



## REQUEST FOR PROPOSALS:

### Post Collection Guidance & Asset Valuation Tools Workshops

**Posted:** Friday, September 24, 2021

**Inquiry deadline:** Thursday, September 30, 2021, no later than 4:00 p.m. EST

**Bid deadline:** Friday, October 8, 2021, no later than 12:00 p.m. EST (noon)



**Request for Tender:** Post Collection Guidance & Asset Valuation Tools Workshops

**Issued by:** The Continuous Improvement Fund (CIF)

**Release Date:** Friday, September 24, 2021

**Inquiries:** Thursday, September 30, 2021, no later than 4:00 p.m. EST)

Inquiries can be made, in writing, to Jessica Landry at [jlandry@thecif.ca](mailto:jlandry@thecif.ca).

Responses to all inquiries will be posted to the [CIF website](#) the following day (Friday, October 1, 2021).

**Closing Date & Time:** Friday, October 8, 2021, no later than 12:00 p.m. EST (noon)

Bids are to be submitted electronically, via email to Jessica Landry at [jlandry@thecif.ca](mailto:jlandry@thecif.ca).

Failure to submit a Proposal by this date and time will result in it being disqualified. Once received, Proposals will be acknowledged by email.

## Background

On June 3, 2021, the Ontario government announced their new [Blue Box regulation](#) making producers responsible for Blue Box materials under the Resource Recovery and Circular Economy Act, 2016. At the same time, they finalized amendments to Regulation 101/94: Recycling and Composting of Municipal Waste to sunset municipal obligations to run Blue Box systems after transition to Full Producer Responsibility (FPR).

In early 2021, to support municipal and First Nations groups in planning for the changes ahead, the CIF partnered with AMO's Municipal Resource Recovery and Research Collaborative (M3RC) to develop and launch a Transition Working Group (TWG). The objective of this group is to develop a range of resources, tools, templates, and training/workshop packages that will help prepare all Ontario municipalities and First Nations communities to transition their Blue Box Programs to the new FPR framework.

The TWG work is divided into five subcommittees and is overseen by a steering group. The work proposed in this Request for Proposal (RFP) stems from the Post Collections subcommittee.



Figure 1: TWG Committee Structure

### *Post Collections*

With producers beginning to assume responsibility for the cost and operation of the residential Blue Box Program in 2023, municipal and First Nations communities are preparing to transition out of their current roles. Since the Blue Box Program's inception, municipalities have invested millions of dollars into municipally owned collection and post collection assets to deliver Blue Box services to over 5 million households in Ontario every year. With less than two-years before transition begins, municipalities must decide on what to do with their assets and infrastructure (e.g., land, buildings, and equipment).

In June 2021, the TWG's Post Collections subcommittee hired subject matter experts to develop guidance for municipal and First Nations communities that will help them prepare and implement plans that address the needs of current programming through to its transition to the producers, as well as post collection implications resulting from the regulatory changes.

In September 2021, the subcommittee approved decision guidance (guide) and an asset valuation tool (tool) resulting from this work. The CIF, on behalf of the subcommittee, is now implementing an outreach strategy to encourage province-wide uptake and local application of these new resources. The CIF will provide the guide and tool associated with this RFP upon request. Proponents requesting access to the guide and tool will be required to sign a non-disclosure agreement acknowledging the resources are the intellectual property of the CIF. Any use of the resources beyond the preparation of a bid in response to this RFP is prohibited.

## Scope of Work

The CIF is seeking subject matter experts to develop hands-on workshops where participants receive instruction and support in applying the advice in the guide and in using the tool. Proponents bidding on this work will also be expected to refine the resources (i.e., guide and tool) and develop case studies based on the lessons learned during the workshops where municipalities and First Nations communities are applying the decision guidance and using the valuation tool. The work in this RFP is broken into seven broad components, please note two aspects of the work are optional:

1. Workshop plans
2. Workshop content development
3. Workshop delivery & follow ups
  - a. Additional workshop deliveries, *optional*
4. Resource improvements (i.e., guide & tool)
5. Case studies, *optional*
6. TWG Post Collection subcommittee meeting updates

Recognizing there is a difference in the challenges and complexity of the post collection decisions facing the operators of depots, transfer stations and Material Recovery Facilities (MRFs), the successful proponent will develop three separate workshops. While the content of the three sessions will be largely the same, separating participants into groups facing similar issues will allow each workshop to focus discussion on items that are relevant to all those in attendance. It will also help ensure there is sufficient time to answer all questions and explore

ideas specific to the group. Finally, it will allow participants to develop a network of contacts who are facing similar decisions.

The Municipal and First Nations participants' interest level in participating in the workshops will also have bearing on how the session are grouped. Subject to participant uptake, the CIF will do its best to ensure sessions and/or participants attending the same session, will be grouped based on type of asset(s) (e.g., depots, transfer stations, and material recovery facilities). As such, the content must be flexible enough to allow a range of participants to be combined into an individual workshop while still ensuring their post collection planning needs are met.

It is suggested the workshop grouping be: 1) depots, 2) transfer stations and small MRFs, and 3) large MRFs. The successful proponent will be welcome to suggest different groupings based on their assessment of the post collection assets, needs and considerations of the various operators. Upon award of the work, the CIF will work with the successful proponent to finalize workshop grouping.

## Budget

A budget of \$15,000 to \$25,000 is *anticipated* to develop three workshops. This does not include the cost of additional, subsequent workshops.

## Bidders

Interested bidders, individually or through collaborative partnering, will have working knowledge of, and experience with:

- [O. Reg 391/21: Blue Box](#) and the resulting post collection transition challenges and issues facing municipalities and First Nations communities
- Municipal and First Nations residential Blue Box operations<sup>1</sup>, specifically as it relates to post collection activities (i.e., consolidation and sortation of targeted commodities)
- Recycling post collection (i.e., transfer station, MRF, depot<sup>2</sup>) bidding and contract negotiation
- Valuation and sale or lease of post collection assets related to transfer stations, MRFs & the post collection functions of depots<sup>2</sup>
- Legal aspects of the sale, lease or sharing of municipal assets
- Implications of municipal waste management waste sheds (e.g., determination of whether multi municipal collaboration is needed to secure a service contract with a Producer Responsibility Organization (PRO))

- Change management planning, specifically with the use of decision-trees, and decision-tree guidance
- Workshop development and delivery

Notes:

1. Preference for Ontario based Blue Box experience.
2. Post collection depot activity refers only to those depot functions related to sorting, consolidation, and shipping of collected product.

## Workshop Plans

### *Bid Submission*

For their bid submission, proponents are asked to provide the number of hours and their price per hour to develop a workshop plan for each of the three workshops.

### *Workshop Plan Requirements*

The workshops should culminate in the development and refinement of locally based post collection plans and recommendations for the participant's senior leadership and, or councils.

Working from the resources provided by the CIF (guide and tool), the successful proponent will develop workshop plans. The workshop plans will provide a breakdown of the learning objectives:

- what will participants learn (which aspects of the guide and tool will be focussed on), and
- how will they learn it (e.g., worksheets, group activity)

It is expected each of the three workshop plans will be similar, with the only difference being their focus (e.g., depot, transfer station/small MRF, large MRF). Bidders should budget based on three parallel workshop plans. As noted, exact grouping will be established with the successful proponent.

### *Pre-Course Preparation*

To achieve the workshop objective (i.e., develop locally based plans and recommendations), participants will require relevant information such as their program's operational and financial data. Bidders should budget time to prepare pre course assignment instructions for participants explaining what data is needed and who (which departments) to work with to secure the information requested.

### *Duration*

It is anticipated each workshop will be a total of 8-hours in length. The workshop content will be broken into units and delivered in parts. Each online unit will run between 90 minutes to two hours in length and will be delivered over multiple days.

### *Participants*

This workshop will be exclusively for municipal and First Nations staff. It is expected that each session will have 20 participants. Municipalities and First Nations communities will be permitted to send up to two staff to a session (e.g., one operations staff, and one finance staff).

## Workshop Content Development

### *Bid Submission*

For their bid submission, proponents are asked to provide the number of hours and their price per hour to develop the workshop content (e.g., PowerPoint slides and activity/worksheets).

It is expected the content for each of the three workshops/training sessions will be similar, with the only difference being their focus (e.g., depot, transfer station/small MRF, large MRF).

### *CIF Resources & Staff Support*

Once the slide content has been set (i.e., words on a CIF provided slide deck), the CIF will be responsible for providing slide deck support (e.g., formatting, artwork).

## Workshop Delivery & Follow up

### *Bid submission*

For their bid submission, proponents are asked to provide their price per hour to deliver the 8-hour workshop as well as to provide 10 hours of follow up support to participants after the session. Eighteen (18) hours will be assumed for each of the workshop deliveries totalling 54 hours to deliver all three.

### *Workshop, 8-hours*

CIF will only pay the successful proponent's hourly rate for time spent delivering the workshop on the day of the event and for the time spent on participant follow ups, up to the 10-hour limit. Proponents are to include the cost for workshop preparation under the content development section.

### *Participants follow up*

Proponents will be expected to follow up with participants by phone and, or email after the session to answer questions and provide feedback. A half hour (30 minutes) per participant/municipality has been allotted to this activity.

### *Scheduling*

CIF would like to begin delivering the workshops as soon as possible. It is anticipated that once the work is awarded, the workshop plan and content can be developed within 3-weeks given that the resources they are based on (guide, tool) have already been developed and approved by the TWG Post Collections subcommittee. Dates for workshops will be selected in consultation with the successful proponent, with the first delivery in mid-November if possible.

### *CIF Resources & Staff Support*

CIF staff will be responsible for developing and sending the workshop invitations; participant registration and pre course communications and post course support as needed. CIF will also be responsible for providing the screen sharing platform, which will be Zoom, and assistance on the workshop delivery days (e.g., letting registrants into the platform, monitoring the participant Q&A and chat functions, breakout rooms).

### *Additional Workshop Deliveries, optional*

Should there be sufficient demand for subsequent deliveries, CIF staff will work with the successful proponent to find additional dates. It is expected that for each subsequent delivery the CIF will pay for 18 hours of the successful proponent's time under a separate purchase order.

## Resource Improvements

### *Bid submission*

For their bid submission, proponents are asked to provide their price per hour to recommend and carry out revisions to the Post Collections Guidance Document and Asset Valuation Tool.

### *Recommendations*

After facilitating each of the three workshops, the successful proponent will be asked for recommendations on how to improve the resources (guide and tool). The recommendations are to address errors and omissions. One hour has been allotted for each workshop (3 hours total) to develop a memo summarizing the recommendations based on insights gained from each workshop and participant follow up experience.



## Case Studies, optional

### *Bid Submission*

For their bid submission, proponents are asked to provide the number of hours and their price per hour to develop case studies for each of the three groups (depot, transfer station/small MRF, large MRF).

### *Case Studies*

After facilitating each of the three workshops, it is expected the successful proponent will be able to write a case study for each group. It is anticipated that they will have gained insights into the types of challenges and typical recommendations for each scenario (depots, transfer station/small MRF, large MRF). The case studies would reflect the general theme and trends observed in the workshop, without any specific details or attributions of any one group. The purpose of the case studies would be to serve as examples of plans and recommendations for post collection planning for each scenario. The case studies would be given to municipalities and First Nations groups who did not attend the training, preferring to work independently with the resources.

CIF staff will work with the successful proponent throughout the process to determine the viability of the case studies and will submit in writing to the successful proponent their intention to option this part of the scope of work, should they choose to proceed with it. The proponent will be paid for their time spent consulting with the CIF on this matter at the hourly rate provided. The consultation time will be drawn from the total time allotted to this part of the work (consultation time is not in addition to the hour quoted for this part of the work).

## Subcommittee Meeting Updates

### *Bid Submission*

For their bid submission, proponents are asked to provide their price per hour to attend meetings as requested.

### *TWG Post Collections Subcommittee Meetings*

The successful proponent will be required to meet with the TWG Post Collection subcommittee upon request. Meetings are scheduled every other Tuesday at 11 a.m. and take place on the following dates Oct. 19, Nov. 2, 16, and 30. Up to 1 hour of the successful proponent's time will be needed per meeting, and they will only be required to speak anecdotally to the progress they have made with the workshop. The successful proponent will only bill for meetings attended.

## Timing & Deliverables

Preferred project timing and deliverables are in the table. Final due dates and timelines will be negotiated with the successful proponents. Preference will be given to groups that can begin right away.

Timeline	Deliverable	Description
Draft Due: Fri. Oct 22, 2021  Final Due: Wed. Oct 27, 2021	Workshop Plans	A breakdown of the learning objective for each of the three groups: <ul style="list-style-type: none"> <li>• what will participants learn (which aspects of the guide and tool will be focussed on), and</li> <li>• how will they learn it (e.g., worksheets, group activity)</li> </ul>
Draft Due: Wed. Nov 03, 2021  Final Due: Fri. Nov 05, 2021	Workshop Content Development	Content preparation for each of the three groups: <ul style="list-style-type: none"> <li>• Pre course assignment and support</li> <li>• Working session slides, activities/worksheets</li> </ul> The CIF will be responsible for providing slide deck support (e.g., formatting, artwork). <ul style="list-style-type: none"> <li>• Nov 8 to 12 is reserved for this task</li> </ul>
Workshops (3): Mon. Nov 15, 2021 - Fri. Nov 26, 2021	Workshop Deliveries & Follow ups  Additional Workshop Deliveries, optional	<ul style="list-style-type: none"> <li>• Three workshops one for each set of groups</li> <li>• 10, 30-minute post workshop calls/email exchanges</li> </ul>
Memos Due: 48 hours post workshop  Improvements Due: TBD	Resource Improvements: <ul style="list-style-type: none"> <li>• Recommendations</li> <li>• implement recommendations</li> </ul>	Post Collection resource improvements to: <ul style="list-style-type: none"> <li>• Guidance document, and</li> <li>• Asset Valuation Tool</li> </ul>
Thu. Dec 09, 2021	Case Studies, <i>optional</i> Project Completion	<ul style="list-style-type: none"> <li>• Ensure all materials are submitted to the CIF.</li> <li>• Optional case study development, three, one for each group.</li> <li>• Optional subsequent deliveries, based on sufficient demand and successful proponent availability</li> </ul>

### Notes:

1. Additional Workshop Deliveries will be optioned in consultation with the successful proponent.
2. Travel will not be required for this project.

## Instructions

Proponents interested in responding to the RFP are responsible for reviewing these instructions in their entirety, prior to completing each section. If any of the information requested is already on file with the CIF, please indicate that on the appropriate section of the form.

- 1) Complete **General Information** section within the **RFP Submission Requirements** (word document) by providing the company name and website, as well as the Key Contact Person(s) details for your company. All communications regarding submissions and/or work assigned will be provided through the Key Contact Person(s) identified. If you need to change the Key Contact Person(s) at any time after submitting, please contact [jlandry@thecif.ca](mailto:jlandry@thecif.ca).
- 2) Complete the **Team Member Details** section within the **RFP Submission Requirements** (word document) for team members to demonstrate your company has the knowledge and experience required to provide the required service.
- 3) Complete the **Relevant Project Experience** section within the **RFP Submission Requirements** that describes your team's experience in conducting similar work to complete the project.
- 4) Respond to the questions about you (and your team's) **Availability** within the **RFP Submission Requirements** to let us know how soon the work can begin, and whether you can work within the preferred timeline detailed.
- 5) Complete the **References** section within the **RFP Submission Requirements**. References provided are expected to speak to you (and your team's) demonstrated capability to consistently meet delivery deadlines.
- 6) Complete the **Pricing Information** section within the **RFP Submission Requirements**. Please save a PDF copy of the completed Excel worksheet and include both the completed excel version AND the PDF copy with your RFP submission.
- 7) A comprehensive list of questions asked, and answers given will be posted to CIF's [website](#) Friday, October 1, 2021. Only inquiries received on or before the deadline will be addressed.
- 8) Bids must be received by no later than 12:00 p.m. EST (noon), Wednesday, October 6, 2021.

## Submissions Evaluation Criteria

The table below presents the distribution of the evaluation scoring.

Criteria	Scoring Weight
<b>Team Member's Experience and Knowledge</b> Each team member has demonstrated recency and relevancy as well as depth and breadth of experience associated with the role assigned.	40%
<b>Team Capacity and Redundancy</b> Demonstrated evidence of the company's capacity to complete the project (i.e., sufficient staffing redundancy to prevent lost time in the event of staffing changes).	10%
<b>Availability and Ability to Meet Deadlines</b> Preference will be given to Bidders ready for an immediate start and with a demonstrated capability to consistently meet delivery deadlines. CIF reserves the right to include penalties for missed deadlines which are within the control of the vendor.	25%
<b>Price and Value</b>	25%
<b>Total</b>	<b>100%</b>

**Please complete the accompanying RFP Submission Forms.**