



## REQUEST FOR PROPOSAL

Invitation to tender for: Consultant – Community Transportation Business Model - Social Enterprise Growth

Issued by: Routes Connecting Communities Inc.

### Summary

This document contains the invitation to tender for a Consultant to assist Routes Connecting Communities with its strategically developed, social enterprise based, Community Transportation business model. The Consultant, who will be familiar with community transportation initiatives and the transportation industry in general, will perform a thorough review of the model and make recommendations around completing implementation and positioning for growth.

The successful bidder will work with Routes Connecting Communities management team, board members, service users, community partners, volunteers and employees to research and make recommendations around program growth and development.

Background information on Routes Connecting Communities, an outline of the project requirements and details of the tender process are attached.

### Deadline

The deadline for receipt of applications is October 24, 2016 by 4:00pm.

### Contact

For further information on this tender process, or details of the project more generally, please contact Cathy Wilkinson, Executive Director by email at [cathy@routesc.org](mailto:cathy@routesc.org)

## Section 1 – General Information

### 1.0 Background

Routes Connecting Communities Inc. is a non-profit, charitable organization founded in 1988. Routes is a grassroots, non-profit organization that's all about connecting people with the supports and services they need to improve their quality of life. Our team of volunteer drivers use their own vehicles to provide transportation to people who are restricted due to life circumstances such as financial hardship, health issues, and geographic, social or cultural isolation. Every year, Routes provides thousands of rides to people who are transportation challenged. Our services enable access to the basic necessities of life including food, medical care, employment, educational opportunities, social inclusion and much more. Routes is currently in a growth phase and is transforming from a transportation provider into a "transportation connector" that harnesses the transportation assets and resources of the entire community in order to expand transportation options.

## Section 2 – Scope of Work

### 2.0 General Purpose

This Tender is a search for a Consultant who will perform a full review of the social enterprise business model currently in existence. They will be responsible for advising and recommending on implementation of the model as well as positioning the organization for growth. The Consultant will be responsible for incorporating the recommendations into a Business Plan for the organization.



## 2.1 Activities

1. Meet with Executive Director and Board of Directors to finalize a detailed workplan for the project.
2. Create a schedule for the Consultant to work with the various stakeholders (as determined from the workplan) from whom input will be required.
3. Review the existing strategic plan and high level social enterprise business model with staff and board members.
4. Consult with other stakeholders as determined by the workplan and schedule.
5. Prepare a report outlining the results of the assessment of strategic initiatives and high level business model along with preliminary recommendations for implementation and growth.
6. Present the draft report to management and the Board of Directors for feedback.
7. Draft formal Business Plan based on feedback.

## 2.2 Timeframe

The target date for completion of the Business Plan is January 31, 2017. A precise timetable for deliverables will be discussed with the successful applicant.

## 2.3 Deliverables

The successful Consultant will be responsible for the following deliverables:

- One (1) Workplan for the project
- One (1) Report outlining assessment findings and preliminary recommendations
- One (1) Draft Business Plan due in January 2017

Routes Connecting Communities will be monitoring the quality and timeliness of the deliverables.

## 2.4 Budget

The total budget for Tender including HST is not to exceed \$ 18,000.00

## Section 3 – Selection of Applicant

### 3.0 Evaluation of Applicants

All applicants will be reviewed by Routes Connecting Communities. Routes is not obliged to accept the lowest, or any, tender.

### 3.1 Selection Criteria

The selection of the successful applicant will be based on core pricing as well as the following criteria:

#### A: Overall submission

- Letter of Introduction
- Understanding of Assignment
- Profile of Applicant(s)

#### B: Organization and Staff Experience and Abilities

- Experience and Qualifications
- Proposed Staff Team and References

#### C: Work Plan and Resources

- Work Plan and Deliverables

#### D: Total Fixed Price

- Total cost of project and daily rate of consultant



### **3.2 Tender Format**

All bids must be sent in as an electronic proposal:

### **3.3 Proposal Elements**

Proposals must speak to past performance, technical approach (how applicant(s) proposes to perform Scope of Work), project personnel and their availability, and price of proposed services. It is expected the sections below will be covered.

#### **Overall Submission**

Section 1 - Letter of Introduction

Section 2 - Executive Summary

#### **Organization and Staff Experiences and Abilities**

Section 3 – Applicant Profile (date formed, services offered)

- Experience and Qualifications of Applicant(s)
- List of key staff – indication of duties and availability with this project
- Attached resumes for each staff
- Experience with other similar projects
- Necessary skills, experience and expertise in delivering mentioned deliverables
- Provision of three (3) references for whom similar work has been performed

#### **Work Plan and Resources**

Section 4 – Work Plan and Deliverables

- Description of how applicant intends to achieve the goals and objectives
- Detailed work plan indicating project method, schedule (key dates), tasks (by whom) and deliverables (for each deliverable provide sufficient detail for the Selection Committee to evaluate the value of the effort expended)
- Deliverables/outcomes that will be achieved as part of the project
- Identification of significant challenges in completing project – proposed strategy for addressing them
- Estimated overall timeline of the project, indicating when applicant can commence work
- State assumptions regarding roles and involvement of Routes stakeholders and estimated amount of time involved

#### **Budget and Fees**

Section 5 –Budget and Fees

- Budget reflective of the activities and hours with HST included.
- The total price quoted must include all labour, other overhead, materials, equipment, licenses, analysis, travel, accommodations, communication, transportation and delivery costs (courier, long distance charges, and so on), staff time, disbursements and any/all other operational costs and fees associated with the services. Routes Connecting Communities shall not be responsible for any additional costs.
- Please include daily consulting rates for key personnel.



## Section 4 – Terms & Conditions

### 4.0 Project Management

Applicants should expect to work closely with Routes Connecting Communities staff and the Board of Directors.

### 4.1 Schedule of Events

Tender released for applicants October 7, 2016

Tender Deadline **October 24, 2016**

Applicants should make themselves available for potential selection interviews on **November 14/15, 2016**

Announcement of award on or before, **November 18, 2016**

Commencement of contract on or before, **November 30, 2016**

Conclusion of contract on or before, **January 31, 2016**

### 4.2 Financial Arrangements

An overall fixed-price cost for the Tender should be clearly detailed and specified, with a breakdown of the individual elements.

Payment for all goods and services supplied will be made on the submission of appropriate invoices. The payment schedule and invoicing arrangements will be agreed upon with the successful applicant following their selection. Payment can be made on submission of appropriate invoices for 3 stages of the project as follows:

1/3 upon contracts being signed

1/3 upon completion of report on assessment findings and preliminary recommendations

1/3 upon satisfactory completion and delivery of all deliverables

Routes Connecting Communities Inc. retains the right to withhold payment, where a tender has failed to meet his or her contractual obligations in relation to the delivery of goods/services to an acceptable level of quality.

### 4.3 Applicant's Acceptance of Tender Terms and Conditions

Each applicant, by submitting a proposal, signifies that the applicant has read, completely understands, and accepts the terms and conditions of this Tender in full.

### 4.4 Proposal Submission

Electronic submissions are accepted to:

**Cathy Wilkinson – Executive Director**

cathy@routesc.org

The deadline for bids is **October 24, 2016 by 4:00pm.**

Bids must be completed in accordance with the format specified. Incomplete tenders will be rejected.

Bids that are delivered late will not be considered