

REQUEST FOR PROPOSAL

Strategic Planning Consulting Services

Introduction

The UpTown Waterloo Business Improvement Area (BIA) is seeking proposals from qualified consultants to assist in refreshing its strategic plan that will guide its direction over the next five years. It is critical that this process be completed by October 31, 2018 to allow for operational plans to be developed for the 2019 planning cycle.

The successful consultant must have recent experience and understanding of the non-profit sector specifically around the organization, physical improvement and economic development of core city centres. The successful consultant will also coordinate and facilitate the planning process, facilitate internal and external stakeholder interviews and create an updated strategic planning document that is measurable and suitable for public review and presentations.

Schedule of Events

The following schedule is provided for planning purposes only. The UpTown Waterloo BIA may alter this schedule at any time and accepts no responsibility for adherence to this schedule:

1. Issue Request for Proposal June 29, 2018
2. Deadline to Receive Proposals July 27, 2018
3. Presentation to Selection Committee August 3, 2018
4. Awarding of Proposal August 10, 2018

Organization Background

Formed in 1972, the UpTown Waterloo Business Improvement Area (BIA) is a committee of the City of Waterloo's Council responsible for the organization, physical improvement and economic development of the UpTown business area. As an independent, non-profit organization, we are led by a volunteer Board of Directors comprised of business and property owners, persons voted in by rate-paying member(s) and member(s) of Waterloo Council. For more details visit <https://uptownwaterloobia.com>

Scope of Services

The successful consultant will be responsible for providing expert advice and facilitation throughout the project and the following deliverables:

1. Develop a critical path identifying key tasks and timeframes for completion by August 31, 2018.
2. Project coordination including regular meeting with the UpTown Waterloo BIA Board of Directors and Executive Director and providing status reports to keep the project on schedule.
3. Collect stakeholder input including the gathering of key assessments and recommendations.
4. Complete a needs assessment and environmental scan including reviewing existing relevant plans and documents identifying patterns that are applicable, analyzing strengths, weaknesses, threats and opportunities.
5. Facilitate meeting with thought-provoking questions and assist discussion and decision making ensuring that conversations are productive and innovative and oriented towards creating a shared future and vision for the UpTown Waterloo BIA.
6. Develop a comprehensive refresh of the BIA's Strategic Planning document that is suitable for public review and presentations.

Proposal 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 the UpTown Waterloo BIA.
4. The fee quote for services should include a detailed budget with a breakdown of expected hours and other projected costs.

Proposals may include supplemental information that strengthens submissions.

Resources

Consultants may wish to review the UpTown Waterloo BIA's past strategic plan [HERE](#).

Selection process

The proposals will be reviewed by the selection committee and the successful candidate will be contacted by August 1, 2018.

Conflict of Interest

Each consultant (on behalf of an individual or team) shall declare in its response any real or perceived conflict of interest which either presently exists or can reasonably be foreseen in the future. A conflict of interest will be evaluated by the selection committee on its merits and will not necessarily result in the exclusion of a proposal.

Conditions

The UpTown Waterloo BIA will not be liable for any costs incurred by the consultants in the preparation of their response to this proposal. The UpTown Waterloo BIA reserves the right to ask for additional information and adjustments to any proposed response. The UpTown Waterloo BIA will keep all information provided by the candidate as confidential. Information provided to the consultant is to be used for the sole purpose of responding to this RFP.

Questions and Clarification

All interested parties will have the opportunity to ask questions and seek clarification by contacting the UpTown Waterloo BIA Executive Director Tracy Van Kalsbeek at 519-885-1921 or tracy.vankalsbeek@waterloo.ca.

How to Apply

Proposals should be emailed to the UpTown Waterloo BIA no later than 4pm on Friday, July 27, 2018.
Email: tracy.vankalsbeek@waterloo.ca