



Request for Proposal

Data Collection, Community Consultation and Strategic Planning for Muskoka Futures

YOU SHOULD RESPOND TO THIS IF:

- You're bored doing the same old, same old for every client.
- You've always wanted to try a **BOLD** idea but haven't had the right client yet.
- You're tired of working with people who say they want to change but never do.

In 2016 we reimagined and restructured our organization so we could set out to change the world...well, our little corner of it anyways. As a not for profit business development corporation we asked ourselves how could we amplify our impact? The answer was painfully obvious; be more approachable, offer better connections and share our knowledge more freely. Since then our client base has more than tripled, as has our Investment Fund. We launched our Momentum Program to support businesses with better advice, then in 2018 we had a big hairy audacious idea to help attract new industry and innovation to Muskoka and in 2019 Muskoka 4.0, our \$250,000 Investment Competition, was born.

Today we strive to invest more than \$2,000,000 per year in local businesses that can demonstrate impact in our communities. We are also embracing the opportunity to attract tech startups and newcomers to Muskoka by proving we are ready to welcome them, and support them and their families to make a life here.

While all things point to a brighter future, we need to consider if the path we are on is still what's best for Muskoka and make sure we aren't missing the next big thing, and that's where you come in. We need a team that will help us ask the hard questions so we can be sure we are on the right path. We need to confirm that our clients value us and identify where we can do better. We need good data to make good decisions and all of this needs to be done through a diversity and inclusion lens.

We've been pretty good about challenging ourselves to this point but now it's time to take things a step further. That said, we don't want the same old same old...we are looking for a firm who can approach the strategic planning process with bold creativity, who is not afraid to think outside the box and challenge the status quo. A team that understands that change can be uncomfortable and can help us navigate that with humor and grace. We need people who have creative ways to engage the community and our Board in the planning process, and know how to coax honesty out of people who tend to be all

too polite. We want the good, the bad and the ugly because without it we can't possibly make ourselves better.

Okay now on to the formal bits:

REQUEST FOR PROPOSAL

Issue Date: June 16, 2022

Muskoka Futures
16 Dominion St,
Bracebridge, ON P1L 2A5

Submission Contact Information:

David Brushey Executive Director

Phone: 705-646-9511

Email: david@muskokafutures.ca

This is a request for proposal (RFP) only. Muskoka Futures is not obligated nor is Muskoka Futures to be construed as obligated, to proceed further. Muskoka Futures may at its sole discretion elect not to accept any submission for any reason.

1. BACKGROUND:

Since 1988, Muskoka Futures has been supporting businesses through counseling and business investment activities. We deliver the Community Futures Program (CFP) in the District of Muskoka, funded by the Federal Government through FedNor.

What is the Community Futures Program?

The CFP is designed to enable rural communities with the tools they need to address their own development with autonomy. Community Futures organizations have four core deliverables of lending, business counseling, community economic development and community strategic planning. However, they have the autonomy to define how these services are delivered in their community.

It is our mandate to support, invest and grow the businesses of Muskoka. We do this under our brand - Approachable, Knowledgeable and Connected.

Some Muskoka Futures basic information:

Incorporated in 1988

Volunteer Board of Directors: usually 12 Directors but can range from 9 to 15

Core Staff (3): Executive Director, Administrator, Investment Manager

Project Staff (1): Momentum Program/Muskoka 4.0 Competition Manager

Operating Budget: \$1,500,000 over 5 years (\$300,000 annually on average). Our current Operating Agreement with FedNor ends December 31, 2024

Momentum Funding: \$647,500 over 3 years ending June 30, 2023

Investment Fund Net Asset: \$15,000,000

Annual Investment Target: \$2,000,000 + \$250,000 through Muskoka 4.0 Investment Competition

Maximum individual loan amount: \$300,000

Current # of loan Clients: 300

Average Annual # of clients that access Advisory Services: 160

2. SCOPE OF WORK:

Muskoka Futures is seeking proposals to retain professional services to support their Strategic Planning process looking ahead for the next 3 years.

Respondents must provide a proposal that indicates a description of the techniques, approaches and methods to be used to satisfy the following, remembering that we are looking to be bold and creative. At the same time we expect you will advise us on proven techniques that we need to consider.

Data Gathering and Community Consultation Phase

As this phase of data gathering and community consultation is planned and implemented we will look to you for your input and guidance on specific questions to ask and how to best gather data and feedback in a creative and engaging manner.

Data gathering from, and consultation with, existing clients

- What our clients think of us, do they value our services, do we make a difference?
- Are we living up to our brand - Approachable, Knowledgeable and Connected?
- What more do clients need?

Consultation with other business support organizations. This may include but is not limited to Economic Development Departments, Chambers of Commerce, Banks, etc.

- Are we living up to our brand?
- Do they see value in our programs/services?
- Are there gaps in support for businesses that Muskoka Futures should consider addressing?
- Are there economic development or investment approaches in other jurisdictions that we should consider?

Consultation with businesses we have not engaged with

- Are they familiar with us?
- Why have they not accessed our services?
- What needs do they have?

One-on-One interviews with each Board Member and Staff member.

Strategic Planning Phase

Following the data gathering and community consultation process, you will:

- Present data analysis and findings to the Muskoka Futures Board of Directors and Staff
- Provide input based on the data and findings regarding how we can better measure outcomes from our activities and how we report those outcomes to our community to further strengthen our brand and advance our organization.
- Facilitate a Strategic Planning process with the Muskoka Futures Board of Directors and Staff with the objective of identifying clear, achievable objectives and measurements that align with the Corporations mandate and resources. This process must be creative, engaging and fun!

3. SUBMISSION REQUIREMENTS:

To ensure your proposal is considered for evaluation, the respondent must ensure their proposal includes the following:

- Your recommendation on any Strategic Planning Best Practices for our consideration and how that could adjust the scope of work. In other words “Are we missing something?” in our planned approach.
- A detailed process on how you will accomplish the noted Scope of Work including any recommendations you make to our process
- How will you get the attention of those in our community who:
 - Are underserved in terms of equality and equity, and
 - Don’t already work with us, or even know us.
- A clear timeline.
- A detailed costing of the proposal
 - We have not identified a specific timeline or budget as we have learned from past RFPs that we need to hear from you and consider your perspectives and suggestions in order to finalize an approach that will enable us to succeed.
- A list of a minimum of three (3) references

The following must accompany all proposals

- Covering Letter
 - A covering letter advising that the Respondent has reviewed and understands the contents of the Request for Proposal package and is capable of meeting the requirements and timelines of their proposed services.
- Profile/Resume
 - A profile or resume of all principal staff assigned to the project, their respective roles, qualifications
 - A brief description of the organization as a whole.
- List and describe 1 comparable project completed by you or currently in progress.

4. REQUEST FOR PROPOSAL SUBMISSION TIMELINES:

Date of Issue:

June 16, 2022

Deadline:

The deadline for submission of proposals is July 12, 2022 4pm EDT

Proposals shall be submitted as a PDF document by email with the subject line “Data Gathering, Community Consultation and Strategic Planning for Muskoka Futures”. Submissions must be prior to the established deadline and addressed to:

David Brushey
Executive Director
Muskoka Community Futures Development Corporation
david@muskokafutures.ca

Inquiries:

Inquiries, interpretations and questions regarding elements of this Request for Proposals must be directed to David. Brushey by email to this address: david@muskokafutures.ca

Award:

We expect to award the contract no later than July 31, 2022.

The lowest priced proposal will not necessarily be accepted. Preference to proposals will not be based on price alone and will not be based upon any single criteria. Among the criteria that may be relevant are proven experience, references, reliability, price, timelines, and whatever additional other factors Muskoka Futures deems appropriate.

Obligations:

All proposals shall be irrevocable and remain open for acceptance for at least sixty (60) days after the closing date, whether or not another Proposal has been accepted. If a Proponent’s Proposal is accepted, the Proponent agrees to enter into agreement in accordance with the proposal conditions. Muskoka Futures incurs no obligation toward the successful Respondent, if any, until a contract (“the Contract”) is signed by the successful Respondent and Muskoka Futures. Muskoka Futures reserves the right after negotiation to introduce in the contract different or supplementary terms from the terms of the proposal. Muskoka Futures will not pay for the submission of the proposal in response to the RFP.

Review Process:

Upon closing, Muskoka Futures will review all proposals, for completeness and compliance to the guidelines outlined in this Request for Proposals. Significantly incomplete proposals will be rejected and will receive no further consideration.

Late Proposals will not be accepted.

CONFLICT OF INTEREST

To avoid a conflict of interest, the successful Proponent warrants that neither it, nor any of its officers,

directors or employees with the authority to bind the Proponent, has any financial or personal affiliation with any Board Member and/or employee of Muskoka Futures, or any elected official which might, in any way, be seen to create a conflict.

EVALUATION CRITERIA

The proposal will be evaluated based on:

- 1) Proposal Clarity
- 2) Approach to data gathering, community consultation and facilitation.
- 3) Relevant Experience
 - a) Applicants overall reputation, service capabilities and quality as it relates to this project.
 - b) A minimum of three referrals and references from other agencies and owners.
 - c) Applicants capacity and intent to proceed without delay if selected
- 4) Pricing

Candidates will be notified by Muskoka Futures after selection has been made.