



Memorandum

To: Sharon McCormick, Blue Mountains Attainable Housing Corporation (BMAHC)
From: StrategyCorp Inc.
Date: 2020-08-20
Re: Consulting Services Update

Overview

This memorandum summarizes the work completed to date under Phase III: RFP Development, Issuance, and Management of our Agreement dated April 4, 2019, as well as additional effort related to work that was out of scope under our Agreement, or additional effort related to changes in under the RFI and in preparation of the RFP.

Under Phase III in our Agreement, StrategyCorp was to complete the following tasks:

Scope Element	Status
Using the RFI results, prepare a formal RFP document ready for release	<ul style="list-style-type: none">• First draft of RFP completed in November, 2019• Full draft is complete subject to additions with respect to sustainability requirements and zoning information• Researched recent design-build RFPs to assess best practices for similar RFPs• Drafting and adjusting Town of Blue Mountain template material for the RFP• Drafting construction requirements and scoring approach for the RFP• In camera briefing for the BMAHC Board• Supporting new Executive Director Onboarding: Developed summary memorandum to assist with the onboarding of the new Executive Director and bring her



Scope Element	Status
	up to speed on procurement planning. <ul style="list-style-type: none"> • Ongoing Editing of RFP Document and Verbal Advice. With delay in issuance, there has been ongoing revisions and feedback on the RFP document. • Amendment of Scoring Approach for RFP: Analysis and advice on the scoring methodology to be used in the RFP.
Prepare communications plan regarding RFP release	<ul style="list-style-type: none"> • Completed.
Launch, monitor and, manage the RFP process	<ul style="list-style-type: none"> • RFP not issued
Assist with successful candidate selection; and	<ul style="list-style-type: none"> • BMAHC looking to proceed with an RFQ-RFP process
Work with the BMAHC and successful proponents to develop community consultation and zoning plans to ensure projects can go forward.	

A full RFP is drafted subject to further revisions as required by the BMAHC and is what was substantively achieved for the \$30,000 invoiced at the end of December, 2019.

In preparing the RFP, StrategyCorp has undertaken additional work beyond the scope of the original Agreement and has been providing ongoing strategic procurement advice to the Board and management of BMAHC, including:

- **Change in Procurement Approach:** Evaluation of procurement options (RFP, RFQ-RFP) and presentation to the Board with recommendation to pursue RFQ-RFP approach.
- **Development of Pitch Deck to Housing Developers:** Prepared PowerPoint presentation and script to potential housing developers.
- **Interim Land Report (Additional Step during RFI Process):** SCI was requested to produce an Interim Report due to heightened community concern about two of the sites as well as the addition of the Foodland site:



- This report outlined the challenges with developments on two greenfield sites and recommended that they be removed from further consideration as part of the RFI and any forthcoming RFP process
- The report also recommended inclusion of the recently acquired Foodland site as part of the RFI process
- **Consideration of Additional Parcels for Development:** Addition of 3 sites for consultation.
 - SCI's Letter of Engagement (signed on March 19, 2019) committed to 2 land parcels for consultation.
 - SCI provided land descriptions, drafted a public survey, synthesized and analyzed consultation input and prepared analysis for 3 additional sites.
 - SCI also undertook additional market soundings and summarized the feedback on the 3 additional parcels.
- **Op-Ed on Attainable Housing.** Drafted Op-Ed for Chair and facilitated its placement in Toronto Star.
- **Additional Market Soundings for RFI:** SCI also undertook an additional three market sounding interviews to supplement developer feedback because of the low response rate to the formal RFI process.
- **Advice and Support for BMAHC's Engagement with Ontario Government.** Support to the Chair in identifying and preparing for meetings with key provincial ministers and ministerial/ministry staff– Minister Clark, Minister Walker, Minister McLeod, Minister Phillips, and Minister Fedeli.

The incremental cost (over and above the \$100,000 budget set out in the Agreement) of providing the above noted additional scope items are enumerated in the following table which sets out the level of effort by StrategyCorp resource at their hourly rate.



	Loreto	Cautillo	Teefy	Hushion	Luis	Lang Weir	Sajecki	Skinner	Kayler	Total
	\$550	\$395	\$395	\$295	\$295	\$295	\$395	\$125	\$125	
Change in Procurement Approach	2	3	4							\$3,865.00
Development of Pitch Deck to Housing Developers		1	2			5				\$2,660.00
Interim Land Report (Additional Step during RFI Process)		1	2	3			2			\$2,860.00
Consideration of Additional Parcels for Development		1	3	5						\$3,055.00
Additional Market Soundings for RFI			3					5		\$1,810.00
Advice and Support for BMAHC's Engagement with Ontario Government and Toronto Star Op-Ed	1		8		1.5				14	\$5,902.50
Total Effort	3	6	22	8	1.5	5	2	5	14	66.5
Total Budget	\$1,650	\$2,370	\$8,690	\$2,360	\$443	\$1,475	\$790	\$625	\$1,750	\$20,153

At StrategyCorp, we pride ourselves on the service quality and effort we provide to our clients. The additional scope that was undertaken was all necessary to get BMAHC to this point in its housing development activities and will contribute to a successful procurement process. All this additional work also had concrete deliverables that were provided to BMAHC.