

**REQUEST FOR PROPOSALS (RFP)**  
**FOR**  
**STRATEGIC PLANNING SERVICES**

Issued by:

**Native Child and Family Services of Toronto on February 9, 2022**

Deadline for Submission of Final Proposal:  
**March 2, 2022 2 p.m. (EST)**

## TABLE OF CONTENTS

<b>1.0 PURPOSE/GENERAL INFORMATION.....</b>	<b>1</b>
1.1 Background of NCFST.....	1
1.2 Definitions.....	1
1.3 Scope of Work.....	2
1.4 Services to be Performed.....	2
1.5 Project Timeline.....	3
<b>2.0 PROPOSAL CONTENTS.....</b>	<b>4</b>
2.1 Qualifications.....	5
2.2 Evaluation and Selection Criteria.....	5
<b>3.0 PROPONENTS INSTRUCTIONS.....</b>	<b>6</b>
3.1 Submission Address and Deadline.....	6
3.2 Proposal Inquiries.....	6
3.3 Clarifications and Interpretations.....	7
<b>4.0 PROPOSAL CONDITIONS.....</b>	<b>8</b>
4.1 Right of Rejection.....	8
4.2 Right to Reissue RFP.....	8
4.3 Cost of Proposal.....	8
4.4 Decisions of Evaluation Committee.....	8
4.5 Amendment or Withdrawal of Proposal.....	9
4.6 Acceptance of Proposal.....	9

## 1.0 PURPOSE/GENERAL INFORMATION

Native Child and Family Services of Toronto (NCFST) is requesting proposals from consulting firms to facilitate and prepare a strategic plan for the upcoming five years. The strategic plan will define a long-term vision for NCFST with clearly defined priorities for the period of 2022-2027.

The successful consultant must have an in-depth experience in strategic planning along with a strong understanding of Indigenous culture. The consultant must be able to facilitate the planning process, actively engage Knowledge Keepers, board members, staff, community and stakeholders to help create a clear, concise, actionable and measurable strategic plan.

### 1.1 Background of NCFST

NCFST provides holistic and integrated child welfare prevention and support services to Indigenous children and families in Toronto. Our work is grounded in a service model developed by the community through circle and ceremony more than three decades ago. NCFST's mission is to provide support, ensure safety and enhance the quality of life for Indigenous families, children, and youth within the Greater Toronto Area. Our Agency works within a holistic framework which builds on individual and family strengths and engages clients as partners in identifying issues and their solutions.

Over the last 4 years NCFST has grown from a \$30M agency with 250 staff to a \$50M+ agency with close to 400 staff. We now deliver more than 140 programs and services across 20 locations to more than 8,000 community members annually. The increase in revenue has also been associated with a steady expansion of our prevention and early intervention services and our work with community to transform/decolonize mainstream child welfare. We face challenging historical and contemporary contexts that create barriers to us further developing a positive reputation within the Indigenous community across the Greater Toronto Area.

Additional information can be found at <https://www.nativechild.org>

### 1.2 Definitions

For the purpose of this RFP:

- I. *"Administrator" means the person of who is responsible for the administration of the RFP process and the execution of the Agreement.*
- II. *"Evaluation Committee" means the Administrator.*
- III. *"Proposal" means the Proponent's written submission in response to this RFP.*
- IV. *"Proponent" means an individual, partnership, corporation or any other person who submits a Proposal in response to this RFP.*
- V. *"RFP" means this Request for Proposal and all addenda that may be issued in respect of the RFP prior to the submission deadline.*

- VI. *"Services" means the work, tasks, goods, materials or equipment to be performed or provided by the Proponent to deliver the scope of services as described in this RFP.*
- VII. *"Submission Deadline" means the date and time set out in the front page of this RFP.*
- VIII. *"MERX" is the MERX procurement and tendering portal.*

### **1.3 Scope of Work**

The selected Consultant will work with NCFST to facilitate engagement sessions to create a strategic plan defining our organization's vision and guiding principles, develop objectives and priorities for the upcoming five years with realistic timelines.

Performance measures, indicators or deliverables should also be included wherever possible to ensure that progress can be reviewed, monitored and reported back to the community.

The Consultant will be required to facilitate a series of inclusive and interactive group engagement meetings that gather input in a prioritized manner with Knowledge Keepers, board members, staff, community, funders and other stakeholders.

Other potential forms of data collection or engagement might include the use of survey or other similar tools. Consultants are encouraged to put forth the most effective and efficient method of developing such a Plan in their proposal.

### **1.4 Services to be Performed**

This project will be a collaborative process between the Board, Consultant, and staff. The purpose of this work is the following:

- Kick off meeting with board, executive leadership circle and Knowledge Keepers.
- Design and execution of a strategic visioning and planning process with a project plan and schedule
- Environmental scan of NCFST's internal and external environment using wide range of methodologies and techniques such as SWOT analysis
- Develop a two-day Board retreat for pre-approval
- Facilitate the two-day strategic planning retreat
- Engagement and consultation with NCFST's board, executive leadership circle and Knowledge Keepers and other stakeholders
- Design and facilitate strategic planning sessions with Board of Directors
- Prepare the draft strategic plan
- Meetings to present and discuss the draft final strategic plan
- Finalize strategic plan

The final version of the strategic plan should clearly reflect NCFST’s strategic vision, goals and activities including key values and guiding principles to assist direction and decision making. The strategic plan should be clear and concise. It should also include a one-page summary that can be shared publicly with community, funders, staff and other stakeholders.

**1.5 Project Timeline**

The term of engagement is from March 15, 2022 until July 31, 2022 with the following major milestones as described below:

Clarifying questions to be submitted by:	February 16, 2022
RFP Submission deadline:	March 2, 2022
Contract awarded:	March 8, 2022
Work plan due date:	March 22, 2022
Board retreat:	May 15, 2022
Draft strategic plan completed:	June 30, 2022
Strategic plan finalized:	July 31, 2022

Note that timelines are subject to change based on possible challenges presented by the ongoing COVID-19 Pandemic.

## **2.0 PROPOSAL CONTENTS**

In order to make the evaluation process efficient and obtain maximum comparability, NCFST requires that all responses to the RFP be organized in the manner and format described below:

### **A. Executive Summary**

A description of the understanding of the work to be performed including estimated hours, the ability to perform the work within the time frame provided and other pertinent information.

### **B. Service Approach and Timeline**

Description how the Proponent's firm will approach the proposed services including the type of assistance that will be required from NCFST staff. Proposal should also discuss the proponent's knowledge of Indigenous culture and organizations. Finally, discuss the communication process used by the firm to discuss issues with management including the expected timeline.

### **C. Professional Experience**

A description of the firm's history, how and why the firm is different from other firms being considered. This should include an explanation of the firm's philosophy, size, structure and qualifications with serving Indigenous non-profit organizations with a similar size and operations. Description of the firm's resources devoted to non-profit organizations and the firm's independence with respect to NCFST.

### **D. Team Qualifications**

Identification of the specific partners and managers who will be assigned to this engagement if the firm is successful in this RFP.

### **E. Fees**

Fee structure for the full duration of the project including any guarantees given regarding increases in future years. Also, the applicable billing rates and procedures for any further questions that may come up during the year or whether these occasional services are covered in the proposed fee structure.

### **F. References**

A list of the relevant Indigenous non-profit clients the firm has served within the past five years and furnish the names and telephone numbers of any references whom NCFST may contact.

### **G. Previous Work Product**

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

## 2.1 Qualifications

To be considered a candidate for the provision of communication and public relations services for NCFST bidders must:

- Have a minimum of five (5) years of experience in providing similar services to Indigenous non-profit organizations.
- Have experience in providing these services for similar sized non-profits.
- Be current with respect to legislation relevant to the operation of non-profit organizations.
- Not be a member of the NCFST' Board of Directors.

## 2.2 Evaluation and Selection Criteria

Proposals will be evaluated by NCFST's Senior Management staff. All aspects of the submissions will be taken into consideration when evaluating the proposals. This includes the following:

- Proposed fees and costs. Value will be compared to cost and therefore the lowest cost proposal may not be selected.
- The firm's understanding of the scope of the proposed professional services as evidenced by the proposal submitted, including the firm's standards and approach.
- The background and experience of the firm in providing similar services as well as specific background, education, qualifications and relevant experience of key personnel to be assigned to the account.
- References.

NCFST may, at its discretion, request presentations by or meetings with any or all Proponents to clarify or negotiate modifications to the Proponent's Proposals. However, NCFST reserves the right to make an award without further discussion of the Proposals submitted. Therefore, Proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, which the Proponent can propose. NCFST contemplates award of the contract to the responsible Proponent with the highest total points.

### 3.0 PROPONENTS INSTRUCTIONS

#### 3.1 Submission Address and Deadline

Proponents must submit their enquiries and an electronic copy of the Proposal directly to NCFST to the following email address: [RFP.StrategicPlanning@nativechild.org](mailto:RFP.StrategicPlanning@nativechild.org)

- Receipt of proposal will be confirmed via email in 24 hours after the competition closes.
- Proposals submitted by facsimile transmission (fax) or mail will not be accepted.
- Proposals must be received on NCFST's website or via MERX portal no later than the submission deadline (as indicated on the front page of the RFP). Proposals received after the submission deadline will not be accepted.
- Proposals must be signed by the appropriate signing officer or officers of the Proponent.
- Proposals, once submitted, become the property of NCFST and held by the Administrator.
- All Proposals will be kept in the strictest of confidence subject to such disclosure as may be required under the provisions of Ontario, The Freedom of Information and Protection of Privacy Act or The Personal Health Information Act.

**It is solely the Proponent's responsibility to ensure that the Proposal is received prior to the submission deadline.**

#### 3.2 Proposal Inquiries

- Proponents shall be solely responsible for obtaining all information that may be necessary in order to understand the requirements of this RFP and submit a Proposal in accordance with its terms and conditions. No allowance shall be made for the failure of a Proponent to obtain such information or to make such investigations.
- Proponents shall examine the RFP as soon as possible after receipt. Should a Proponent discover any errors or omissions, the Proponent shall post to MERX and on NCFST's website as soon as possible, and no later than February 16, 2022 2pm, as further instructions may be issued to all Proponents before the submission deadline.
- All inquiries related to this RFP are to be directed via MERX or on NCFST's website, by **February 16, 2022 by 2pm**. Inquiries received after this date will not be answered.
- Inquiries submitted by facsimile transmission (fax) will not be accepted and/or responded. Any oral communications shall be considered unofficial and non-binding. Only written responses to written communication shall be considered official.



### **3.3 Clarifications and Interpretations**

- Each prospective Proponent shall be responsible for conducting its own due diligence on the data and information upon which their proposal is based.
- Prospective Proponents shall be deemed to have gathered all information necessary to perform their obligations under the RFP.
- Information referenced in this RFP, or otherwise made available by the Administrator as part of this RFP, is provided for the convenience of the Proponent only and NCFST does not warrant the accuracy or completeness of this information.
- Prospective Proponents that find discrepancies or omissions in the information provided, or that have questions as to the meaning or intent of various aspects of the proposal, shall at once notify the Administrator, who will, if necessary, and only send written instructions, clarifications, or explanations to all prospective Proponents who have submitted an expression of interest to this RFP.

## **4.0 PROPOSAL CONDITIONS**

A Proponent should clearly understand and by submitting a Proposal agrees that its proposal or any part of its Proposal is subject to the following conditions in addition to any other terms and conditions set out in this RFP.

### **4.1 Right of Rejection**

- The submission of a Proposal, the receipt of a Proposal, and the opening of a Proposal, or any one of those, does not constitute acceptance, in any way whatsoever, of a Proposal.
- Proposal(s) received after the submission deadline will not be considered.
- No Proposal will be considered from a Proponent where the Evaluation Committee, in its sole discretion, determines that a potential conflict of interest exists. No proposal will be considered that is in any way conditional or that proposes to impose conditions on the Administrator or NCFST that are inconsistent with the requirements of this RFP and the terms and conditions stipulated herein.
- A Proposal is not and shall not be deemed in any way to be a unilateral contract. It is an offer by the Proponent to NCFST to carry out the provisions set out in this RFP. A Proposal may be accepted or rejected based on NCFST' sole discretion.
- NCFST in its entire discretion, may reject or accept all or any part of a Proposal or any of the Proposals submitted in response to this RFP. NCFST is under no obligation whatsoever to accept the Proposal with the lowest cost, or the highest score based on the evaluation criteria, or any Proposal.

### **4.2 Right to Reissue RFP**

NCFST reserves the right to reissue the RFP where, in its opinion, none of the proposals submitted in response to the RFP warrant acceptance or where it would be in the best interests of NCFST.

### **4.3 Cost of Proposal**

Costs incurred in the preparation, presentation and submission of a Proposal shall be borne entirely by the Proponent.

### **4.4 Decisions of Evaluation Committee**

All decisions on the degree to which a Proposal meets the stated criteria or the score assigned to a Proponent or part of a Proposal will be determined solely by the Evaluation Committee. The Evaluation Committee's determinations in this regard are final (and may not be appealed by a Proponent).

#### **4.5 Amendment or Withdrawal of Proposal**

- Proponents may amend Proposals submitted in response to this RFP prior to the submission deadline by submitting an amendment clearly identifying the change or by submitting a new Proposal that clearly indicates that it is to replace the Proposal previously submitted by the Proponent.
- Amendments submitted after the submission deadline will not be considered.
- Proponents may withdraw a Proposal submitted in response to this RFP by submitting a request in writing to the Administrator at any time prior to, but not after, the submission deadline.

#### **4.6 Acceptance of Proposal**

- If the Evaluation Committee decides to accept a Proposal, it will accept the Proposal that, in the Evaluation Committee's opinion, is the best overall Proposal when evaluated in accordance with the criteria identified above. Should the Evaluation Committee decide not to accept any Proposal, all Proponents will be given written notice of such decision.
- Subject to the Evaluation Committee accepting a Proposal, a formal offer will be communicated in writing to the successful Proponent by the Administrator, in which case, the successful Proponent must sign and return offer to the Administrator within five (5) working days, failing which the Administrator may, in consultation with the Evaluation Committee, cancel its acceptance and accept the Proposal or part Proposal of any other Proponent.