



Condominium Management Regulatory Authority of Ontario  
Request for Proposal

RFP #20240325

Strategic Planning Facilitator

Issue date: March 25, 2024

Closing date: April 12, 2024 at 5:00pm EST

Location: Toronto, Ontario

## 1. Invitation

The Condominium Management Regulatory Authority of Ontario (CMRAO) invites proponents to submit proposals to facilitate the Board's Strategic Planning exercise and development of the Strategic Plan for 2025-2028.

## 2. Overview of the Organization

The CMRAO is the regulatory body that sets standards and enforces the mandatory licensing of condominium managers and condominium management provider businesses. The CMRAO was established to provide stronger consumer protection for Ontarians living in condominiums. Through effective regulation, the CMRAO strengthens the condominium management profession and helps to protect consumers in Ontario's complex and rapidly growing condominium sector.

**Mission:** To enhance consumer protection through modern and effective regulation of the condominium management sector.

**Vision:** Public confidence that the assets of condominium communities are well managed and protected

### Values

- Building Trust
- Service Excellence
- Diversity and Inclusion
- Learning Organization

### Strategic objectives (2022 - 2025):

- Operate as a Digital-First Modern Regulator
- Focus on Service and Operational Excellence
- Promote Strategic Stakeholder Engagement
- Deliver value for Money
- Foster Operational Excellence

The Strategic Plans as well as business plans and annual reports of the CMRAO are available in the [Corporate Reporting](#) section of the CMRAO website. The CMRAO is a non-profit corporation governed by an independent Board of Directors accountable to the Ontario Ministry of Public and Business Service Delivery. More details about the Board composition can be found [here](#).

### **3. Scope of the Assignment**

The purpose of the present Request for Proposals (RFP) is to engage a consultant or consulting firm to:

- a. Conduct an environmental scan of the condominium sector (current state of condo sector and policy environment) in Ontario.
- b. Engage in discussions with the Board (two days)
- c. Facilitate a one-day strategic planning session with the Board of Directors and senior management of the organization which will result in the creation of a Strategic Plan for the period 2025-2028. This session would take place in Summer 2024 and will be held in person.
- d. Attend a Board meeting in Fall 2024 and present the draft strategic plan to the Board if required.

### **4. Required Proposal Content**

In order to assist us in our review of your submission, please include in your response:

- Firm Qualifications
  - Brief overview of the consultant's/firm's experience with strategic planning and special research projects
- Service Team
  - Name(s) of the facilitator(s) and relevant experience
- Approach
  - Description of your approach
- Additional Services or Firm Differentiators
  - Description of other services or firm differentiators of interest to the CMRAO
- Fees
  - Full cost for completion of the deliverables, provided in Canadian funds, inclusive of all applicable duties and taxes. The fee structure should be broken down by each phase of work, if applicable, as the CMRAO retains the right to accept some, all, or none of the proposed phases.
- References
  - Provide contact information for at least two references that are current or former clients that have used your services as facilitator for strategic planning sessions. References should be recent (e.g., within the past two years).

### **5. Cost Related to the Preparation of Proposal**

No payment direct or indirect will be made for costs that may be incurred relative to the preparation or submission of a proposal in response to this RFP.

## 6. Conflict of Interest

In order to protect the integrity of the procurement process, bidders are advised that the CMRAO may reject a bid in the following circumstances:

- If the Bidder, any of its subcontractors, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
- If the Bidder, any of its subcontractors, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other bidders and that would, in the CMRAO's opinion, give or appear to give the Bidder an unfair advantage;
- The experience acquired by a bidder who is providing or has provided the services described in the bid solicitation (or similar services) will not, in itself, be considered by the CMRAO as conferring an unfair advantage or creating a conflict of interest. This bidder remains, however, subject to the criteria established above.
- Where the CMRAO intends to reject a bid under this section, the CMRAO will inform the Bidder and provide the Bidder an opportunity to make representations before making a final decision. Bidders who are in doubt about a particular situation should contact the CMRAO before the Inquiries and Communications deadline.

**By submitting a bid, the Bidder represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Bidder acknowledges that it is within the CMRAO's sole discretion to determine whether a conflict of interest, unfair advantage, or an appearance of conflict of interest or unfair advantage exists.**

## 7. Timeline

Activity	Timeframe	Contact information
Deadline for proposal submission	April 12, 2024, 5:00pm EST	A PDF file with the title <i>CMRAO_Strategic Planning Facilitator Proposal_[name of bidder]</i> to be submitted to <a href="mailto:procurement@cmrao.ca">procurement@cmrao.ca</a>
Deadline for RFP inquiries	April 5, 2024, 5:00pm EST	Nikki Hera – Director, Corporate Services <a href="mailto:procurement@cmrao.ca">procurement@cmrao.ca</a>
Notification of successful bidder	May 2024	

All timelines in this proposal are tentative and may be changed by the CMRAO at its sole discretion.

## **8. Consultant Selection Process and Proposal Evaluation**

The CMRAO will evaluate all proposals. The finalists may be called for interviews with an evaluation team or may be asked to answer questions to clarify aspects of their submission. The evaluation team will recommend one of the finalists for final contract award.

Proposals will be evaluated utilizing the criteria summarized below:

- Qualifications and prior experience of the firm or consultant in conducting similar projects
- Overall project design and methodology.
- Price for the scope of services requested.

## **9. Confidentiality**

By accepting to take part in this proposal process you agree to keep in confidence all information imparted to you in relation to the proposal process, not to disclose it to third parties and not to use it for any other purpose than for the proposal.

The CMRAO will hold all information provided during the proposal process confidential, with the exception of queries made by proposing firms.

The CMRAO reserves the right to share queries received with all firms providing proposals.

## **10. Interpretations**

The CMRAO will be the sole and exclusive judge of quality and compliance of services submitted. The CMRAO reserves the right to award this contract in any manner it deems to be in the best interest of the CMRAO and make the selection based at its sole discretion, including negotiating with one or more of the bidders.

## **11. Terms and Conditions**

1. Any questions about this RFP are to be emailed to the contact provided no later than the date specified in the deadline.
2. All submitted proposals will become the property of the CMRAO and will not be returned.
3. Bids will be accepted from organizations and individuals.

4. All information provided by or obtained from the CMRAO in any form in connection with this RFP either before or after the issuance of this RFP:
  - a. is the sole property of the CMRAO and must be treated as confidential.
  - b. is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract.
  - c. must not be disclosed without prior written authorization from the CMRAO; and
  - d. shall be returned by the proponents to the CMRAO immediately upon the request of the CMRAO.
5. All proposals must include an agreement on the confidentiality of the work to be conducted.
6. All proposals must include a statement that the individuals involved in providing services in the proposal are free from any conflict of interest that may compromise the integrity of the services to be provided.
7. The proponent shall bear all costs associated with or incurred in the preparation and presentation of its proposal including, if applicable, costs incurred for interviews or demonstrations.
8. All of the provisions of this RFP are deemed to be accepted by each proponent and incorporated into each proponent's proposal.
9. The CMRAO shall have the right to rescind any contract awarded to a proponent if the CMRAO determines that the proponent submitted any inaccurate or incomplete information to the CMRAO. This right shall be in addition to any other remedies the CMRAO may have in law or in equity.
10. The CMRAO reserves the right to:
  - a. make public the names of any or all proponents.
  - b. request written clarification from any proponent and incorporate a proponent's response into the proponent's proposal.
  - c. assess a proponent's proposal on the basis of:
    - i. information provided by references.
    - ii. the proponent's past performance on previous contracts.
    - iii. any information provided by a proponent in relation to this RFP process; or
    - iv. other relevant information that arises during this RFP process.
  - d. waive formalities and accept proposals that substantially comply with the requirements of this RFP.

- e. verify with any proponent or with a third party any information set out in a proposal.
  - f. check references other than those provided by any proponent.
  - g. solely determine whether any situation or circumstance constitutes a conflict of interest.
  - h. disqualify any proponent and/or rescind any contract awarded to a proponent whose proposal contains misrepresentations or any other inaccurate or misleading information.
  - i. disqualify any proponent or the proposal of any proponent who has engaged in conduct prohibited by this RFP.
  - j. make changes, including substantial changes, to this RFP, by way of addenda.
  - k. select any proponent other than the proponent whose proposal reflects the lowest cost to the CMRAO.
  - l. cancel this RFP process at any stage.
  - m. cancel this RFP process at any stage and issue a new RFP for the same or similar deliverables.
  - n. negotiate with any or all proponents.
  - o. accept any proposal in whole or in part; or
  - p. reject any or all proposals.
11. These reserved rights are in addition to any other express rights or any other rights that may be implied in the circumstances.
12. The CMRAO shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any proponent or any third party resulting from the CMRAO exercising any of its express or implied rights under this RFP.
13. By submitting its proposal, the proponent authorizes the collection by the CMRAO of the information set out under 10(e) and (f) in the manner contemplated in those subparagraphs.