



**TORONTO ASSOCIATION OF
BUSINESS IMPROVEMENT AREAS
(TABIA)**

**Request for Proposals
Integrated Strategic-Operational Plan**

Deadline: November 01, 2019

TORONTO ASSOCIATION OF BIAS (TABIA)

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Organization Background

The Toronto Association of Business Improvement Areas (TABIA) is a non-profit umbrella organization working with the 83 Business Improvement Areas within the City of Toronto, who in turn represent more than 40,000 business and property owners.

The success of the world's first BIA, Bloor West Village, inspired other retail districts to follow this model and become BIAs themselves; such as, Bloor-Yorkville, The Kingsway, etc. Today, there are 82 BIAs in the City of Toronto, and over 300 across the Province of Ontario. The BIA concept has been emulated throughout Canada, the United States and across the globe.

As the number of BIAs in Toronto continued to grow, it became apparent that a formalized organization was required to provide an ongoing means of collecting and exchanging essential information and, importantly, addressing issues and concerns.

In 1980, a constitution was drawn up and a formal association was established, namely, the Toronto Association of Business Improvement Areas. TABIA has developed into a well-respected organization, recognized by all levels of government and the commercial sector. TABIA's involvement goes well beyond the promotion of BIAs.

For more information, please visit www.toronto-bia.com

Project Scope

TABIA is seeking a Toronto-based vendor (consultant/firm) to facilitate an integrated strategic-operational planning process that will provide guidance on the future decision-making and continuous improvement of the organization. In close collaboration with the TABIA Board and in consultation with the TABIA membership, the successful proponent will create an integrated strategic-operational plan (ISOP) that will include:

- Clarifying TABIA's organizational vision, mission and core values:
 - * That will anchor TABIA in a sustainable framework to support its objectives and identified outcomes, and;
 - * That will flexibly allow for TABIA to remain current, responsive, and nimble to opportunities in the face of internal and external shifts and challenges.
- Identification of programs where TABIA can provide the most impact per dollar for its members.
- Develop an HR Model for effective representation of its member's interests and to best fulfill program needs.
- Lay out a strategic path and strategy for expansion of the organization and its program and advocacy work.
- Provide a succession plan to ease the eventual transition of the executive director and staff.

The plan will include long-term goals and short-term objectives that not only reflect the current social and economic landscape of evaluation regionally, nationally, and internationally, but also leverage internal organizational capacity and strengths, and anticipate the challenges **TABIA** will face in the future. The plan should also consider creative and sustainable strategies to help support organizational long-term goals and operations.

The vendor will be responsible for providing expert advice and facilitation throughout the project, while being responsive to TABIA Board identified priorities and the following key deliverables:

- Assist the organization in its next integrated planning cycle, and ultimately, in the development of a comprehensive and sustainable integrated strategic-operational plan (ISOP) to anchor and guide TABIA activities over the next five (5) years.
- Identify a critical path with relevant timeframes for the development of the integrated strategic-operational plan.
- Facilitate planning sessions to map out TABIA's future.
- Design an effective method for data gathering, synthesis, and presentation, including document review, online surveys, focus groups, and stakeholder meetings.
- Guide all stages of the integrated planning process, including meetings with TABIA Board, association members, staff, and key external stakeholders.
- Assist in a review of TABIA's vision, mission, goals and objectives.
- Conduct an analysis of TABIA's membership structure and associated membership levies.
- Conduct an analysis of TABIA's offerings/services
- Conduct an environmental scan, trends, context, including a review of strategic plans/offerings from similar associations (nationally and internationally) and stock-taking of assets, stakeholders and emerging opportunities (legislation, budget, leadership).
- Identify gaps between current industry needs, organizational resources, organizational facilities, and staffing and the identified vision, mission, goals and objectives generated through the process.
- Include a monitoring framework for reporting and evaluating progress against the integrated strategic-operational plan objectives.
- Align the organization's future operational objectives to support proposed vision, mission, goals and objectives, such as (but not limited to):
 - * board and member support;
 - * human resources (staffing, size, positions, skills);
 - * technical and/or capital resources to run the organization effectively;
 - * third-party consultant needs;
 - * Succession Planning for the eventual transition of the Executive Director & other staff.
- Communication Strategy & Target Audiences.
- The final plan must consider both strategic and tactical/operational elements and present an execution plan that includes objectives, recommended tactics, timing/timeframes, budgets, and key points for responsibility.
- Develop an associated presentation (strategic highlights) and in-depth document suitable for public review and stakeholder validation.

The consultant will report directly to the TABIA Strategic Plan Taskforce. The consultant can expect that TABIA will assist in the logistics related to planning for stakeholder meetings and TABIA will be available to provide meeting facilitation support.

Project Schedule

The following is a planned schedule. Depending upon the number of proposals, intended completion dates may change.

<i>Date</i>	<i>Deliverable</i>
Oct 01, 2019	Call for Request for Proposal (RFP)
Nov 01, 2019	RFPs due
Nov 04 – 08, 2019	Review of proposals
Nov 12, 2019	Successful candidate notified
Jan – Feb 2020	Stakeholder Meetings Held
April 2020	Draft of the strategic highlights presentation (for review and approval by members)
April 2020	Draft of strategic - operational plan
May 2020	Final integrated strategic – operational plan

Bidders Qualifications

It is expected that the successful firm will be based in Ontario, Canada and have:

- Demonstrable recent experience and understanding of the non-profit sector.
- Understanding of Business Improvement Areas.
- Extensive strategic and operational planning experience.
- Experience coordinating and facilitating planning processes that result in comprehensive and sustainable integrated strategic-operational frameworks.
- Business planning and financial analytics experience and background.
- Relevant academic / industry qualifications.

Proposal Quality

Proposals should highlight:

- Demonstrated knowledge of organizational effectiveness, continuous quality improvement, and efficiency in volunteer/ not for profit boards.
- Demonstrated experience in organizational development and enhanced performance.
- Relevant experience and success in strategic-operational planning facilitation, including the level of satisfaction of current and past clients.
- Adequacy of approach and methodology.
- Completeness of the proposal.

Submission Requirements

A covering letter should be provided with the proposal clearly stating an understanding of the service to be provided. The letter must include the names of all individuals who will be participating in the project on behalf of the consultant. The person signing the covering letter must be authorized to bind the consultancy.

At minimum, the proposal will include the following:

1. A detailed CV/Resume/profile illustrating expertise and experience, including:
 - Three to five examples of projects in similar size and scope.
 - Three client references with permission to contact.
2. A critical path with recommended tasks and associated timelines.
3. An outline of what resources are to be provided to TABIA.
4. Identify the Project Manager and other specific people who will be performing the work and their individual experience and qualifications.
5. A fee identifying the total cost of the work and price schedule breakdown. The total cost must include all services and reimbursable expenses. No extras or claims will be entertained unless the scope of work changes.

Proposals may include supplemental information that strengthens submissions.

Responses to this call for proposal submission should be addressed to TABIA and sent electronically in PDF format by November 01, 2019 to info@toronto-bia.com

Communication

Prospective bidders may approach Riley Lee, Executive Assistant, TABIA about this project. The questions should be submitted in writing via e-mail, no later than October 28, 2019 to: rlee@toronto-bia.com

The goal is to answer each question within two working days of its receipt. The answers to questions will be distributed to all bidders who have informed the Executive Assistant, TABIA of their intent to make submissions. Questions and Answers will also be posted via the website, www.toronto-bia.com under the RFP posting.

General Conditions

Conflict of Interest

Proponents must disclose to TABIA in their Proposal any potential conflict of interest, including any which may involve TABIA employees, membership or members / employees of agencies, boards, or commissions who may have a financial interest in the Proponent's firm. If such conflict of interest does exist TABIA may, at its discretion, refuse to consider the Proposal.

Right to Amend RFP

TABIA reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all proponents through the TABIA website.

Bidder Incurred Costs

All costs incurred in the preparation and presentation of proposals in any way whatsoever shall be wholly absorbed by the bidder(s).

Indemnity

The bidder(s) will indemnify and save harmless TABIA from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained, done or omitted by TABIA at any time before or following termination of the agreement.

Acceptance of Proposals

TABIA is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in light of the evaluation criteria specified above.

Evaluation & Selection of Proposals

At least three (3) members of the TABIA Board will evaluate all complete proposals, and may request to conduct in-person interviews with the top proponents. The right is reserved to make an award based directly on the proposals submitted or to negotiate further with one or more proponents.

By responding to this RFP, proponents will be deemed to have agreed that the decision of the Selection Committee will be final and binding. The selection of the proponent will be based on the cost as well as the following criteria: Proponent Profile, Experience and Qualifications of the Proponent, Proposed Staff Team and Resources, Creativity and Innovation and Work Plan and Deliverables.

Ownership

The proposal shall be the property of TABIA and shall not be published or released without the written consent of TABIA