



**Request for Proposals for  
“Development and Delivery of Beginning Farmer Workshops”**

**Request Date: April 16, 2018**

**Deadline: May 23, 2018, 12:00pm EST**

*This is a Request for Proposals only. AMI is not obligated to accept any proposal or to proceed further, and may, at their sole discretion, elect not to accept any proposal for any reason.*

# **Request for Proposals for “Development and Piloting of Beginning Farmer Workshops”**

## **PART 1 - INTRODUCTION**

### **Purpose**

The purpose of this Request for Proposals (RFP) is to solicit services to adapt and develop the curriculum for new entrants to farming workshops based on our recently launched online business planning tool based on the same theme. The purpose of the workshop is to help new entrants to farming establish their launch plan for entering into an existing farm, or endeavoring into their own operation. We anticipate the workshop will be one day in length and that AMI will be a partner in the creation and delivery of this workshop on an ongoing basis.

### **Timeline**

Prospective proponents are encouraged to submit a proposal that accomplishes the objectives and meets the criteria outlined below **by 12:00 p.m. EDT on May 23, 2018**. The successful proposal will be approved at the discretion of the Agri-food Management Institute and is contingent upon funding.

All final materials and reporting must be completed by no later than January 15<sup>th</sup>, 2019.

### **Organization Information**

A key goal of AMI is to be a leader in the delivery of innovative and collaborative approaches to improve business management and leadership practices of agri-food business owners, operators and executives.

The AMI mission is to increase understanding and adoption of business management best practices by stimulating ideas and leading projects, which enable Ontario agri-food and agri-based processors and producers to meet their business goals.

More information regarding the AMI can be found at [www.TakeANewApproach.ca](http://www.TakeANewApproach.ca).

### **Contact Information**

Inquiries are welcomed. All questions must be provided in writing and responses will be shared with all proponents. Questions concerning this request for proposals, as well as proposals themselves should be directed to:

Agri-food Management Institute  
Ashley Honsberger, Executive Director  
100 Stone Road W, Unit 303, Guelph, Ontario, N1G 5L3  
P: 519-822-6618  
E: [ashley@takeanewapproach.ca](mailto:ashley@takeanewapproach.ca)

## **Background**

The Agri-food Management Institute (AMI) promotes new ways of thinking about agribusiness management and aims to increase awareness, understanding and adoption of beneficial business management practices by Ontario agri-food and agri-based producers and processors.

AMI develops business management tools, information, resources, and training for agri-food and agri-based producers, processors, and their business advisors. AMI also creates linkages to existing resources and conducts research to be shared with the industry.

The Agri-Food Management Institute (AMI) was incorporated as an independent not-for-profit in 2009 and is funded in part under the Canadian Agricultural Partnership (the Partnership). It is led by a Board of Directors with diverse backgrounds and experience in primary agriculture, agriculture business, and agri-food processing.

The key goal of AMI is to be a leader in the delivery of innovative and collaborative approaches to improve business management and leadership practices of agri-food business owners, operators and executives, through on-line tools, training programs and workshops.

Our outlook and approach is to be collaborative with existing groups and organizations and leverage existing materials to deliver on continuous program improvements. Our approach also recognizes the complexity of agri-food businesses, and strives to integrate resources into existing platforms so that the user experience is effective in helping them achieve their goals.

## **PART 2 THE DELIVERABLES**

### **Project Description and Objectives**

AMI is seeking a partner to develop and pilot a 1 day workshop for new entrants to farming. The intent of this workshop is to help new entrants or those who have recently begun farming to focus on their farm financials, opportunities for mentorship, on farm diversification strategies and more. By the end of the 1 day workshop participants will have foundational knowledge on all aspects of running the farm business, and will have begun establishing their farm launch plan.

The intended outcome to this workshop is in the short-term new farmers spend time preparing a new farm launch plan and learn various BMPs for running a farm business including new business models and varied revenue streams based on value-add. Medium term the plan is executed successfully based on sound financial knowledge and whole enterprise analysis. Long-term new entrants to farming begin farming on their own operation, number of farm businesses in Ontario positively impacted.

### **Other Considerations**

The ideal proponent will:

- Have existing experience working in the agri-food sector with detailed knowledge of farm businesses with on farm and value-add product creation

- Have a robust understanding and appreciation for business management in the Ontario agri-food context and in particular training or knowledge requirements.
- Be innovative and collaborative in approach and presentation, and complement AMI's brand.
- Demonstrate they are motivated to improve business management practices within the agricultural sector.

During the timeline of the proposal, the successful proponent must provide monthly update reports to AMI regarding the project.

## **PART 3 OVERALL SCOPE & APPLICANT SELECTION**

### **Scope**

The primary intent of the project is to adapt and pilot existing content to help new entrants to farming establish a new farm launch plan. Existing new entrants will also find this workshop valuable as it will walk participants through the foundations of financial management and more.

This project entails adapting existing content into a 1 day workshop (creation of handouts, power point presentations, collating videos, etc.), piloting the workshop 2-3 times, organizing recruitment using AMI communications channels, and managing registration and other logistics to create a positive and effective learning environment. Consulting with existing farm groups and organisations will be a key to success for this project.

We anticipate directly recruiting and promoting the event in summer and fall through print and online communications, as well as direct recruitment meetings with commodity groups or input supply companies with a track record of hosting large events. We hope to run 2-3 sessions starting in early fall, and collect ongoing participant feedback through exit surveys.

The maximum budget for this project is \$40,000 inclusive of all materials, final reporting and HST.

The project must be kept within manageable boundaries that are financially sound (return on investment) for AMI while keeping the information gathered useful and applied for the user.

### **Qualifications of Applicant**

The ideal applicant for this project will have extensive knowledge and experience in agri-food business management. Specifically, the applicant will at a minimum possess a(n):

- Extensive knowledge and experience in the Ontario agri-food sector (primary producers)
- Ability to prepare case studies and collect testimonials from the Ontario agri-food sector
- Ability to manage the project within the timelines and within budgetary allocations
- Strong, accessible, collaborative team approach to deliver the required project outcomes
- Capability to estimate, to manage the project and to provide accurate work plan and budget reports in a timely manner

### **Eligibility**

### **Eligible Proponents**

Must be incorporated in Canada.

### **Eligible Expenses**

Expenditures that are eligible include, but are not limited to:

- Consultant/professional costs to conduct and report on the progress;
- Travel and accommodation costs where necessary.

### **Ineligible Expenses**

Expenditures that are not eligible include, but are not limited to:

- Costs incurred prior to the approved project start date including costs associated with preparing and submitting the project application; and
- Capital costs such as the construction of buildings, or the acquisition of land and/or equipment.
- Costs associated with hospitality, excessive travel, alcohol and gifts.

### **Selection Method**

Each proponent must provide in their proposal

1. A brief description of the proponent as it relates to the requested deliverables, and the proponent's other recommended deliverables, if any
2. A description of the projects the proponent has previously or is currently delivering with an emphasis on experience relative to the deliverables
3. The roles and responsibilities of the proponent and any collaborative partners who will be involved in providing the deliverables, together with their identities and relevant respective expertise
4. Knowledge, skills and expertise in the following areas:
  - a) Familiarity with industry stakeholders
  - b) Familiarity with local food supply chain
  - c) Communications and reporting
5. A description of how the proponent will provide the deliverables, including a detailed budget and work plan itemized by recommended activity.
6. A description of the proposed methodology and processes as it relates to the deliverables, and the proponent's other recommended deliverables, if any

### **Proposal Submission**

All proposals will be reviewed by an internal review committee within three weeks of the submission deadline. The top three proposals will be evaluated for strengths and weaknesses and follow-up details will be acquired from associated proponents.

- Proposals may be delivered by hand, courier/mail or by email (pdf format only).
- Proposals must be received **by 12:00 p.m. EDT on May 20<sup>th</sup>, 2018**
- All delivered submissions must include an electronic copy on a USB key or by email (pdf format only).
- Proposals received unsigned or after the RFP's closing date and time will be rejected.

- Changes to proposal(s) may be requested by the proponent or AMI, but must be agreed to by both parties

## Points System Evaluation

### Step 1: Score Card

The following score card or points system can be used to determine the weighting of certain criteria that will be used by the selection committee.

<b>Evaluation Criteria</b>	<b>Weighting</b>
Robust experience creating reports and support strategies	3
Specificity of approach	2
Ability to liaise with the industry and garner their input and feedback	2
Extensive experience with Ontario agri-food producers	2
Track record of success delivering reports and long term strategic recommendations	3
Creativity and innovativeness of proposal	2
Completion of proposal relative to requested deliverables	3
Availability for entire duration of project	2
Availability for in-person meetings and presentations in Ontario	1
<b>Total Score</b>	
<b>Maximum Score</b>	<b>20</b>

### Key Evaluation score

- 0 = does not meet requirements
- 1 = partially meets requirements
- 2 = meets requirements
- 3 = exceeds requirements

### Step 2: Value for Project

The following calculation will be used to determine the value of the project in terms of the proposed cost per point awarded:

$$\text{Value of project (\$/point)} = \frac{\text{Proposed cost of project (\$)}}{\text{Total score awarded (points)}}$$

Other Factors to Consider (in addition to the deliverables meeting the outlined requirements):

- Keenness and enthusiasm of the proponent to be involved with the organizations
- The professionalism exhibited in all aspects by the proponent
- Quality standards that the proponent has achieved
- The ability to meet timelines and deadlines, including timely progress meetings, presentations and reports
- The ability to meet for regular updates, guidance, de-briefs, etc. in a mutually beneficial set-up
- Whether the proponent has the resources to handle project delivery in-house
- Resume for any sub-contractors that will be working on this project along with signed NDA(s)
- Breakdown of budgeted payment and hourly rate for each consultant or administration staff assigned to the project
- Per diem rates for any work required, which would be considered over-and-above the agreed contract
- Additional costs for disbursements
- Costs and payment terms offered and whether they are negotiable
- Vendor's references and current clients in the agricultural sector

**PROJECT CERTIFICATION, CONFIDENTIALITY AGREEMENT & CONFLICT OF INTEREST DECLARATION**

**CONFIDENTIALITY**

Protection of privacy and release of information:

- a) Unless otherwise specifically agreed to between the applicant and AMI, all proposals and supporting material will be used by AMI solely for the purpose of evaluating the proposal and may be disclosed by AMI to third party references, partners, or AMI advisors as part of the approval process.
- b) All proposals and supporting material shall become the property of AMI and AMI shall not be required to return the proposal or any supporting material.

**CONFLICT OF INTEREST DECLARATION**

The Proponent, by submitting the Proposal, warrants that to its best knowledge and belief no actual or potential Conflict of Interest exists with respect to the submission of the Proposal or performance of the contemplated Agreement other than those disclosed in the Form of Offer. Where AMI discovers a Proponent's failure to disclose all actual or potential Conflicts of Interest, the Purchaser may disqualify the Proponent or terminate any Agreement awarded to that Proponent pursuant to this Proposal process.

**CERTIFICATION**

By submitting this proposal to AMI, the applicant acknowledges and agrees that:

- a) AMI may reject any proposal for any reason it considers proper, may impose terms and conditions to its approval, and its decisions are final and binding on the applicants without any right of appeal. AMI may return the documentation of any unsuccessful applicants.
- b) AMI in accepting the proposal undertakes to consider the proposal for approval but assumes no other obligation or risk and the approval or denial of a proposal raises no liability to AMI or any cause of action to any third party placing reliance on the same.
- c) The applicant agrees to enter a detailed project contract with AMI incorporating any terms and conditions imposed by AMI as part of its approval to be signed prior to any advance of funds to the applicant by AMI.
- d) The applicant agrees to provide information necessary to conduct a credit check and to determine the financial track record of the applicant.

The applicant hereby certifies to AMI that the proposal and supporting documentation are true and complete in all respects. The signing authority hereby has read and understood the Confidentiality and Certification clauses:

**Project Leader:**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

<p><b>PROJECT COST PROPOSAL</b></p> <p>\$ _____</p>
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