

# Parkdale Neighbourhood Land Trust



## REQUEST FOR PROPOSALS:

Consulting Services  
Organizational Business Plan Development  
the Parkdale Neighbourhood Land Trust

PROPOSAL CLOSING DATE & TIME:  
Monday February 15 2016. 5:00 PM EST

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# SUMMARY

## 1.1 Summary of RFP

The Parkdale Neighbourhood Land Trust (PNLT) seeks a Business Planner to help build a sustainable business plan for a not for profit community-based land ownership organization. PNLT's mission is to promote and enable community ownership of land, and to alleviate poverty through the lease of community-owned land to providers of affordable housing, affordable community and commercial services (including social enterprise), urban agriculture, and other community supports and amenities. The PNLT also functions as a vehicle for community-wide engagement in local land use issues.

Working closely with the Development Coordinator and under the direction of the Board and its committees, the Business Planner will work as a consultant and be responsible for the development a sustainable business plan for the land trust. The ideal candidate will be experienced in non-profit financial models, real estate, land development, affordable housing, social enterprise and committed to finding innovative ways to ensure financial sustainability for a model of community land stewardship. A strong commitment to neighbourhood inclusiveness, social equity, and eagerness to develop a new community based land use management model is essential.

## 1.1 About the Parkdale Neighbourhood Land Trust

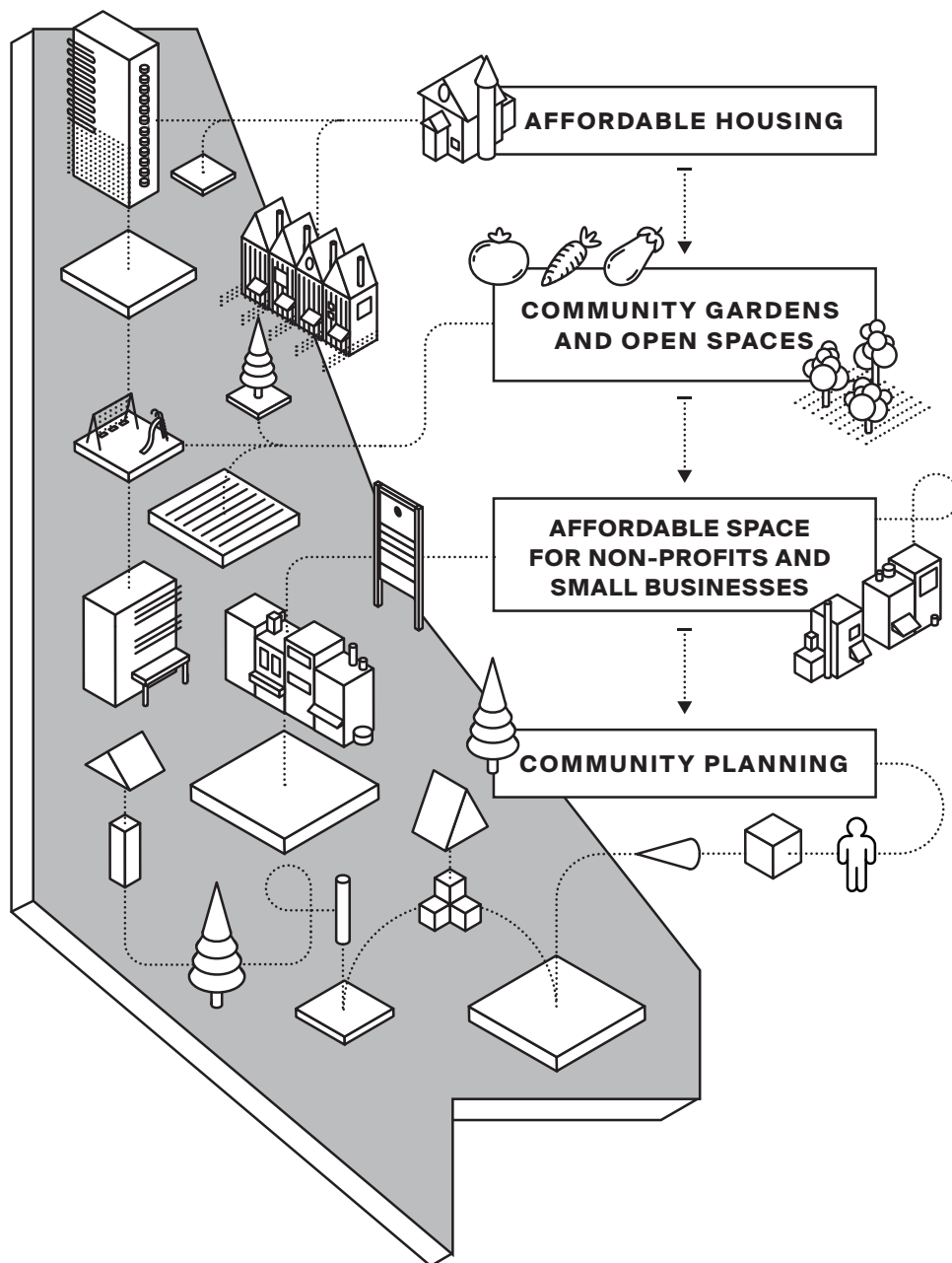
The Parkdale Neighbourhood Land Trust (PNLT) is a non profit organization that seeks to build a just, healthy, and inclusive neighbourhood. The PNLT will acquire and manage land under the unique community ownership model of a community Land Trust (CLT), promoting long-term community benefits, affordability, and enabling democratic local planning. PNLT will provide affordable and secure long-term leases of land to charitable and non-profit partners who can provide affordable and supportive housing, open space for community agricultural gardens and space for community economic development activities.



# Project Outline

## 2.1. Project Background

The Parkdale Neighbourhood Land Trust was established and incorporated in 2012 by local residents and agencies that represent the diversity of Parkdale. In late 2014, under the trusteeship of the Parkdale Activity Recreation Center (PARC), the PNLT received a three-year capacity building grant from the Ontario Trillium Fund. This award is enabling Toronto's first neighborhood based urban Community Land Trust (CLT) to develop a model for the community ownership of land that ensures long-term affordability and community benefit. As part of PNLT's organizational development activities PNLT will retain consulting services to develop a sustainable organizational business plan. This plan must account for both the base operational needs of PNLT, as well as a models for expansion through land acquisition, development and land stewardship. The preferred start is March 2016 and the final deliverables are expected by the end of July 2016.



## 2.2. Project Outline & Deliverables

### Phase 1: Benchmarking and Model Evaluation

- Review of Strategic Plan and consultation with the board on the needs and priorities of PNLT now and in the next 5 years. (e.g. operate a community land trust, full time coordinator to support Board + working committees, office space, provide educational programs to the public, undertaking project specific feasibility studies and business plans, capital project development, offer leaseholds to affordable housing providers, work with partners to acquire affordable housing, urban agriculture land, and commercial space).
- Research 3 case studies on CLT and / or shared equity and social purpose real-estate organizational business models in comparable urban settings with a special consideration of their land acquisition strategies.
- Review, critique and make recommendations on an initial feasibility analysis for 5 local land acquisition opportunities
- Review existing PNLT research on Toronto's Non-Profit Housing Providers and develop recommendations on optimal operating partnership models
- Develop & present interim report and findings to the board and consult with board to further develop the model PNLT would like to move forward on.

### Deliverables:

- Interim report summarizing findings, evaluation of current and 5 year operational needs, 3 appropriate and informative organizational business model case studies, analysis of 5 feasibility scenarios, as well as initial recommendations for which features and/or models as well as operational partnerships would best fit the current and future-desired operation of PNLT.

### Phase 2: Business Plan Design and Finalization

Develop business plan based on the model selected by the Board of PNLT and create a business plan tailored to PNLT's current operations, existing and future goals. This should include:

- Financial cash flow projections
- Human resource requirements
- Land acquisition and development pro-formas
- Mortgage and lending instruments
- Land leasing revenue projections including market rate leases and other legal due diligence related to land acquisition
- Consideration of cost of municipal approval process
- Proposed operational partnership & model
- Organizational restructuring/ recommendations
- Potential capital sources
- Additional revenue generation recommendations
- Provide a draft business plan to Board for review and input
- Revise and finalize Final Report and Business Plan

### Deliverables:

- Final report containing the detailed business plan model and timeline for the next 5 years to phase in necessary activities to comply with the new model.
- Final presentation of the plan and key steps for the Board to complete in the next 6 months.

## 2.3. Project Timeline

Benchmarks	Deadline
Proposals Received	February 15th 2016
Successful candidate notified	March 04 2016
Phase 1 start	March 2016
Phase 1 end	April 2016
Phase 2 start	May 2016
Phase 2 end	June 2016
Draft Business Plan	July 2016
Final Business Plan	July 2016

## 2.4 Project Budget

The fee-for-service budget for this scope of work is \$15000. However, the quality of the technical component of any proposal and the expertise of the firm/consultant will be considered in negotiating the final price for the services to be rendered.

## 3.0 Proposal Evaluation

Proposals submitted in response to this RFP will be evaluated by a committee comprised of PNLT Board Members & Staff according to the following criteria:

- Cost/Benefit to PNLT
- Consultant/Firm Relevant Experience and Qualifications
- Work Plan/Scope of Work
- Compliance with Proposal Requirements
- Value-Added or Innovative I

Proponents may be contacted following the submission deadline for an interview or to answer clarifying questions regarding proposal content if necessary.



## 4.0 Proposal Requirements

Proposals must be formatted to print 8.5x11 paper size. Electronic submissions must be formatted in PDF file format. All proposals must contain the following information:

### A. Cover letter/Introduction (1 page max)

Include summary of understanding of the project, the firm or individual(s) name(s) that will be providing the requirements stated in this RFP and overview of approach to the work.

### B. Work Plan (1 page max)

Explain the process you will follow to accomplish the deliverables listed above, including methodology, milestones, and recommended timeline. Briefly describe your firm's project management process.

### C. Qualifications (1 page max)

Describe overall services you can offer in response to the stated requirements. Preference will be given to candidates who can demonstrate:

- Experience working with non-profit affordable housing organizations and in particular shared equity housing models (CLTs, Cooperatives, Limited Equity, Rent geared to income).
- Strong understanding of technical tools and mechanisms commonly used in shared equity housing models including: Land Leasing, third mortgages, cross subsidy, right of first refusal, etc.)
- Proficiency in community development finance
- Strong understanding of real estate and mortgage financing including community based models (eg. community bonds),
- Knowledge of Toronto's present day real estate market
- Familiarity with required municipal approval processes for development
- Knowledge of the operational responsibilities of charitable organizations receiving gifts of land as well as land and asset management.
- Experience working with membership driven and community based organizations
- Strong computer skills

### D. Overall project cost and pricing details (1 page max)

Include an itemized estimate for deliverables; provide specific costs for individual activities where applicable. If the execution of work to be performed requires the hiring of sub-contractors you must clearly state this in your proposal. Subcontractors must be identified and the work they will perform must be defined. PNLT reserves the right to approve all sub-contractors assigned to the project. The total price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees. Please also include expected disbursement.

### E. Client list and summary of related work/successes

Include a brief description of the role you/your firm played in each project.

### F. References

Provide at least three references for projects with similar deliverables to those outlined for this project. Indicate which services were provided to each customer.

### G. Resumes/CV

Include resumes for key personnel working on this project.

## 5.0 RFP Close Date and Time

All proposals must be received by 5:00 PM EST on Monday February 15th 2016. Proposals are acceptable electronically (via email). Please submit proposals to: [Joshuabarndt@pnlt.ca](mailto:Joshuabarndt@pnlt.ca)

## 6.0 Communication

Please direct all inquiries concerning this RFP document via email to:

Joshua Barndt, PNLT Development Coordinator  
[joshuabarndt@pnlt.ca](mailto:joshuabarndt@pnlt.ca)  
No phone calls please.

Please allow 72 hours for a response to be received.

Note: An HST number must be provided if the successful firm would like to be reimbursed for HST.

## 7.0 Additional information about PNLT

PNLT 1 pager: <http://www.pnlt.ca/wp-content/uploads/2015/04/PNLT-HANDOUT.pdf>

PNLT Purpose, Vision, Values: <http://www.pnlt.ca/wp-content/uploads/2015/04/Purpose-Vision-Values.pdf>

PNLT Strategic Plan: [https://drive.google.com/open?id=0B6\\_oXhdvmAd4YnJMcjE0cmc1akk](https://drive.google.com/open?id=0B6_oXhdvmAd4YnJMcjE0cmc1akk)

