



Request for Proposals
Organizational Strategic Review
Ontario East Economic Development Commission

1. ORGANIZATION OVERVIEW

The Ontario East Economic Development Commission (OEEDC) is the lead regional economic development organization facilitating collaboration, working with investors, supporting members, providing resources and working as a collective voice for economic development in Eastern Ontario.

OEEDC represents more than 200 communities, thousands of businesses and nearly two million residents. Ontario East members include more than 125 economic development professionals and business leaders working co-operatively to promote Eastern Ontario as a premiere business location. ([More information on our communities.](#))



2. PROJECT SCOPE

OEEDC is seeking to restructure the organization with the intent to better serve the membership and align with current economic development trends. The organization has been funded by a membership model that includes the basic membership and sector memberships for several decades. It is recognized that the effectiveness and return on investment for the sector memberships has been decreasing over the past few years.

The consultant will consult with staff, board and stakeholders to develop an organizational strategic plan to provide direction for the OEEDC and its partners to effectively implement the recommendations of the organizational strategic review and meet OEEDC's objectives to better serve members.

Ontario East is seeking to hire a consultant to complete the following activities:

Membership Structure

- Review the current membership structure along with two (2) alternative models and make recommendations on a membership model that results in the following:
 - Addresses the membership needs as identified in the survey (provided).
 - The return on investment can be tracked and monitored.
 - The model facilitates a similar revenue amount, with opportunity for growth, as collected through the sector teams on an annual basis.
 - That allows for advance planning for the members and the organization.
- The recommended membership model needs to have an operational plan, suggested key performance indicators and financial projections.
- Make recommendations regarding surplus/deficit of sector team memberships.

Governance

- Review the constitution & bylaws and prepare appropriate motions to facilitate the recommended membership model.
- Identify organization priorities based on member survey (May 2019), facilitated board strategy session (May 2019), and stakeholder engagement.

Communication

- Messaging to stakeholders on organizational changes
- Create content for announcement at OEMC, 11 September

Bid and Contract Schedule

RFP release:	24 July 2019
Proposal submission deadline:	7 August 2019
Consultant selection:	12 August 2019
Project initiation:	15 August 2019
Interim progress – business model:	5 September 2019
Interim progress – bylaws/constitution:	16 September 2019
Interim progress – communication plan:	27 September 2019
Final submission and presentation:	10 October 2019

Supporting Documents to be Provided

- Member Survey (May 2019)
- Strategic Plan (March 2017)
- Financial Statements 2018/2018, 2018/2019
- Constitution/Bylaws
- Summary from facilitated board session (May 2019)

Project Manager

This project will be completed under the direction of Dylan Boles, Executive Director of OEEDC, the project manager.

3. PROPOSAL SUBMISSION

Proposed Project Budget and Schedule

Consultants must clearly indicate the separate cost for the three portions of the project scope – Membership Structure, Governance and Communication, with related taxes stated separately. The maximum budget for the organizational strategic review will not exceed \$30,000 CAD including expenses and excluding taxes. In addition to outlining the assessment approach to be used, the proposal should include a proposed payment schedule, cost breakdown by item or activities that are required to complete the project, and the billing rates and hours for key personnel involved in the assignment.

Submission Process

One electronic copy to be sent to dylan@ontarioeast.ca and one hard copy delivered to:

Attention: Dylan Boles
Executive Director
Ontario East Economic Development Commission
945 Princess Street, Box 209
Kingston, Ontario
K7L 0E9

Proposals must be received no later than 4:00 pm on 7 August 2019.

Proposal Content

Proponents should address the following in their submission:

- General qualifications on similar studies by respondent, including a sample product
- Staffing plan, including brief career descriptions for senior project participants, and availability of same
- Reiteration of the proponent's understanding of the project objectives and scope of requirements
- Identification of any clarifications and assumptions upon which the proposal is based, regarding scope, deliverables, and activities
- Execution plan for the project, including detailed listing of activities, milestone schedule, meetings and deliverables for each of the major study areas
- Cost of services estimate, including corresponding fees and disbursements associated with the work and HST

Provide complete company information:

- Organization name, mailing address, telephone, fax, website
- Type of organization (i.e. include a brief description of the services your company offers)
- Key contact person and contact information
- Years in business
- Number of full-time employees, size of entire team
- Any other information relevant to this project
- Provide three client references for work completed within the last five years

Provide a summary of the project team including:

- Size of team, brief bios of each person and the role they would assume on this project
- A summary of your approach to project management and client engagement
- Hours, daily and/or per project rate for the services to be rendered

Project work plan:

- A work or project plan for the project including key tasks, dates, key responsibilities and timetable. Include any/all relevant information regarding your approach
- A description of the general approach or method for completing the project displaying an understanding of the project, project task, and project deliverables.
- Describe the methodology used in determining the project options

Pricing:

- Describe your proposed pricing, including any and all fees and expenses
- Quote your fees exclusive of HST, the total HST payable, and total of fees including HST

4. EVALUATION OF RESPONSES

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Quality of work plan – comprehensiveness, effectiveness and technical approach to overall project
- Cost and value
- Demonstrated ability to complete the work on an efficient schedule
- Quality, expertise and accessibility of personnel
- Knowledge, experience and understanding of economic development
- Recommendations from prior clients (including list of references) for whom the consultant has performed similar projects

Award or Rejection of Bid

Any award made is subject to a signed contract. If a contract between the contractor and the OEEDC cannot be negotiated in a timely fashion to OEEDC's satisfaction, the award may be withdrawn.

This RFP may be cancelled or re-tendered at any time. The lowest or any submission will not necessarily be accepted. OEEDC is not obligated to award a contract arising from the RFP.