



STRATEGIC PLANNING 2020

Request for Proposals

Issued: JULY 7, 2020

RFP Submission Deadline:

JULY 31, 2020, 5:00 pm EDT

RFP Contact:

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PURPOSE

OCASI is seeking proposals from qualified individual consultants or consulting firms to assist in the development of a three-year comprehensive strategic plan that will identify strategies and objectives for advancing the organization's values, mission, services and vision for the future; will develop ways and tactics to achieve them; and will provide tools for monitoring and evaluation through implementation.

ABOUT THE ORGANIZATION

The Ontario Council of Agencies Serving Immigrants (OCASI) is the provincial umbrella for immigrant and refugee serving organizations in Ontario. OCASI is a registered charity governed by a volunteer Board of Directors. Formed in 1978 to act as the collective voice for immigrant and refugee serving agencies, OCASI's membership is comprised of more than 200 autonomous community-based organizations across Ontario.

OCASI's mission is to achieve equality, access and full participation for immigrants and refugees in every aspect of Canadian life.

SCOPE

The consultant shall, at minimum, accomplish the following:

Planning Activity and Final Deliverable

1. Design and execute a strategic visioning and comprehensive planning process including consultation with OCASI membership, Board of Directors, leadership team, staff, OCASI membership and other key stakeholders (strategic partners, social enterprise clients, funders, etc)
2. Develop an actionable three-year strategic plan, including the following:
 - a. OCASI vision, mission and values
 - b. OCASI strategic priorities and goals
 - c. Annual objectives and resources needed to achieve them
 - d. Analysis of internal and external factors that can affect OCASI's goals and objectives
 - e. Communication, monitoring and evaluation
3. Develop recommendations for implementation, including the alignment of the strategy with the following suggested categories of resources:
 - a. Human resources – individual skills, competencies

- b. Financial resources – funding, monetary assets, revenue generating enterprises
- c. Strategic resources – brand, reputation, partnerships
- d. Organisational resources – culture, systems, policies, procedures
- e. Physical resources – physical space, equipment, facilities
- f. Program resources – content, technology, intellectual property, expertise

Consultation and Research

It is anticipated that these tasks will be accomplished through a combination of activities, such as:

- Focus groups, interviews, one-on-one calls, and/or any other method that will be useful in receiving stakeholder and community input
- Facilitated group meetings with Board members to create consensus regarding a strategic plan (including goals, objectives, strategies, and tactics)
- Review and present available related data and stakeholder strategic plans as well as any relevant research and best practices.

The consultant will have knowledge and experience in:

- Non-profit trends and current issues
- Research methodology
- Public consultation (online and in person)
- Statistical analysis
- Presentations
- Working with multiple stakeholders
- Knowledge and understanding of immigrant and refugee sector issues
- Knowledge about the Council
- Understanding of equity and access issues as they pertain to immigrants, refugees, newcomers and racialized communities
- Demonstrated ability to integrate in-depth knowledge of equity, access, and anti-racism into all aspects of the work

ANTICIPATED PROCESS FOR STRATEGIC PLAN DEVELOPMENT

OCASI seeks the consultant’s recommendations regarding the best process to develop an actionable strategic plan to be conducted in two stages.

Stage 1. Vision and key Strategic Direction and goals

This stage includes consensus building among the key informants to:

- a. Confirm that the current strategic vision and mission:
 - Is still relevant
 - Is clearly stated
 - Is compelling
 - Is timely

- Describes a clear and present need
 - Motivates people to act
 - Is a worthwhile challenge
 - Is audacious
- b. Identify key strategic directions & goals after consultation with the membership, Board of Directors, staff and key community partners, and stakeholders

This stage should produce the substantive documentation and solutions needed for informing the strategic planning process.

Stage 2. Write the strategic plan

Utilizing information from the first stage, this stage will include the development of an actionable strategic plan that will serve as the overall blueprint for the Council's action plans for the next three years. This plan should include:

- An Executive Summary of the main findings, including key recommendations numbered and priority ranked
- A comprehensive, detailed plan that identifies:
 - Vision & Mission
 - Key Strategic Directions
 - Goals
 - Objectives
 - Strategies
 - Tactics
 - Stakeholders and their roles
 - Outcomes
 - Measures of success

Supplementary information should include:

- Initial communications strategies (What are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)
- Key values that incorporates anti-racist lens process to assist direction and decision making
- A detailed strategic planning process model complete with key milestones and timelines
- Performance measurement tools during the implementation phase
- Strategic areas of focus and service priorities for the next three years
- Services and programs (both current and new) that will support goals, including potential external partnerships
- A review of the current status of the Council's organization, including existing plans, policies, financial status, long-term goals and other relevant, related research deemed necessary
- An analysis of the external environment that will impact the organisation in the near future

PROPOSAL REQUIREMENTS

Proposals must include the following:

General Information

The consultant understands that the scope of work requested may be conducted by a single consultant, a consultant firm, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number and email address for each person engaged in scope activities.

Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the lead person for the purposes of this RFP and the engagement, and how much time the lead person will dedicate to the project.

Consultant Qualifications

To accomplish the scope requested, the consultant will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Knowledge and understanding of immigrant and refugee sector issues
- Knowledge of strengths-based planning approaches
- Experience at creating a safe environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process
- Experience in conducting virtual meetings and consultations

Work Plan

The proposal should contain suggested categories and description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:

- The specific activities to be conducted at each stage
- A timeline for the activities at each stage
- Milestones and deliverables tied to those activities
- A detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables. Overall budget should not exceed twenty thousand dollars (\$20,000)

References

The proposal should include three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address.

Previous Work Product

The proposal should include at least two examples of written works similar to the scope of work requested within this RFP (e.g., strategic plan).

PROPOSAL REVIEW CRITERIA

The proposals will be reviewed and evaluated based on the following

1. Qualifications (30 points)

- The consultant has the qualifications needed to successfully complete the scope of work
- The consultant has prior experience working on similar projects
- The Consultant has extensive working knowledge of the immigrant and refugee sector issues and about Council

2. Scope of Proposal (30 points)

- The proposal demonstrates an understanding of the project objectives and desired results
- The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan
- The proposal includes an appropriate process to interact with the Board members including the entire membership as well as other stakeholders

3. Work Plan (20 points)

- The proposal adequately details project activities and milestones or deliverables associated with each stage of the scope of work
- The proposal includes a detailed timeline for each stage and the work can be completed within the project timeline

4. Budget (20 points)

- The proposal includes a detailed budget for each stage of the scope of work
- Proposed costs are reasonable and the schedule of payments corresponds appropriately with tasks, milestones or deliverables

OCASI reserves the right to ask clarifications from shortlisted consultants and will not provide feedback about unsuccessful proposals.

TIMETABLE

RFP for Strategic planning issued:	July 7, 2020, 5:00 pm EDT
Deadline for questions from consultants:	July 17, 2020, 5:00 pm EDT
Responses to questions provided:	July 22, 2020, 5:00 pm EDT
Proposal submissions due date:	July 31, 2020, 5:00 pm EDT
Award decision communicated:	August 28, 2020, 5:00 pm EDT

PROPOSAL SUBMISSION

Proposals must be submitted electronically by email addressed to Eta Woldeab, Associate Executive Director at ewoldeab@ocasi.org.

All attachments must be in PDF, WORD or EXCEL file format.