



REQUEST FOR PROPOSAL STRATEGIC PLANNING

Date of Issue: July 9, 2024

Submission Due Date: August 2, 2024

Expected Date of Award: September 3, 2024

This Request for Proposals (“RFP”) is being issued by Polycultural Immigrant and Community Services (Polycultural) to identify a qualified vendor to assist in the development of a comprehensive five-year strategic plan that includes an Implementation Plan, Balanced Scorecard and Board Training that will focus on the organization’s values, services and vision for the future.

1. Background:

Polycultural Immigrant and Community Services is an Ontario not-for-profit organization serving immigrants, refugees, seniors, youth and families and provides an array of programs and services funded by all levels of government and foundations. Established in 1993, Polycultural has served thousands of newcomers to Canada helping them make Canada their new home. With seven locations in the Greater Toronto Area (GTA) and Orangeville, Polycultural’s 250 dedicated employees serve clients in over 20 different languages with programs spanning the full spectrum of the settlement process in Canada. Its array of programs and initiatives encompasses language training, employment support, housing assistance, cultural orientation, and social integration. Moreover, Polycultural extends leadership programs for youth and initiatives tailored to combat senior isolation and foster engagement. Anchored in principles of inclusivity and empowerment, Polycultural serves as a driving force in cultivating resilient and vibrant communities, where diversity is embraced, and every individual is afforded the opportunity to thrive.

2. Scope of Services:

In March 2025, the current five-year Strategic Plan of Polycultural will reach its conclusion. Polycultural invites proposals from qualified consultants to collaborate closely with its Board and Staff in formulating a new five-year strategic plan spanning 2025-2030. The objective of this forthcoming strategic plan is to elicit an organizational strategy and approach incorporating a long-term vision reflective of prevailing social and funding landscapes, while also anticipating future challenges confronting Polycultural. The plan should articulate how Polycultural can optimally position itself to sustain its leadership role in achieving its mission of giving individuals and communities an equal opportunity to be productive members of the Canadian society.

3. Project length and budget:

The project will be expected to be completed within a timeframe of six (6) months from the start of the contract. The budget allocated is up to \$50,000 CAD.

4. Deliverables:

- Provision of expert guidance and facilitation throughout the project.
- Development of the implementation plan with a "phased in" approach to realize the goals and strategies outlined in the plan, delineating short-term (6 months to 1 year), medium-term (2-3 years), and long-term (3-5 years) objectives.
- Development of measurement indicators and Key Performance Indicators (KPIs) for assessment and reporting, employing a Balanced Scorecard methodology with Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals.
- Review of current projects and programs to ensure alignment with the organization's goals and strategic plan.
- Alignment of the strategic plan with the Harmonia (EIDAD) Framework, ensuring that all goals, objectives, and initiatives within the plan incorporate principles of equity, diversity, and inclusion.
- Formulation of detailed action plans to augment the attainment of long-term goals and strategies, addressing critical issues that may impact Polycultural's efforts, alongside allocation of resources and implementation of actions to mitigate potential adverse effects.
- Coordination of project activities, encompassing regular meetings and provision of status reports to maintain project timelines and keep stakeholders informed of progress.
- Conduct needs assessments and environmental scans.
- Propose new projects/programs/ideas for future growth of the organization based on the environmental scan results.
- Diversification of funding sources based on the environmental scan, identifying and pursuing new funding opportunities to ensure sustainable growth and reduce dependency on current funding streams.
- Incorporation of digital transformation initiatives to enhance administrative processes and improve service delivery.
- Solicitation and integration of input from key internal and external stakeholders, involving collection, assessment, and formulation of recommendations. Planning, coordination, and documentation of all meetings, including stakeholder consultation sessions.
- Integration of Artificial Intelligence (AI) into the organization's service provision.
- Preparation of comprehensive project documentation, comprising an interim report and a final report encompassing an executive summary and the strategic plan presented in a concise one-page poster format.

5. Selection Criteria:

Polycultural will employ a comprehensive set of criteria to determine the most suitable consultant. Considering the pivotal objectives delineated in this document, the assessment of proposals will be grounded on the following criteria:

- A. Demonstrated experience in conducting Strategic Planning exercises, supported by evidence of outcome-based reports and proficiency in measurement techniques.
- B. Extensive track record in executing similar projects within the not-for-profit sector; Additional consideration will be given for experience in the settlement sector.
- C. Proficiency in facilitation skills, particularly in collaborating with boards of directors, staff, and key stakeholders.
- D. Transparent and competitive fee structure.
- E. Quality and relevance of provided references.
- F. Alignment with Polycultural's organizational culture and objectives.
- G. Overall excellence in proposal quality.

It is important to note that Polycultural retains the discretion to not proceed with engagement of any consultant following this Request for Proposal (RFP) process.

6. Proposal Requirements:

In compliance with the specifications outlined below, proposals must encompass the following information, ensuring explicit reference to each section:

A. Consultant Profile:

- 1. Comprehensive background information including name, address, and a succinct history with pertinent background details, accompanied by a description of services offered.
- 2. Identification of an individual with the authority to commit the consultant, including their name, title, and contact information (if distinct from the aforementioned).

B. Experience and Qualifications:

- 1. Disclosure of the number of years of experience in providing consulting services.
- 2. Explanation of the distinguishing features that set your services apart from those of other providers.
- 3. Demonstration of relevant experience in the development of Strategic Plans within the not-for-profit sector.

C. Service Process Overview:

- 1. Articulation of the approach to delivering services tailored to, responsive to, and in alignment with the specific business needs of Polycultural.

2. Presentation of evidence pertaining to outcome-based strategic reports, elucidating measurement techniques and the methodology for planning and developing a strategic plan.
3. Elaboration of a comprehensive project plan delineating the proposed approach and methodology.

D. Fees & Pricing:

1. Submission of a fee quotation for the completion of the Strategic Plan 2025-2030, with a breakdown of fees across the various components of the scope of work.
2. Specification of the schedule and timing of billings.
3. Clear indication of any out-of-pocket disbursements or administrative fees, either incorporated into the estimated fee or separately delineated. Please be advised: Polycultural reserves the right to adjust the project scope based on budgetary constraints.

E. References:

Provision of three (3) significant and pertinent industry project references, inclusive of contact information, accompanied by a description of the scope of services rendered to each reference.

Please note: Polycultural commits to providing advanced notification prior to contacting any references provided.

7. Submission and Contacts:

Please submit your proposal electronically to Mutaz Qamhieh at mqamhieh@polycultural.org. The deadline for proposal submission is Friday, August 2, 2024 at 17:00 EST. Late proposals may not be considered.

Please direct all inquiries via email to:
Mutaz Qamhieh, Manager of Strategic Initiatives
E-mail: mqamhieh@polycultural.org