



**CSHO**

**Cochrane Society for Housing Options**  
opening doors for you

**COCHRANE SOCIETY FOR HOUSING OPTIONS**

**REQUEST FOR PROPOSAL**

**CONSULTANT – Development of a Business Plan**

**Proposals shall be submitted in a sealed envelope entitled:**

**“Proposal for CONSULTANT – Business Plan”**

**to**

**Attention: Corinne Burns, Housing Coordinator  
Cochrane Society for Housing Options (CSHO)  
Box 2035 (mailing address)  
Unit #1, 209 – 2<sup>nd</sup> Avenue West (courier address)  
Cochrane, Alberta, T4C 1B8**

**up to the Closing Time: 12:00 Noon Mountain Standard Time,  
Thursday, January 31, 2019.**

**NOTES:**

Date and time of receipt will be recorded on the front of all Proposals received. The time of the closing shall be established by the time shown on the clocks used by the CSHO for that purpose. Include one hard copy and one electronic copy.

DO NOT SUBMIT BY FAX OR EMAIL

All queries related to this RFP shall be submitted in writing to the attention of:

**Corinne Burns, Housing Coordinator**  
**E-MAIL: [corinne.burns@cochrane.ca](mailto:corinne.burns@cochrane.ca) or [cburns@csho.ca](mailto:cburns@csho.ca)**

## **1.0 Description of Requirement**

This Request for Proposal ("RFP") identifies an opportunity for the successful Proponent to prepare a 5 year Business Plan that will identify opportunities in Succession Planning, Fund Development Planning, and how the plan objectives tie into long term operations and program development. The project is funded by Alberta Culture and Tourism, Community Initiatives Program. Proponents are required to have, and demonstrate in their proposal, the capacity, reputation, and experience in preparing Business Plans.

The proposal submission should include qualifications for the individual(s)/proponents who will participate in the project. The proposal submission should also include a budget outlining the costs/fee structure. Similar projects that have been completed in the previous five years of business practice can be presented for review.

## **2.0 Contract Requirements**

- 2.1 The contract will be for a one year term.
- 2.2 The successful Proponent will be able to begin project work immediately.
- 2.3 The successful Proponent will report to the Housing Coordinator and be required to work with stakeholder groups and staff to complete the Business Plan.
- 2.4 Project details will be finalized with the successful Proponent.
- 2.5 The successful Proponent is required to have a valid Town of Cochrane business license prior to contract execution.
- 2.6 The successful Proponent will be required to carry general liability insurance of no less than \$2,000,000.00 and will have all employees covered under WCB coverage.
- 2.7 Proponents must include references for business plans, needs assessments, implementation plans or similar documents completed in the past five (5) years.
- 2.8 If any of the terms set out therein are unacceptable to the Proponent, the Proponent must identify such terms and provide suggested alternatives in its Proposal. While the CSHO is not obligated to accept any alternative, all suggested alternatives will be considered during the evaluation process.
- 2.9 If the successful Proponent fails to execute and return the Agreement to the CSHO within fifteen (15) days, the CSHO may cease all discussions and have no obligation to the Proponent, and may, if they choose to do

so, award the Contract to another Proponent, all without affecting any claim which the CSHO may have against the Proponent as a result thereof.

### **3.0 Project Background**

The Town of Cochrane is a community of approximately 27,000 citizens situated to the west of the City of Calgary. Cochrane strives to maintain its rural heritage and small town character while experiencing annual significant population growth. Cochrane provides services to several nearby rural areas including, but not limited to: Bragg Creek, Bearspaw, Springbank, Westbrook and Beaupre.

The Cochrane Society for Housing Options (CSHO) is the municipal provider of the local affordable housing program. As well, CSHO participates in housing related education and advocacy activities. CSHO also owns and operates a social venture, Home Reno Heaven (HRH) which sells donated building materials and appliances. Profits from HRH are reinvested in housing related programs and services.

The Cochrane Society for Housing Options has been awarded a grant from Alberta Culture and Tourism to create a Business Plan focusing on Fund Development and Succession Planning. This project involves completion of a Business Plan including implementation initiatives. This project will involve a significant amount of stakeholder engagement. The successful proponent must be willing to work actively with the stakeholders, as well as leading focus groups or meetings that may occur during evening and weekend hours.

The CSHO is seeking an individual or firm to conduct the research needed to develop the Business Plan and identify Implementation Initiatives.

#### **Succession Plan Elements:**

- Examine current operational and program demands. Align staffing required to sufficiently address current needs;
- Align staffing required to complete Strategic Plan Elements;
- Anticipate staffing required to meet future needs as new programs/services arise (Must be linked to Strategic Priorities);
- Prepare budget to cover staffing, operational and capital costs of :
  - Current Needs:
  - Needs as identified in current Strategic Plan:
  - New Opportunities that arise that are linked to Strategic Priorities.
- Development Implementation Plan with Timelines.

#### **Funding Plan Elements:**

- Examine current funding raising and budgeting practices;
- Explore ways to increase funding through current fund raising;

- Explore new ways to raise funds;
- Explore ways to improve budgeting practices;
- Explore other options to increase Grant Funding Opportunities and Net Income (e.g. Explore obtaining Charitable Status);
- Develop a Funding Plan that is linked to the Succession Plan Budget;
- Develop Implementation Plan with Timelines.

**Other Elements:**

- Identify how the plan objectives tie into long term operations and program development.
- Develop Implementation Plan with Timelines where applicable.

#### **4.0 Project Scope**

- 4.1 The successful Proponent will attend to all aspects of the project including data collection methods, focus group and workshop material development, and quantitative and qualitative analysis.
- 4.2 CSHO will aim to complete the project by December 31, 2019. In their proposal, proponents should outline and explain how they will approach and complete this project including budget, important deliverables and identified deadlines.
- 4.3 Upon completion of the year contract, the CSHO may extend the contract for the successful Proponent. This extension will be based on performance to date and available funding to continue the contract.
- 4.4 The successful Proponent will work with the Housing Coordinator, CSHO Board of Directors, CSHO staff and volunteers, and community stakeholders where applicable.
- 4.5 The successful Proponent, working with the Housing Coordinator, will be required to prepare regular updates to the CSHO Board of Directors.

#### **5.0 Inquiries and Clarifications**

- 5.1 It is the responsibility of the Proponent to satisfy itself as to the full requirements of this RFP. Inquiries are to be in written form only, e-mailed to the contact person shown on the cover page. If required, an addendum will be issued to all Proponents.

#### **6.0 Conflict of Interest**

- 6.1 By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind them, has any financial or personal relationship or affiliation with any elected official or employee of the CSHO in their immediate families which might in any way be seen to create a conflict.

## 7.0 Submission of Proposal

- 7.1 By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind is formed under, or arises from, this RFP prior to the signing of a formal written Contract.
- 7.2 The Proponent shall submit 1 hard copy of its Proposal and an electronic copy with all accompanying schedules, appendices or addenda in a sealed envelope or package marked with the Proponent's name and the RFP title up to the Closing Time set out on the date and at the location shown on the title page of this RFP.
- 7.3 Proposals received after the Closing Time or in locations other than the address indicated, will not be accepted and will be returned. The CSHO may elect to extend the Closing Time.
- 7.4 Amendments to a Proposal may be submitted if delivered in writing prior to the Closing Time in a sealed envelope or package, marked with the Proponent's name and the RFP title.
- 7.5 Proposals may be withdrawn by written notice only, provided such notice is received at the administration office of the CSHO prior to Closing Time.
- 7.6 Proponents are solely responsible for their own expenses in preparing and submitting Proposals, and for any meetings, negotiations or discussions with the CSHO, its representatives and consultants, relating to, or arising from the preparation of a bid on this RFP. The CSHO, its representatives, agents, consultants and advisors will not be liable to any Proponent for any claims including, but not limited to; costs, expenses, losses or damages, loss of anticipated profits, or for any other matter incurred by the Proponent in preparing and submitting a Proposal, participating in negotiations for a Contract, or other activity related to or arising out of this RFP.

## 8.0 Evaluation of Proposals

- 8.1 Proposals will be evaluated on the basis of the overall best value to the CSHO. The CSHO has no obligation to select the lowest fee Proposal.
- 8.2 The following established criteria and weighting will be used:

<b>Evaluation Criteria</b>
<p><u>1. Experience</u></p> <ul style="list-style-type: none"> <li>▪ Expertise related to conducting needs assessments.</li> <li>▪ Experience in developing Business Plan and/or Implementation Plans.</li> <li>▪ Experience in working from a community based approach.</li> <li>▪ Knowledge of CSHO, Cochrane community and immediate surrounding rural</li> </ul>

areas.
<p><b>2. Methodologies &amp; Approach</b></p> <ul style="list-style-type: none"> <li>▪ Clear presentation and outline of proposed methodologies and processes to complete the Business Plan &amp; Implementation Plan.</li> <li>▪ Clear explanation of what will be completed in the one year contract.</li> <li>▪ Clear identification of services included, with any optional or excluded services assumed to be provided by others.</li> <li>▪ Identification of major issues, challenges, and risks.</li> <li>▪ Includes project schedule, milestones, and delivery dates.</li> </ul>
<p><b>3. Innovation</b></p> <ul style="list-style-type: none"> <li>▪ Clear explanation of what sets the Proponent apart from the rest in their approach and offerings.</li> <li>▪ Consultant's innovation in its approach to the project including any recommended alternatives, efficiencies and originality.</li> </ul>
<p><b>4. Project Cost</b></p> <ul style="list-style-type: none"> <li>▪ Clear breakdown of all costs resulting in a fixed fee including expenses and disbursements for the year contract</li> </ul>

8.3 Points will be assigned for each criteria based on the information provided by the Proponent in the proposal. The highest evaluated Proposers will be short-listed and will be required to participate in a presentation/interview process. Based on the results of the interview process, the CSHO will undertake to negotiate a final contract with the selected Proponent.

## **9.0 Acceptance and Rejection of Proposals**

9.1 This RFP is not a tender and does not commit the CSHO, in any way, to select a preferred Proponent, to proceed to negotiations for a Contract, or to award any Contract. The CSHO reserves the complete right to, at any time, reject all Proposals and terminate this RFP process.

9.2 Notwithstanding any other provision in the Proposal documents, the CSHO has in its sole discretion, the unfettered right to:

- 9.2.1 accept any Proposal;
- 9.2.2 reject any Proposal;
- 9.2.3 reject all Proposals;
- 9.2.4 accept any Proposal partially and reject specific items or locations in part or in whole;
- 9.2.5 accept a Proposal which is not the lowest priced Proposal;
- 9.2.6 accept a Proposal that deviates from the Requirements, Specifications or the conditions specified in this RFP;
- 9.2.7 reject a Proposal even if it is the only Proposal received by the CSHO;
- 9.2.8 cancel this RFP at any time for any reason (with or without commencing a new RFP process in its place).

- 9.3 All Proposals shall be irrevocable and remain open for acceptance for at least thirty (30) days after the Closing Time, whether or not another Proposal has been accepted.
- 9.4 Any deviation from the Requirements or the conditions specified in this RFP must be clearly stated in the Proponent's Proposal. The CSHO will be the sole judges as to what constitutes an acceptable deviation. If no deviations are indicated in the Proponent's Proposal, the CSHO will be entitled to interpret that the Proponent offers to perform in full compliance of the Requirements and conditions stated herein.
- 9.5 A Proposal which contains an error, omission, or misstatement, which contains qualifying conditions, which does not fully address all the requirements of this RFP may be rejected by the CSHO in whole or in part.
- 9.6 All proposals and accompanying documentation received in response to this RFP will become the property of the CSHO and will not be returned.

## **10.0 Freedom of Information and Protection of Privacy Act**

- 10.1 The CSHO is subject to the Province of Alberta Freedom of Information and Protection of Privacy Act.