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REQUEST FOR PROPOSAL

Social Enterprise Catalyst Housing: *Concept Research & Report*

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Introduction

Explorers' Edge (RTO12) is the regional tourism organization for Algonquin Park, the Almaguin Highlands, Loring-Restoule, Muskoka, Parry Sound and South Algonquin funded by the Ontario Ministry of Heritage, Sport, Tourism and Culture Industries. With some of Canada's most iconic natural landscapes within its borders, including those that inspired the Group of Seven painters, and in a region recognized as one of the most popular travel destinations in the province, RTO12 is proud to promote travel to the great Canadian wilderness just north of Toronto in all four spectacular seasons.

RTO12 is a not-for-profit agency that is governed by a volunteer Board of Directors. The mandate for RTO12 includes: providing industry leadership and strategic planning; developing strong, collaborative partnerships and packages; marketing; and developing workforce and skills training.

RTO12 (www.rto12.ca) is the administrative name for the region that is known in the consumer marketplace as Explorers' Edge (www.explorersedge.ca).

For more information on Ontario's Regional Tourism Organizations, visit <http://www.mtc.gov.on.ca/en/regions/regions.shtml>.

The RFP Process

1. The RFP will be posted online and potential bidders will be e-mailed a copy of the RFP.
2. Upon receiving the document and reading its content, potential bidders are requested to send an email to james@explorersedge.ca to acknowledge their intent to provide information about their proposal. This step will guarantee that the bidder name is entered in the bidder list.
3. The bidders prepare their formal response and send their document in an electronic format to Explorers' Edge by the specified RFP close date.

Project Timetable

Request for Proposal Issued: **February 17, 2020**

RFP Due: **March 10, 2020**

Proposal Submission Guidelines

Restrictions on Communications with Staff

If you wish to seek clarification on any of the information presented here, please contact James Murphy, Executive Director, by email at james@explorersedge.ca until the due date.

Information Submission Format

All responses to the questions in this document must be submitted in a Microsoft Word compatible format.

Submit Information to:

BY MAIL:

Explorers' Edge
3-1 Taylor Road Bracebridge, ON
Bracebridge, Ontario P1L 1S6
Attention: James Murphy, Executive Director

BY EMAIL:

Send to james@explorersedge.ca

Number of Copies Required / Format of Copies

- 1 - Word document

Confidentiality

During the RFP process, the bidder may obtain confidential information in regards to Explorers' Edge businesses and / or its members and employees. The Bidder agrees to keep such information strictly confidential at all times. The bidder may disclose confidential information only when necessary for the submission of a response to the RFP. This does not apply to information known and available to the public.

The Bidder acknowledges that Explorers' Edge will receive many responses to the RFP that might contain information considered confidential by the bidder. The bidder will allow Explorers' Edge to use such information for the purpose of the RFP process.

All information and the responses provided to Explorers' Edge about the RFP will become property of Explorers' Edge and will not be returned to the Bidder.

Executive Summary:

A New Housing Model to Serve the Regional Tourism Industry

In an effort to create a steady influx of industry workers to our region, RTO12 seeks to overcome one of the biggest obstacles for acquiring entry-level employees in particular: the lack of affordable housing.

To that end, we are proposing the creation of a new model for regional housing, which will be referred to in the development stages as “social enterprise catalyst housing,” and which will specifically serve the needs of the tourism industry in the RTO12 catchment. (Please note that RTO12 recognizes that other regional industries may benefit from the proposed model, such as healthcare and building trades; this can be further investigated by the chosen consultant(s).)

This new model will feature community and industry-funded, short-term housing development that will attract workers by: 1) providing sub-market rental rates for affordability 2) providing personal and professional growth opportunities for tenants by way of additional career, life skills and financial literacy training. A condition of occupancy in the short-term catalyst housing is that, in return for the aforementioned benefits, tenants will work in our regional tourism industry over a (proposed) two-year commitment (which will also be the duration of occupancy). The catalyst housing will thereby create an ongoing “funnel” to attract workers to our region.

It is the intention of this housing model that, upon completion of a (proposed) two-year residency, tenants will be in a better position to advance in their tourism careers (either here or elsewhere in Ontario), and will also be in a better position to move onto ‘the housing continuum’ (either here or elsewhere in Ontario).

RTO12 proposes that this catalyst housing development (either new builds or renovated buildings) will be funded by social enterprise investors, who will invest in community bonds to fund the building projects, thereby not relying solely or primarily on government sources of funding. Revenue sources from the housing model (in addition to rent) need to be determined in order to ensure returns on investment (e.g. a regional training and innovation centre space) for bond investors.

RTO12 seeks a consultant to conduct extensive and various research initiatives into disparate areas pertaining to this innovative new housing model, including but not limited to the following:

- Current and forecasted workforce demands across the region
- Affordable rental rates pertinent to entry-level wages in the tourism industry
- Community Bond Programs (including successful examples, administration of the bonds and returns, best practices, etc.)
- Social enterprise best practices and hub/incubator examples that might apply to the housing model
- Affordable housing models and management approaches
- Training and education opportunities and approaches for ongoing, work-integrated learning

- Municipal, provincial and federal regulations and stipulations pertaining to community housing projects
- Articulation of possible occupancy candidates, such as youth, marginalized workers, immigrants or Indigenous youth stakeholders
- Articulation of a potential application process for occupancy
- Articulation of how tourism business owners can participate in the career and life skills development of tenants, and how they (owners) can commit to supporting the housing and its tenants
- Identification of potential partners for this model, as well as potential government funding sources (e.g. housing, immigration, heritage buildings, etc.)
- Construction options (e.g. new build or renovate a heritage building, etc.) and regulations; suggested associated costs to build or renovate

For the purposes of this RFP, please consider the total budget to be \$70K CDN* when creating your submission.

**subject to possible revision*

The Opportunity:

The Consultant will conduct extensive desk research pertinent to the disparate areas listed above. It is anticipated that additional surveys of various potential stakeholders and partners will also be identified, developed and deployed by the Consultant.

A final report of all research findings will be compiled for submission at the conclusion of this project. It will include recommendations for moving forward, and a road map for next steps.

The work described in this RFP is to be completed by October 30, 2020.

Statement of Work:

This project will be executed in Four Phases:

Phase One: Significant consultation with RTO12 / Explorers' Edge staff to ensure objectives and executional approach are understood and agreed to by both parties.

Phase Two: Extensive desk research and environmental scans. Development of any stakeholder surveys.

Phase Three: Stakeholder surveys deployed.

Phase Four: Final Report - a summary of the overall project findings, and recommendations for next steps (i.e. a road map for moving the project forward).

Summary of Primary Deliverables

Phase 1 Memo Outlining Agreed to Project Approach and Ultimate Deliverables: MS Word and PDF electronic versions of the report in English

Phase 2 Report Required and Survey Questions Provided: MSWord and PDF electronic versions of the report and survey questions in English.

Phase 3 Report Required: Survey Monkey versions of the surveys created, executional approach and target audience articulated, surveys deployed, and results tabulated and reported

Phase 4 Final Report: MSWord and PDF electronic versions of the report in English of overall findings and recommendations for next steps

***Required:** All reports must be provided in print, in English as well as one PDF and one Word version. In addition, electronic versions of supporting documents will be provided when available.*

COSTING:

The proposal, at a minimum, will break out the costs across the following:

- Preliminary consultation with RTO12 staff and articulation of project understanding
- Development of project timelines (workback schedule) and deliverables
- Desktop Research approach, execution and report
- Survey development and outreach approach, execution and report
- Additional anticipated costs

Your proposal will form an integral part of the contract and will be considered the Scope of Work for the Initial Term, so please be thorough.

Corporate Information:

- Please provide a synopsis of your qualifications, including a detailed summary of previous successfully implemented projects of this nature
- Please include your approach to working with Clients
- Please provide a detailed description of your organization, including location(s), business operations, financial security, corporate history, principals and previous work for similar clients
- A standard contract proposal

Note: Proponents shall identify, within their submission, all excluded items.

Assumptions: The entire project will be fully completed no later than **October 30, 2020**

Selection Process

Below are aspects of your proposal that will be used to evaluate it, and you may also be asked to present and elaborate on these items to RTO12 staff. Proponents considered for this project must be able to demonstrate the following credentials/expertise:

1. Demonstrated understanding of the provincial regional tourism organization model and RTO12 in particular; knowledge of the RTO's 5-Year Strategy and Workforce Development pillar
2. Demonstrated experience of key personnel in a project of similar scope and nature
3. Demonstrated understanding of research best practices
4. Demonstrated understanding of workforce development challenges in the tourism industry
5. Demonstrated understanding of affordable housing challenges in the tourism industry
6. Demonstrated strong corporate history and presence, financial standing, and capacity to perform
7. Demonstrated experience in project management in order to meet deadlines with optimal efficiency and efficacy
8. Cost competitiveness
9. References (minimum of three)

Evaluation Criteria

A total of 100 points will be allocated to each proposal, as follows:

Category	Available Points
Technical	
Qualifications and Experience of Company	10
Qualifications and Relevant Experience of Project Team	10
Understanding of RTO12 Business Objectives Overall And For The Project	20
Quality of Implementation Approach & Ability to Meet RTO12 Objectives	20
Proposed Work Plan and Schedule	20
Sub Total	80
Financial	
Fees and Disbursements (including sub-consultants)	20
Total	100

Financial points will only be awarded to submissions that have achieved a minimum score of 60 out of 80 points on the technical evaluation criteria. Proposals that do not meet this minimum score will be deemed non-compliant and will be given no further consideration.

Bidder Certification

(Bidder must sign and return.)

I certify that this information is complete and correct to the best of my understanding and that I am authorized to submit this information on behalf of the company.

Authorized

Signature_____Date_____

Title_____

Print/Type

Name_____

Print/Type Company Name

Here_____ 10

Proposal Preparation and Format

The Bidder must ensure that the proposal meets the following mandatory requirements.

- An intent to Bid email is received by email before the “Closing Date and Time” as outlined in the RFP Timelines
- A complete bid is received by email “before the “Closing Date and Time” as outlined in RFP Process and Timeline
- Includes a cover letter including Bidder’s name, address, telephone, e-mail address and primary contact person with a note of date and time of submission. The letter should be submitted by a person authorized to sign on behalf of and to bid the Bidder to its Proposal and the terms of the RFP.
- Includes a statement that the Project Conditions outlined in the RFP have been reviewed and understood.

Pricing

Bidders must provide a detailed/line-itemed breakdown and summary of costs to provide the proposed services with total price shown. Prices must be quoted in Canadian dollars, including freight and delivery charges, and taxes.

Notes: Be advised that taxes are considered within the project budget. Prices must remain valid for at least 120 days. Bidders are required to provide their payment terms as part of their proposal.

Bidder Qualifications and References

Bidders shall provide the following information:

- Company profile outlining history, capabilities, qualifications, and experience as well as other information you deem relevant
- Summary of prior experience (within last 3 years) in providing the goods or services similar to those described in this RFP.
- Identification of all key personnel, including sub-contractors, who will be assigned to this project. Please include their relevant experience and qualifications and their roles and responsibilities in the project, as well as their level of efforts
- References including names, position, telephone numbers and e-mail addresses for which the Bidder has performed similar work. These references might be contacted during the proposal evaluation phase to determine their satisfaction with the work carried out.

Cost of Proposal Submissions

- The Bidder is responsible for all and any costs associated with the preparation and submission of the Proposal. Explorers’ Edge will not be liable to pay any such costs or reimburse the Bidders in the event Explorers’ Edge decides to reject all Proposals.

Information Indicative Only

- The information that is provided in this RFP is indicative only. Through the review of the proposals and subsequent finalization of an agreement with the successful Bidder Explorers' Edge reserves the right to request further information or clarification of information. Explorers' Edge reserves the right to request new or additional information regarding a Bidder and any individuals or other persons associated with a response.

Confidentiality

- If the Bidder does not want the documents that are submitted in response to this RFP to be made available to the public, the Bidder must indicate that the documents are submitted in confidence. The documents contain trade secrets, technical, commercial, financial or labor relations information that disclosure of the documents could reasonably be expected to result in harm, as specified in Section 10 of the Municipal Freedom of Information and Privacy Protection Act. While Explorers' Edge will endeavor to maintain the confidentiality of all such information, the Bidder must realize that such information may well become public or be disclosed.

Other Considerations

- Explorers' Edge in its sole and absolute discretion, may discuss or negotiate with any Bidder, the terms and conditions of its response without any obligation to other Bidders and without giving rise to any rights of other Bidders to amend or negotiate their response.
- Explorers' Edge shall not have any obligation to notify any of the Bidders of discussions or negotiations with any other Bidder, to invite amended responses from any other Bidders, to disseminate other information disclosed to any one Bidder, or to approve a further submission made as a result of such information.
- Conflict of Interest.
 - The bidder must declare any actual or potential conflict of interest including situations or circumstances that could give a bidder an unfair advantage during a procurement process or compromise their ability to perform
 - Explorers' Edge reserves the right to disqualify a vendor's quote due to a conflict of interest
 - The bidder must avoid and disclose any actual or potential conflict of interest during the performance of their contractual obligations
 - Explorers' Edge reserves the right to terminate an agreement where a vendor fails to disclose an actual or potential conflict or where such a conflict cannot be resolved.
- In the event of any discrepancies appearing, or differences of opinion, misunderstanding or dispute arising between the Bidder and Explorers' Edge respecting the intent or meaning of this RFP, or accompanying documents, or as to any omission there from or misstatements therein, the decision and interpretation of Explorers' Edge shall be final and binding upon all parties. There shall be no review or appeal of such decision.

End of RFP. Thank you for your time.