



## **WESTON VILLAGE BUSINESS IMPROVEMENT AREA (WVBIA)**

**Request for Proposal**

**Weston Village BIA Strategic Plan**

**Deadline: October 31, 2022**

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### **Request for Proposals**

### **Weston Village BIA Strategic Plan**

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#### **Project Overview**

The Weston Village Business Improvement Area (WVBIA) has determined the need for a strategic plan to help review their **current focus and direct their short and long term efforts**. They are looking for a firm that will guide them through the process and provide a complete, actionable strategic plan as the primary deliverable.

#### **Organization Background**

The Weston Village Business Improvement Area (WVBIA) is an association of local businesses and commercial property owners that was formally established in 1979. The WVBIA is located primarily along Weston Road, north to Church Street and south to Wilby Crescent; west on Lawrence Ave to Hickory Tree Rd and east on Lawrence Ave to South Station.

The WVBIA is home to some of Toronto's best restaurants, specialty shops, fashion, retail and service stores.

There are over 160 merchants and property owners who are members of the WVBIA. Its board of management is comprised of members from within the designated area who are elected to the board by the membership and includes the municipal councillors from Ward 11.

The WVBIA is responsible for the promotion and beautification of the neighbourhood businesses through improvements of streetscapes, staging festivals and special events. The WVBIA holds annual events including Weston Village BIA Farmers' Market and Winterfest.

For more information, please visit <https://www.westonvillagebia.com/>

#### **Project Scope**

WVBIA is seeking a Toronto-based vendor (consultant/firm) to facilitate a strategic planning process that will provide guidance on our current strategy and provide improvements of the organization. In close collaboration with the WVBIA Board and in consultation with the WVBIA membership, the successful proponent will create a Weston Village BIA Strategic Plan that will include:

- Formalization of the vision, mission and core values of the Weston Village BIA
- A review of our current events and programs with suggestions for improvements on current events
- A review of the WVBIA current advertising and promotion strategy, and upgrading as necessary
- Identification of new programs and events where WVBIA can provide the most impact for its members.
- A procedure for working with new and existing developers within the BIA boundaries during the planning process.

The plan will include long-term goals and short-term objectives and anticipate the challenges **WVBIA** will face in the future. The plan should also consider creative and sustainable strategies to help support organizational long-term goals and operations. **The vendor will be responsible for providing expert advice and facilitation throughout the project, while being responsive to WVBIA Board identified priorities and the following key deliverables:**

- Assist the organization in its next integrated planning cycle, and ultimately, in the development of a comprehensive and sustainable Weston Village BIA Strategic Plan to anchor and guide WVBIA activities over the next four (4) years.
- Identify a critical path with relevant timeframes for the development of the integrated strategic- operational plan.
- Facilitate planning sessions to map out WVBIA’s future.
- Design an effective method for data gathering, synthesis, and presentation, including document review, online surveys, focus groups, and stakeholder meetings.
- Guide all stages of the integrated planning process, including meetings with WVBIA Board, association members, staff, and key external stakeholders.
- Assist in a review of WVBIA’s vision, mission, goals and objectives.
- Align the organization’s future operational objectives to support proposed vision, mission, goals and objectives, such as (but not limited to):
  - \* board and member support;
  - \* technical and/or capital resources to run the organization effectively;
  - \* third-party consultant needs;
- Branding and marketing, including a social media strategy
- The final plan must consider both strategic and tactical/operational elements and present an execution plan that includes objectives, recommended tactics, timing/timeframes, budgets, and key points for responsibility (SWOT Analysis).

The consultant will report directly to the WVBIA Board of Management. The consultant can expect that WVBIA will assist in the logistics related to planning for stakeholder meetings and WVBIA will be available to provide meeting facilitation support.

### **Project Schedule**

The following is a planned schedule. Depending upon the number of proposals, intended completion dates may change.

| <b><i>Date</i></b>    | <b><i>Deliverable</i></b>   |
|-----------------------|---|
| September 30, 2022    | Call for Request for Proposal (RFP)   |
| October 31, 2022      | RFPs due  |
| November 10, 2022     | Review of proposals complete and successful candidate notified                      |
| December 2022         | Stakeholder Meetings Held   |
| January/February 2023 | Draft of the strategic highlights presentation (for review and approval by members) |

|            |   |
|------------|---|
| March 2023 | Draft of strategic – operational plan         |
| April 2023 | Final integrated strategic – operational plan |

### **Bidders Qualifications**

It is expected that the successful firm will be based in Toronto, Canada and have:

- Demonstrable recent experience and understanding of the non-profit sector.
- Understanding of Business Improvement Areas.
- Extensive strategic and operational planning experience.
- Experience coordinating and facilitating planning processes that result in comprehensive and sustainable integrated strategic-operational frameworks.
- Business planning and financial analytics experience and background.
- Relevant academic / industry qualifications.

### **Proposal Quality**

Proposals should highlight:

- Demonstrated knowledge of organizational effectiveness, continuous quality improvement, and efficiency in volunteer/ not for profit boards.
- Demonstrated experience in organizational development and enhanced performance.
- Relevant experience and success in strategic-operational planning facilitation, including the level of satisfaction of current and past clients.
- Adequacy of approach and methodology.
- Completeness of the proposal.

### **Submission 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 examples of projects in similar size and scope and client references with permission to contact.
2. Identify the Project Manager and other specific people who will be performing the work and their individual experience and qualifications.
3. A critical path with recommended tasks and associated timelines.
4. A detailed outline of the deliverables to be provided.
5. An indication of the investment and work that will be required by the WV BIA
6. A fee identifying the total cost of the work and price schedule breakdown. The total cost must include all services and reimbursable expenses. No extras or claims will be entertained unless the scope of work changes.

*Proposals may include supplemental information that strengthens submissions.*

Responses to this call for proposal submission should be addressed to WV BIA and sent electronically in PDF format **by October 31, 2022** to [admin@westonvillagebia.com](mailto:admin@westonvillagebia.com).

## **Communication**

Prospective bidders may approach Audrey Swartz, Board Coordinator, about this project. The questions should be submitted in writing via e-mail, no later than October 20, 2022 to [admin@westonvillagebia.com](mailto:admin@westonvillagebia.com)

The goal is to answer each question within two working days of its receipt. The answers to questions will be distributed to all bidders who have informed the Board Coordinator, WV BIA of their intent to make submissions. Questions and Answers will also be posted via email to all proponents.

## **General Conditions**

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### **Conflict of Interest**

Proponents must disclose to WVBIA in their Proposal any potential conflict of interest, including any which may involve WVBIA employees, membership or members / employees of agencies, boards, or commissions who may have a financial interest in the Proponent's firm. If such conflict of interest does exist WVBIA may, at its discretion, refuse to consider the Proposal.

### **Right to Amend RFP**

WVBIA reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all proponents through the WVBIA website.

### **Bidder Incurred Costs**

All costs incurred in the preparation and presentation of proposals in any way whatsoever shall be wholly absorbed by the bidder(s).

### **Indemnity**

The bidder(s) will indemnify and save harmless WVBIA from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained, done or omitted by WVBIA at any time before or following termination of the agreement.

### **Acceptance of Proposals**

WVBIA is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in light of the evaluation criteria specified above.

### **Evaluation & Selection of Proposals**

At least three (3) members of the WVBIA Board will evaluate all complete proposals, and may request to conduct in-person interviews with the top proponents. The right is reserved to make an award based directly on the proposals submitted or to negotiate further with one or more proponents.

By responding to this RFP, proponents will be deemed to have agreed that the decision of the Selection Committee will be final and binding. The selection of the proponent will be based on the cost as well as the following criteria: Proponent Profile, Experience and Qualifications of the Proponent, Proposed Staff Team and Resources, Creativity and Innovation and Work Plan and Deliverables.

### **Ownership**

The proposal shall be the property of WVBIA and shall not be published or released without the written consent of YLV BIA.