

REQUEST FOR PROPOSAL FOR STRATEGIC PLANNING SERVICES

Issue date: February 26, 2025

Return date: March 28, 2025

1. Proposal Submission

Community Living Hamilton (CLH) is accountable to its funders to ensure it maximizes the value it receives from the use of public funds. Community Living Hamilton is committed to an RFP process that is fair and transparent.

Community Living Hamilton invites you to submit a proposal for the development of a three-year comprehensive strategic plan (including implementation, monitoring and evaluation tools), refreshed vision, mission, values as needed.

Proposals are to be submitted electronically with the subject "RFP –Strategic Plan 2025" addressed to procurement@clham.com.

Proposals are due no later than 11:59 p.m. on March 28, 2025 Any proposals received after this date and time will not be considered.

During the period of the proposal preparation, any questions concerning the technical requirements should be addressed to Sylvia D'Intino, via e-mail: procurement@clham.com with the subject line - "Additional Information Requested: RFP – Strategic Plan." Information considered supplemental to the RFP as determined by Community Living Hamilton will be distributed in an addendum to all respondents.

Proponents finding apparent discrepancies or omissions in this RFP should notify Sylvia D'Intino immediately.

Community Living Hamilton is not responsible for any costs related to the preparation of the response to this RFP.

2. Confidentiality

Information contained in this RFP, or information obtained by a Proponent in further discussions with Community Living Hamilton, either in writing, verbally or through observation, is confidential and must not be disclosed by a Proponent except as authorized by Community Living Hamilton in writing. If any portion of a Proponent's proposal is to be held confidential, such provisions must be identified in the proposal.

3. Selection Process

Community Living Hamilton will evaluate all proposals based on the information provided by the Proponent at the time of submission.

On completion of the evaluation process, the RFP Evaluations committee will prepare a recommendation report and forward to the Executive Director for their consideration and endorsement.

Proponents will be notified of the result of the RFP by April 18, 2025.

Community Living Hamilton reserves the right to reject any or all proposals received in response to this RFP and to negotiate with any of the Proponents or other firms in any manner deemed to be in the best interest of Community Living Hamilton.

4. Proposal Evaluation

Community Living Hamilton will evaluate proposals based on the following criteria:

- Completeness and quality of responses to the requested information
- Expertise and knowledge of the proposed team members
- The proposed fee structure relative to other proponents
- Proponent's client satisfaction as evidenced by the Proponent's references
- Demonstrable expertise in developing strategic plans for social care organizations
- Prior demonstrated expertise in high quality strategic plan collateral material

The weighting of each criterion is pre-assigned based on the priorities of Community Living Hamilton.

5. About Community Living Hamilton

Community Living Hamilton supports 1,400 people with developmental disabilities such as Down Syndrome and Autism. We are the largest service provider in Hamilton for these individuals and their families, and we are one of the largest not-for-profits and registered charities in our community.

Established in 1953, Community Living Hamilton began when a group of mothers came together to explore how they could support each other and their sons and daughters with special needs. More than 70 years later, their determination, spirit and support are reflected in our wealth of programs and services that help build great lives. These include:

- Group Living residences and support for independent living.
- Community Participation programs where people with developmental disabilities can participate in social, recreational and skills development activities.
- Fee-for-service options such as weekly social gatherings and skills-building sessions.

- Essential respite care that eases the burden on caregivers and provides a safe, enjoyable experience for children, youth and adults.
- Resource Consultants and Inclusion Facilitators who support the inclusion of children in licensed childcare settings.
- Valuable employment services, supports and more.
- Thrift Store with inclusive hiring practices

With over 250 staff members, as well as volunteers and valued community partners, we empower people with developmental disabilities to fully participate and contribute to their community. Together, we help build great lives. We encourage full inclusion through person-directed planning, work with partners to build capacity in the community and promote independence and personal choice, so our clients can lead the lives they want.

Mission:

Dedicated to providing opportunities and support to help people with special needs build great lives.

Vision:

All people with special needs achieve their full potential and are included in our community.

Tag Line:

Helping Build Great Lives.

G-R-E-A-T Values:

G – Growth That Exceeds Expectations

- We value personal growth and support our clients and staff by offering them opportunities to have new experiences and expand their skills. At Community Living Hamilton, we are all life-long learners.
- We are growing the scope and volume of services we provide. We're doing this by building capacity and pursuing excellence.
- We are growing the number and range of partnerships we have – partnerships that enable us to do more for the clients we serve. Those partnerships are with government, other agencies, community organizations, funders and advocacy groups.

R – Respect for All

We have the greatest respect for the people we serve and the people we work with. That means honouring their abilities, qualities and achievements.

E – Excellence and Safety in Everything

We Do We are committed to the pursuit of excellence in our work and are continually improving the way we serve our clients and their families. We also hold ourselves accountable for maintaining the highest standards of quality and safety in all our practices.

A – Abilities First

Above all else, we see people first – we see their abilities first. We believe everyone can make unique contributions to our community and we're dedicated to enabling and empowering them to do just that.

T – Trust and Integrity

We are honoured that our clients and the community trust us, and we are committed to maintaining that trust by demonstrating integrity, transparency and compassion in everything we do.

6. Service Requirements

Proponents must be, a consultant group or a partnership of consultants, operating in Ontario with experience and expertise in the development of strategic plans. The consultant must have knowledge and/or experience in:

- Demonstrated knowledge of the Developmental Services, Education/Early Years, Community Services and/or Social Care sectors in Hamilton and surrounding regions.
- Business information and marketing
- Non-profit trends/issues
- Research methodology
- Public consultation
- Market research and Customer Relationship Management
- Statistical analysis
- System transformation
- Information Technology and Artificial Intelligence
- Working with multiple stakeholders
- Healthcare, Long-Term Care and Mental Health sectors
- EarlyON or and Canada-wide Early Learning and Child Care System (CWELCC)
- For profit organizations providing similar services as Community Living Hamilton

7. Scope of Work

The proponent shall, at minimum, accomplish the following:

- i) Design and execute a strategic visioning and comprehensive planning process including consultation with Community Living Hamilton’s Boards of Directors, employees, users of services and key community partners.
- ii) Assess how Community Living Hamilton can align with the evolving sector, while positioning us as a leader in response to upcoming challenges and opportunities.
- iii) Develop an actionable three-year strategic plan with priorities that reflect the bold changes needed to deliver long-term growth and innovation.
- iv) Develop recommendations regarding the plan’s implementation and support structure.
- v) Develop a comprehensive workplan/implementation framework with KPI and evaluation tools, including dashboard and progress report template.
- vi) The ability to provide ongoing project management support

It is anticipated that these tasks will be accomplished through a combination of activities (in-person or virtual), such as:

- Focus groups, interviews, and/or any other method that will be useful in receiving stakeholder and community input
- Facilitated group sessions with the senior leadership team, employees and people supported to create consensus regarding a strategic plan (including goals, objectives, strategies, and tactics)
- Facilitated group sessions with the Boards and Executive Team to create consensus regarding strategic priorities (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.

8. Proponent Service Capability, Quality, and Commitment

Proponents are requested to provide information on each of the following:

- a) **Proponent firm local office experience and capability.** Please provide a brief overview of the Proponent firm local office’s history and background. Include information on the year the local office was established, an approximate number of employees and clients and any industry recognition received in the past five years.
- b) **Experience in Developmental Services sector.** Outline the approximate number of clients that the Proponent has in the Developmental Services (“DS”) sector in Ontario. A DS sector agency is considered an agency that are predominately funded by the Ministry of Children, Community and Social Services with the primary mandate of supporting individuals with a disability. Proponents may provide a list of their current DS sector clients.
- c) **Experience and expertise of client services team.** Outline the experience and qualification of the proposed client services team in alignment with service requirements.

For each member of the service team, please include the team member's function, qualifications, experience with clients in the sector, total years of experience, and years with the firm.

- d) **Project Methodology and Approach with Work Plan.** The proposal should contain the project methodology and approach and a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:
- The project methodology and approach
 - 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 along with a proposed payment schedule tied to project milestones and/or deliverables
- e) **Other value-added services.** Briefly outline any other services the Proponent can provide to Community Living Hamilton that would enhance the requested deliverables of this RFP and include on the proposed fee structure.

9. Proposed Fee Structure

Proponents are asked to outline the RFP fees. Please list the following:

- a) Proposed number of hours per each consultant
- b) Proposed fee per hour for each consultant
- c) Estimated incidental costs not included above i.e. travel, supplies, photocopies etc.

Should the Proponent find that during the engagement, that fees will exceed the total dollar amount quoted based on a)-c), the Proponent will notify Sylvia D'Intino as soon as possible. Total fees cannot exceed this amount without the authorization of Community Living Hamilton's Executive Director.

10. References

Please provide names of senior staff from four client accounts, who can attest to the proponent's quality, communications timeliness, dependability, and consistency of providing professional services.

11. Additional Documents

The following documents are also available for your information:

- [Strategic Plan 2019/20-2024/25](#)
- Annual Reports: [2021-22](#), [2022-23](#) and [2023-24](#)