

Please submit responses via email only to:

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Please submit by: April 28, 2018

REQUEST FOR PROPOSALS

PROJECT: Green Trails Strategy Plan

Proposals submitted after the due date will not be considered. Consultants accept all risks of late delivery or spam delivery submittals regardless of fault.

Kawartha Lakes Green Trails Alliance reserves the right to reject any and all submittals and to waive irregularities and informalities in the submittal and evaluation process. This RFQ does not obligate Kawartha Lakes Green Trails Alliance to pay any costs incurred by respondents in the preparation and submission of their proposals. Furthermore, the RFP does not obligate Kawartha Lakes Green Trails Alliance to accept or contract for any expressed or implied services.

General Information

PURPOSE/BACKGROUND: Kawartha Lakes Green Trails Alliance ("KLGTA") is soliciting requests for proposals for the purpose of developing a five-year strategic plan for the organization. In particular, KLGTA wants the organization be analyzed from a perspective of financial sustainability, governance and mandate.

BRIEF SCOPE OF SERVICES: Consultant(s) shall provide a scope of work and project proposal in accordance with the information provided in this request. The Proposal must include the following elements:

- Detailed work plan that identifies the major areas of work
- An estimated proposed timeline for deliverables
- Detailed cost estimates
- Note: we do not anticipate travel as a requirement to complete this project.

QUALIFICATIONS:

This project will require the consultant(s) to have the following qualifications:

- Five (5) or more years of related experience
- Masters degree in business, non-profit management, economics or other related field
- Experience working with non-profit or public entities
- Extensive experience creating financial models, developing business plans, and forecasting budgets.

SUBMITTAL REQUIREMENTS: Responses to this RFP must include the following information:

- A cover letter/statement of interest indicating the consultant's interest in the project and highlighting its qualifications to perform this project.
- A summary of consultant's experience in requested service areas, highlighting the consultant's experience working with non-profit entities..
- Statement of qualifications, including related experience with similar types of projects and specific qualifications or resumes of key team members-.
- Scope of Work and Project Proposal, including a proposed schedule with key milestones and deliverable dates, and cost estimates.

- A minimum of three (2) references relating to completed projects for the services being requested with full name, title, address, phone and email address.
- Responses must be limited to no more than five (4) sheets excluding specific project examples, references, resumes and covers.

EVALUATION CRITERIA: Evaluations will be based on the criteria listed below:

- Experience of consultant(s) with similar projects;
- Overall quality of statement of qualifications; and
- Proposals within budget restrictions and timeframes

QUESTIONS: Questions regarding this project may be directed to Barb MacPherson via e-mail at barbmacpherson.trails@gmail.com

ATTACHMENT "A"
KTCTA Strategic Plan
SCOPE OF SERVICES

PROJECT OBJECTIVE

This project will begin with a comprehensive analysis of KTCTA annual budget and spending patterns. Key projects and programs will be broken down into their financial components, and analyzed for sustainability at current level and potential for funded growth.

PROJECT DESCRIPTION

Through our 11 years of existence, we have been supported by community donations, earned income and grant funding. As we have grown and established ourselves in the community we seek assistance in modifying our income streams and organizational structure to maximize self-sufficiency. We seek the following:

1. Consultant will conduct an environmental scan of current position and funding environment. The scan shall evaluate the sustainability of all major programs and the life cycle of the entire organization.
2. Funding requirements will be forecasted for the next five years and a corresponding plan will be created.
3. Strategies will be developed for increasing earned income and organizational goals and objectives. The consultant will also identify areas for growth through annual appeals and local fundraising.
4. An emphasis will be placed on strengthening and diversifying the organization and its financial sustainability. An action plan will be developed to implement this change in several stages facilitated by the consultant.

ITEMS FURNISHED BY KTCTA

- Access KTCTA directors and supporters to ask questions and gain insight on current budgeting, governance and projects for the strategic plan.
- Historical data on grant applications and acceptance rates.
- Annual budgeting that forecast the annual expenses associated with KTCTA.
- Other items deemed necessary for data collection, analysis and to develop an action oriented strategic plan.

ITEMS TO BE DELIVERED TO KTCTA

- Strategic analysis of current organization structure, decision making and financial situation.
- Survey of potential supporters of KTCTA
- 5-year strategic plan to develop a new mandate, increase revenues and awareness and improve overall governance.
- Hands on assistance in execution of financial plan.
Formal Strategic Plan in electronic format