

Request for Proposal

ONTARIO TRAILS COUNCIL

Strategic Business Plan 2017 for the Ontario Trails Council

1. Introduction

- 1.1** The Ontario Trails Council (OTC) is an independent, membership/volunteer driven, not-for-profit association incorporated in 1991. The changing nature and growing importance of trails places the OTC in a lead position, to **promote** the development, preservation, management and use of trails for recreation, tourism and transportation purposes. Over the years, OTC's sustainability has been impacted negatively, almost resulting in closure from several factors. These factors should be taken into account as potential new opportunities are examined towards establishing the OTC as a financially sustainable and relevant organization going forward. Information about the OTC can be found at ontariotrails.ca
- 1.2** The Ontario Trails Council has a volunteer board with one staff and provides information dissemination and coordination management via website, social media, position papers, sector consultation, education programs, public awareness, conference and seminar planning and management, grant writing, fund seeking and membership service management to 220+ organizations and members of the public looking for education on trails.
- 1.3** In 2005 the government of Ontario launched the Ontario Trails Strategy (OTS), in 2015 the government, working with trail stakeholders, developed and released the Trails Action Plan (TAP) and has been working on its implementation with stakeholders. Action Item 1.5 of the TAP, with the support of the OTC, calls for "a renewed strategic business plan for the OTC, in consultation with key stakeholders, to build its capacity to assist with the implementation of the TAP".
- 1.4** The OTC is seeking proposals from consulting firms or individuals with strategic planning experience, knowledge of the not-for-profit sector and sustainability best practices and an understanding of the Ontario trails context, to facilitate the two components of the study over a four phase process. The two components include:
- 1.4.1 OTC Strategic Business Plan (i.e. mission, vision, core values, priority strategic directions, goals and objectives), a long-term strategy; and
- 1.4.2 The OTC Action Plan, a shorter term operational plan that sets out actions, target dates and performance measures which are aligned with realistic budget forecasts.
- 1.5** The strategic consultation process will consolidate and rationalize the delivery of existing member services and introduce Ontario trails programs, services, and capabilities to OTC members and other opt-in trail sector stakeholders for direct feedback on roles, responsibilities of the OTC and declare overlaps/gaps in sector service and revenue-generating opportunities.



- 1.6** The strategic consultation process will involve face to face, phone and/or webinar consultation and survey to ensure documentation on feedback, which will serve as a baseline report to the OTC Board on the current functioning of the OTC, its stakeholder relations, its ability to coordinate and implement its programs and functions and potential new opportunities. This will be coordinated with the role of the OTC in the implementation of the TAP etc.



2. Overview of Project

Project Expectations

Every respondent will ensure that:

1. The consultant will work closely with the OTC Board and staff
2. Each proposal will incorporate a minimum of the following four phases and associated elements.

2.1 Phase One: Research and Information Gathering

The consultant will conduct research scans (e.g. on best practices in governance structure, sustainability measures, potential new revenue sources, member services etc.) and collect other relevant information (e.g. the Ontario Trails Strategy, *Ontario Trails Act, 2016* and Trails Action Plan) as appropriate, to assist in providing a fulsome analysis of factors that should influence the OTC Strategic Business Planning process.

2.2. Phase Two: Stakeholder Consultation

The successful proponent will ensure thorough sector consultation, as guided by the Ontario Trails Council.

2.2.1 Methodology to be confirmed in the proponent's response, should include surveys, stakeholder consultations, expert interviews with the OTC Board, its membership, staff and the trails sector as appropriate to determine key issues/priorities, current strengths/weaknesses, demands/trends, challenges/opportunities, priority strategic directions, goals, objectives and recommendations toward an effective Strategic Business Plan and Action Plan for the OTC.

2.2.2 The OTC Board and staff will be fully engaged during all phases.

2.2.3 Trail stakeholders will include those with land/water, motorized/non-motorized and on/off-road trail interests.

2.2.4 Key trail stakeholders that should be consulted include provincial trail organizations, key regional trail organizations, Regional Tourism Organizations, Conservation Authorities, municipal parks departments, academia and other interests as appropriate.

2.3 Phase Three: Analysis and Conclusions

The consultant will analyze the research, consultative inputs and other relevant information in formulating documented analyses and conclusions as the basis for report recommendations.

2.4 Phase Four: Recommendations and Draft and Final Reports

The draft and final reports will include a long term Strategic Business Plan and shorter term Action Plan.

2.4.1 The consultant will provide the draft report for review of and feedback by the OTC Board and staff during an in-person presentation and discussion.

2.4.2 The final report will be prepared and submitted to the OTC.



2.5 Project Budget: \$24,000

2.5.1 Payment will be made upon receipt of invoice. Invoices are to include all applicable HST. Proponent is responsible for all HST and other government remittances, unless otherwise stipulated in final contract. OTC suggests a 25%/50%/25% payment plan, aligned with the OTC's receipt of funding from the Ministry of Tourism, Culture and Sport for the project.

2.5.2 The OTC will cover the cost of stakeholder sessions (max. 6) including invitations, venues etc. The consultant will facilitate the sessions and provide all necessary materials.

2.5.3 Invoices are to include services rendered, HST, PST, BIN or other necessary identifying information such that OTC can pay the invoice.

2.5.4 Any additional site developer fees or license purchases are to be made out of the budget for the work related to this RFP, upon approval of the OTC.

2.6 Project Milestones and Timelines

2.6.1 RFP Submission by May 31, 2017

2.6.2 Target for Completion: March 31, 2018



3. Proposal Requirements

Submitted proposals must include the following:

- 3.1** An outline of the contracted services in sufficient detail to illustrate the proponent's understanding and ability to meet the project requirements, overall and by module.
- 3.2** Proposed work-plan including allotment of time for each phase and methodology proposed to carry out the contract duties.
- 3.3** Names, qualifications and experience of key personnel to be assigned to the project, along with specific project responsibilities, days allotted to the project and per diem rates.
- 3.4** References and product examples from other clients with similar projects.
- 3.5** Itemized costs including but not limited to design, implementation, expenses, distribution, and applicable taxes.
- 3.6** Proposed fees for additional work agreed necessary or desirable.
- 3.7** Any other information necessary to permit the creation of a services agreement for the required services.

- 3.8** Previous work in the outdoors or trail sector in Ontario an asset.

- 3.9** References for previous work leading to an organization attaining self-sufficiency by implementing your strategic recommendations is required.



4. Terms and Conditions for Proposal Submission

- 4.1 Prior to submitting proposals, proponents should carefully read this RFP in order to identify the OTC's requirements and conditions.
- 4.2 Three original copies of the complete proposal submission signed by an authorized company representative and sealed in an envelope identified as the "Ontario Trails Council Strategic Business Plan 2017".
- 4.3 Any proposals received after the closing time and date may not be accepted and may be returned to the proponent unopened.
- 4.4 Proposal submissions must be delivered by 4 pm May 31, 2017 to:
Ontario Trails Council P.O. Box 500, Deseronto, Ontario,
Canada, K0K1X0
- 4.5 Proposal submissions constitute a firm offer to supply the required products and services and if successful will be used as the base of a formal written agreement.
- 4.6 All prices, quotes and terms shall remain firm, binding and open for acceptance by the OTC for thirty (30) calendar days from and including the proposal closing date.
- 4.7 The lowest priced proposal may not necessarily be accepted by the OTC.
- 4.8 Proposals, which do not adhere to the rules, schedules, instructions or requirements detailed herein, may be disqualified at the discretion of the OTC.
- 4.9 Prior to the closing date for this RFP, the OTC may, by written notice, alter, delete or add to any of the terms or conditions of this RFP or prior to making any award on this RFP, the OTC may, by written notice cancel in whole or in part this RFP.
- 4.10 Without prejudice to the OTC's right to reject proposals for non-compliance, the OTC reserves the right to request clarification in writing where the proponent's intent is unclear.
- 4.11 Award of this contract is conditional upon the OTC and the successful proponent entering an agreement satisfactory to the OTC. If no agreement can be reached, the OTC reserves the right to disqualify the recommended proponent and award this contract to another proponent or to cancel this RFP.
- 4.12 The proponent understands and agrees that the OTC shall not reimburse any proponent for any costs or expenses incurred in the preparation or submission of a proposal in response to this RFP, nor in any presentation or other activity related thereto; it being understood and agreed that all such costs and expenses will be borne solely and exclusively by the proponent.
- 4.13 The OTC reserves the right to distribute any proponent's questions concerning this RFP and the OTC's response thereto to all other proponents.
- 4.14 All materials including but not limited to, electronic media representations, documents, raw data, process technology, programs, and inventions conceived or produced in the performance of this proposed agreement shall belong to the Ontario Trails Council. The intellectual property (including copyrights, patents, trademarks, industrial designs, know-how, and trade secrets) shall also belong to the OTC on completion or termination of the services.



4.15 Electronic submission accepted.

4.16 Any inquiries concerning this RFP are to be directed to:
Patrick Connor BAH, CAE, SSA; CEO
Phone: 613 396-3226 Cell: 613 484-1140 E-mail: execdir@ontariotrails.ca

4.17 Proponents are requested to confirm their intent to submit a proposal by notifying the contact identified in 4.4 on or before May 14th, 2017

