



Request for Proposal Strategic Planning Consultant

INVITATION

Applegrove Community Complex is seeking proposals from qualified and experienced individuals or teams to facilitate a strategic planning process and to prepare a 3-year strategic plan.

ABOUT APPLGROVE

Applegrove Community Complex (Applegrove) www.applegrovecc.ca is a multi-service community centre that works with community members and partners to offer programs and services for people of all ages, host meetings and events, support action on local issues and provide local job and volunteer opportunities that support a caring and vibrant community. Applegrove is both an agency of the City of Toronto and a registered non-profit and charity, and is governed by a community Board of Management and Board of Directors.

Applegrove last engaged in a strategic planning process in 2014. This plan was updated in 2017 and 2019. Applegrove is looking to have a new strategic plan approved in early fall.

PROPOSAL OVERVIEW

Applegrove is seeking a consultant for work over a 7-8 month period to lead and complete an organizational strategic planning process that will:

- a. Actively engage the agency's board, leadership, staff, participants, and key informants
- b. Use a diversity, equity and inclusion (DEI) lens
- c. Result in a Board-approved 3-year strategic plan that is clear, concise, actionable and measurable, with a framework for implementation.

SCOPE OF WORK AND KEY DELIVERABLES

Work will be conducted over six months beginning March 2023.

The Strategic Plan will redefine and represent the vision for our future to our stakeholders, articulate an updated mission for the agency, identify organizational values, and set strategic directions and priorities to guide the work of the agency.

The Strategic Plan should be informed by, and support the implementation of recommendations of our organizational Diversity, Equity and Inclusion (DEI) Audit completed in 2022. The planning process should apply a DEI lens to stakeholder engagement, information gathering and research, conceptual frameworks, evaluation approaches, and implementation strategy.

The consultant will be asked to meet key deliverables in all project phases as outlined below. The timing, number and format of activities describes the agency's intentions and is open to discussion by the consultant.

PHASE 1 - PLANNING

Work Planning – *Confirm project workplan for approval by the board.*

- Facilitate 1 session with board-staff strategic planning working group to confirm project work plan (virtual)
- Deliver work plan document
- Lead 1 discussion on strategic planning with the board (virtual or in-person)

PHASE 2 – INFORMATION GATHERING & CONSULTATION

Environmental Scan – *Gather, review and analyse relevant documents, data and information.*

- Review of current agency data and documentation, DEI audit, and other relevant organizational information
- Review of the latest available census data for our catchment area
- Provide an internal analysis using a SWOT, SOAR or other relevant format
- Provide an external analysis of our context using a PEST or other relevant format
- Deliver an environmental scan summary document

Stakeholder Consultation – *Conduct comprehensive, meaningful and inclusive engagement.*

- Conduct 1 community survey (online, with hard copy option)
- Conduct 1 staff survey (online)
- Facilitate 2 staff focus group conversations (virtual or in person)
- Assist in planning and material development for:
 - 6-8 key informant interviews, to be delivered by staff and board members
 - 3-5 focus groups with participants and volunteers, to be delivered by staff & board members
 - Member engagement at Annual General Meeting on March 28
- Deliver a summary document of all consultation findings

PHASE 3 – DEVELOPMENT OF STRATEGIC PRIORITIES AND PLAN

Identification of Strategic Priorities - *The format below is open to suggestion by the consultant. A priority is to ensure meaningful and inclusive staff engagement.*

- Facilitate 1 session with key staff (virtual)
- Facilitate 1 session with the board (virtual)
- Discussion document/deck for board-staff engagement session
- Facilitate 1/2 day board-staff engagement session with board and key staff (in person)
- Deliver a preliminary findings document
- Presentation of preliminary findings to board at June 26 board meeting

Develop Draft Strategic Plan

- Provide draft version of a strategic plan with implementation strategy, for validation

PHASE 4 – APPROVAL

Support Approval Process

- Provide final version of a strategic plan with implementation strategy, for board review and feedback
- Lead the board through a final approval discussion at October 30 board meeting

EXPECTATIONS

The consultant will work closely with a Board-Staff Strategic Planning Working Group, the Executive Director and designated staff.

The Board-Staff Strategic Planning Working Group will:

- Provide assistance and guidance on project activities
- Provide draft survey, focus group and interview questions
- Provide feedback on draft consultation tools and project documents
- Support the gathering and analysis of demographic data
- Coordinate and deliver some consultation activities, as identified below
- Solicit feedback from stakeholders to inform the final version of the Strategic Plan
- Present progress to the Board

Staff will:

- Provide available organizational data and documentation
- Facilitate the scheduling and coordinating of consultation and engagement activities
- Facilitate and support the completion of surveys

TIMELINE

| PHASE | | Work | Milestones |
|--|---------------------|---|--|
| 1 PLANNING | March | Work Planning | Work plan approved by board |
| 2 INFORMATION GATHERING & CONSULTATION | April – June | Environmental Scan Stakeholder Consultation | Environmental scan document completed Consultation findings summary document completed |
| 3 DEVELOPMENT OF STRATEGIC PRIORITIES & PLAN | June - September | Identification of Strategic Priorities Strategic Plan Development | Discussion document for board- staff engagement session completed Preliminary findings presented to board Draft Strategic Plan completed Validation feedback provided by Applegrove |
| 4 APPROVAL | October | Plan Finalization Board Approval | Final Strategic Plan completed Final feedback provided by Applegrove Final Strategic Plan approved |

BUDGET

Up to \$20,000 (HST not included).

PROPOSAL INSTRUCTIONS

The proposal should include the following and be no longer than eight (8) pages, excluding supplemental attachments:

1. Summary of candidate/team qualifications
2. Proposed project plan and schedule of work, describing timeline, methodologies, and roles for how the work will be accomplished
3. Description of how the process and Plan will be developed from a DEI perspective
4. Timeline
5. Project pricing, with a breakdown of costs
6. Contact information for 2 relevant references with brief description of the relationship

Proposal should be emailed as one PDF document to Susanne Burkhardt, Executive Director, Applegrove at sburkhardt@applegrovecc.ca by February 17, 2023.

EVALUATION AND AWARD

Candidate proposals will be scored by a team of evaluators based on qualifications of team, quality of plan, and pricing. Proposals that do not include the components outlined in the proposal instructions above will not be evaluated.

Proposals will be evaluated as follows:

Criteria – Weight

- 20% Candidate/team qualifications and experience (including similar work for other organizations)
- 35% Quality and completeness of proposal plan
- 25% Understanding of working from a DEI lens
- 20% Budget/pricing

Based on scoring results, up to three candidates will be invited for an interview. Interviews will account for a separate rating out of 10. Final evaluation will also include a reference checking component.

Applegrove reserves the right to negotiate price and work scope and schedule amendments with the successful candidate. Successful candidates will respect applicable policies of the agency, which will be included in a contract.

Applegrove reserves the right to cancel this RFP process at any stage, not to accept the lowest proposal submitted, or to not to award the contracts to any candidate.

Successful candidates will respect privacy and other applicable policies of Applegrove, which will be included in a contract.

TIMELINES

Proposals will be received until February 17, 2023.

Proposals will reviewed and interviews conducted with final candidates by March 1.

Proponents will be advised of the outcome by March 6, 2023