping**

##### **Task 1.1 Project Restart Meeting**

Meeting to review and confirm objectives, timelines, process and deliveries based on updated Terms of Reference.

##### **Task 1.2 Review of Background Documents**

Review of Places to Grow and the Growth Plan for the Golden Horseshoe Area, Clean Water Act and the Source Water Protection Planning documents, Greenbelt Act and Greenbelt Plan, Rouge River Watershed Plan (draft), Duffins Watershed Plan, Region of York Significant Woodlands Study, Markham Small Streams Study (draft), OPA No. 117 (Oak Rides Moraine), OPA No. 140 (Rouge North Management Area) and TRCA Terrestrial Natural Heritage Strategy (draft).

##### **Task 1.3 Compilation and Comparison Assessment of Guidelines, Policies and Recommendations**

Integration of findings of review (Task 1.2) into comparative analysis matrix.  
Identification of policy gaps.

##### **Task 1.4 Creation of Base Mapping for all natural heritage features and policy areas – Review and Consolidation of Inventory**

Acquisition of mapping for Greenbelt, Terrestrial Natural Heritage Strategy (draft), sensitive groundwater features and other relevant new mapping and incorporation into database.

##### **Task 1.5 EPRTAC Work Session**

Carry over from original proposal.

##### **Task 1.6 Ground Truthing**

Ground Truthing to confirm existing natural heritage features boundaries and note discrepancies.

- Task 1.6B Delineation of Small Streams Features (New Task)**  
Map / aerial photography reconnaissance and ground truthing to delineate Small Streams features within the Town's rural area.
- Task 1.7 Delineation of Approximate Boundary of Rouge Park**
- Carry over from original proposal
  - Supplementary work to address additionally technical inventory information gathered in the course of TRCA preparation of the Terrestrial Natural Heritage Strategy (draft) Watershed Strategies and integration of new Greenbelt delineation mapping.
- Task 1.8 Confirmation of Vision and Objectives and Targets**  
Carry over from original proposal.
- Task 1.9 Preparation of Background Document**  
A draft background document will be prepared. This document will address the following:
- summary of the findings of the review of the various background documents
  - matrix that provides a comparison of the various guidelines and policies in force or proposed
  - mapping illustrating the consolidation of existing inventory information and findings of the ground truthing exercise
  - mapping illustrating the findings of the Small Streams delineation
  - mapping illustrating the appropriate boundary of Rouge Park
  - composite mapping combining all of the various layers of inventory that will illustrate the framework for the Town's Greenlands system
  - a statement of the vision, objectives and targets for the Greenlands / natural heritage system.
- Task 1.10 Client Review Meeting – Background Document**  
Meeting to review the revised / updated background document.
- Task 1.11A ERPTAC Review Session – Background Document**  
Carry over from original proposal.
- Task 1.11B Public Review Session – Background Document**  
Carry over from original proposal.
- Task 1.12 Finalization of Background Mapping and Consolidated Inventory Mapping**  
Addition of new mapping / data into map database.
- Task 1.13 Generation of Draft Natural Heritage / Greenlands System Concept Plan – Project Team Work Session**  
Carry over from original proposal with provision for input from North-South Environmental.
- Task 1.14 Client Team Meeting**  
Carry over from original proposal with provision for participation from North-South Environmental.
- Task 1.15 Development Services Committee Presentation**  
Carry over from original proposal.
- Task 1.16 Review Sessions – EPRTAC and Public – Draft Concept Plan**  
Carry over from original proposal with provision for participation from North-South Environmental.

- Task 1.17 Finalization – Natural Heritage / Greenway System Concept Plan**  
Carry over from original proposal with provision for participation from North-South Environmental.

## **Phase 2 – Confirmation of a Consolidated Approach to National Heritage Features Policies and Monitoring Protocols**

- Task 2.1 Exploration of Policy Approach**  
Carry over from original proposal with provision for involvement from North-South Environmental and integration of new guideline documents and legislation.
- Task 2.1A Preparation of Specific Draft Policies, and Review of Land Use Designations/Categories**  
Carry over from original proposal with provision for input from North-South Environmental and Harry Cummings and expanded scope for the Planning Partnership, Meridian Planning and Schollen & Company Inc. to address:
- Greenbelt conformity including greenbelt agricultural policy
  - Draft Rouge Watershed Strategy
  - Duffins Creek Watershed Plan
  - Conformity to the Growth Plan for the Greater Golden Area
  - Groundwater protection policies as per Clean Water Act
  - Conformity to the Provincial Policy Statement
  - Draft Small Streams Study policies (if required)
- Task 2.1B Work Session with Town Staff**  
Carry over from original proposal with provision for participation from North-South Environmental.
- Task 2.2 Preparation of Draft Monitoring Protocol**  
Carry over from original proposal with expanded scope for Schollen & Company Inc. and North-South Environmental to address vegetation community monitoring strategy.
- Task 2.3 Client Review Session**  
Carry over from original proposal with provision for attendance by North-South Environmental.
- Task 2.4 Finalization of Policy Document**  
Carry over from original proposal with provision for input from North-South Environmental and expanded scope for the Planning Partnership, Meridian Planning and Schollen & Company Inc. to address recent guidelines and legislation.

## **Phase 3 – Draft Official Plan Amendment and Public Consultation**

- Task 3.1 Preparation of Draft Official Plan Amendment Framework**  
Carry over from original proposal with provision for input from North-South Environmental and expanded scope for the Planning Partnership, Meridian Planning and Schollen & Company Inc. to address recent guidelines and legislation.
- Task 3.2 Preparation of Final Monitoring Protocol**  
Carry over from original proposal with provision for input from North-South Environmental and expanded scope for the Planning Partnership, Meridian Planning and Schollen & Company Inc. to address vegetation monitoring strategy.
- Task 3.3 Client / EPRTAC Review**  
Carry over from original proposal with provision for participation from North-South Environmental.

- Task 3.4      Development Services Committee / Council Presentation – Draft OPA**  
Carry over from original proposal with provision for attendance by North-South Environmental.
- Task 3.5      Public Meeting**  
Carry over from original proposal with provision for attendance by North-South Environmental.
- Task 3.6      Preparation of Draft Final OPA and Monitoring Program Documents**  
Carry over from original proposal with provision for participation by North-South Environmental.

In addition to the core tasks in the work program, the original work program including one Optional Task, Task 1.7O – Aerial Reconnaissance. With the inclusion of the delineation of Small Streams features as a task within the work program, this optional task is recommended to assist in more accurately identifying Small Streams features located within the interior areas of private land holdings. We now proposed that this task be completed utilizing a helicopter instead of a fixed wing aircraft as proposed in the original work program. A cost for this optional task will be verified once the client team indicates a willingness to proceed.

The work program also contains allowances for the following:

- Advisory Panel – As a component of the original proposal, an allowance was set aside to allow for the assembly of a panel of experts who will be relied upon to address specific technical issues on an as needed basis.
- Agricultural Consultant – The retention of an agricultural consultant was not included in the original proposal the services of an agricultural consultant will be required to provide direction related conformity with the agricultural classification within the Greenbelt Act and Plan. The agricultural consultant will also provide input to guide the formulation of policies for inclusion in the OPA.

## **FEE ESTIMATE**

The following provides an updated estimate of the fees required to complete this assessment. Please note that the per diem rates for each member of the consultant team have been updated to reflect current rates. For comparative purposes, the hours allocated to each task in the fee matrix from the original proposal that have not yet been expended are shown in brackets beside the updated hour allocation which addresses the amended work program.



Project Team		Schollen & Company Inc.						N/S Environmental	
		M. Schollen	C. Li	H. Volhard	J. Kidd	Plan Part	Meridian	M. Sharp	S. Pielt
Project Manager/Architect		Project Manager	Landscape Technician	Office Administrator	Public Consultation	Policy	Policy	Natural Heritage	Natural Heritage
Per Diem Rate (based on 7.5 hour day)		\$1,170.00	\$570.00	\$450.00	\$999.98	\$1,050.00	\$1,050.00	\$825.00	\$375.00
Hourly Rate		\$156.00	\$76.00	\$60.00	\$133.33	\$140.00	\$140.00		

### Phase 2 – Confirmation of a Consolidated Approach to National Heritage Features Policies and Monitoring Protocols

2.1	Preparation of Draft Policies	5.0 (2.5)							
2.1A	Exploration of Policy Approach	5.0 (2.5)							
2.1B	Work Session with Town Staff	2.5							
2.1C	Generation of Draft Policy Document	2.5 (1.0)							
2.2	Preparation of Draft Monitoring Protocol	5.0 (4.0)							
2.3	Client Review Session	2.0							
2.4	Finalization of Policy Document	1.5							
Subtotal hours		23.5							
Subtotal fees by individual		\$ 3,666.00							
Subtotal fees by firm									

### Phase 3 – Draft Official Plan Amendment and Public Consultation

3.1	Preparation of Draft Official Plan Amendment	1.0							
3.2	Preparation of Final Monitoring Protocol	4.5 (2.5)							
3.3	Client / EPRTAC Review	2.5							
3.4	Development Services Committee / Council Presentation – Draft OPA	3.0							
3.5	Public Meeting	5.0							
3.6	Preparation of Final OPA and Monitoring Program Documents	4.0 (1.0)							
Subtotal hours		20.0							
Subtotal fees by individual		\$ 3,120.00							
Subtotal fees by firm									

Subtotal fees by phase		Phase 1	\$ 54,482.00
		Phase 2	\$ 22,371.00
		Phase 3	\$ 17,145.00
Subtotal fees			\$ 93,998.00
Expert Panel Allocation			\$ 5,000.00
Agricultural Consultant Allowance			\$ 5,000.00
Subtotal			\$ 98,998.00
Estimated Disbursements			\$ 5,000.00
Subtotal			\$ 103,998.00
GST			\$ 6,239.88
Total Fees			\$ 110,237.88

( )  
 Hours carried over from original proposal  
 Hours in original proposal  
 Updated number of hours are indicated in red



Project Team	Schollen & Company Inc.						Plan Part	Meridian	N/S Environmental	M. Sharp	N/S Environmental	S. Piatt
	M. Schollen	M. Hillar	C. Li	H. Vohard	J. Kidd	R. Palmer						
Project Manager/Architect		Project Manager	Landscape Technician	Office Administrator	Public Consultation	Policy						
	\$1,170.00	\$720.00	\$570.00	\$450.00	\$999.98	\$1,050.00				\$825.00		\$375.00
	\$156.00	\$96.00	\$76.00	\$60.00	\$133.33	\$140.00				\$110.00		\$27.00

Per Diem Rate (based on 7.5 hour day)  
Hourly Rate

#### Phase 2 – Confirmation of a Consolidated Approach to National Heritage Features Policies and Monitoring Protocols

2.1	Preparation of Draft Policies	5.0 (2.5)										
2.1A	Exploration of Policy Approach	5.0 (2.5)					20.0 (7.5)	20.0 (5.0)	7.5			
2.1B	Work Session with Town Staff	2.5					10.0 (4.0)	10.0 (5.0)	2.0			
2.1C	Generation of Draft Policy Document	2.5 (1.0)					3.0 (5.0)	3.0	5.0			
2.2	Preparation of Draft Monitoring Protocol	5.0 (4.0)					6.0 (7.5)	6.0 (7.5)	3.0			
2.3	Client Review Session	2.0					2.0 (4.0)	2.0 (4.0)	5.0			
2.4	Finalization of Policy Document	1.5					3.0 (4.0)	3.0				
	<b>Subtotal hours</b>	23.5	0.0	0.0			8.0 (2.0)	8.0 (2.0)	3.0			
	<b>Subtotal fees by individual</b>	\$ 3,666.00	\$ -	\$ -	\$ 300.00	\$ -	\$ 7,800.00	\$ 7,800.00	\$ 25.5			
	<b>Subtotal fees by firm</b>				\$3,966.00		\$ 7,800.00	\$ 7,800.00		\$2,805.00		

#### Phase 3 – Draft Official Plan Amendment and Public Consultation

3.1	Preparation of Draft Official Plan Amendment	1.0										
3.2	Preparation of Final Monitoring Protocol	4.5 (2.5)										
3.3	Client / EPRTAC Review	2.5							2.0			
3.4	Development Services Committee / Council Presentation – Draft OPA	3.0							2.5			
3.5	Public Meeting	5.0							3.0			
3.6	Preparation of Final OPA and Monitoring Program Documents	4.0 (1.0)							10.0			
	<b>Subtotal hours</b>	20.0	5.0	22.5	14.5		15.5	24.0	24.0			
	<b>Subtotal fees by individual</b>	\$ 3,120.00	\$ 480.00	\$ 1,710.00	\$ 870.00	\$ -	\$ 2,170.00	\$ 3,600.00	\$ 3,600.00	\$ 1,595.00		
	<b>Subtotal fees by firm</b>			\$6,180.00			\$ 2,170.00	\$ 3,600.00	\$ 3,600.00	\$1,595.00		

Subtotal fees by phase	Phase 1	\$ 54,482.00
	Phase 2	\$ 22,371.00
	Phase 3	\$ 17,145.00
<b>Subtotal fees</b>		\$ 93,998.00
Expert Panel Allocation		\$ 5,000.00
Agricultural Consultant Allowance		\$ 5,000.00
<b>Subtotal</b>		\$ 98,998.00
Estimated Disbursements		\$ 5,000.00
<b>Subtotal</b>		\$ 103,998.00
GST		\$ 6,239.88
<b>Total Fees</b>		\$ 110,237.88

( )  
Hours carried over from original proposal  
Hours in original proposal  
Updated number of hours are indicated in red

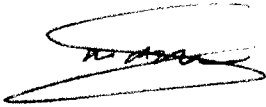
**Fee Summary:**

Total – Budget remaining from original contract	\$43,290.99
Total – Fee estimate for amended contract	\$110,237.88
Additional budget required	\$66,946.89

Thank you for the opportunity to submit the proposed for your consideration. Should you require additional information or have any questions, please do not hesitate to contact the undersigned. We look forward to continuing to work with you on this important assignment.

Yours truly,

**SCHOLLEN & Company Inc.**



Mark Schollen, BLA, OALA, CSLA  
Principal