



Request for Proposal

Strategic Planning Consultant

RFP Issue Date: January 30, 2024
RFP Closing Date & Time: March 1, 2024 at 12:00 pm ET

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1.0 Invitation

Big Brothers Big Sisters of London and Area (BBBSOLA) is inviting Consultants to submit a proposal for the provision of guidance and subject matter expertise in the development of a strategic planning process and to work with the BBBSOLA Board to produce a multi-year strategic plan.

BBBSOLA's budget for this project is up to a maximum of \$30,000 including all expenses and mileage. Submissions above this amount will not be considered. The successful consultant must be located in Ontario, due to funding provisions.

2.0 About Big Brothers Big Sisters of London and Area

Big Brothers Big Sisters of London and Area is a non-profit agency of Big Brothers Big Sisters of Canada located in London, Ontario. BBBSOLA has provided meaningful mentoring opportunities for youth in our communities for almost 50 years. We work with children and youth aged 6-18 who experience adversity and are in need of a strong developmental relationship. We are passionate about fostering connection, supporting growth, and celebrating the potential that exists in every youth.

Our Vision: All young people reach their full potential.

Our Mission: To enable life-changing mentoring relationships that ignite the power and potential of young people.

Values: Cultivate Quality Service, Nurture Every Relationship, Champion Potential, Strengthen Community

Please note that our current mission and vision mirror that of Big Brothers Big Sisters of Canada. We would like to explore through this process if a localized mission/vision would serve us. We also would like to revisit the set of organizational values that guide our work to ensure these remain relevant for our next chapter as an organization.

Who do we serve? Young people who face adversity and are in need of an additional, consistent, and supportive developmental relationship.

We recognize the intersectionality of the identities and lived experiences of the youth we serve. 57% of the youth currently involved in our community-based 1:1 mentoring program have indicated six Adverse Childhood Experiences (ACEs) or more. The young people currently enrolled in our program represent many underserved groups, including people of color, Indigenous, newcomers to Canada, persons with disabilities, and youth who identify as 2SLGBTQIA+.

We believe this work really takes a community, and in order to be successful, we need to lean into the Power of Three - the Family and Youth, the Organization (BBBSOLA), and the Mentor.

3.0 Services Required

3.1. Scope of Services and Deliverables

BBBSOLA's last strategic plan was a "refresh" of our strategic plan with a 2-year term, from 2022-2024. The new multi-year strategic plan will be launched at a special members meeting no later than November 2024.

Guiding Principles

The Consultant will use the following principles to guide the development of the strategic planning process:

- The planning will be informed by BBBSOLA's Mission and Vision and explore our Mission, Vision and Values in the context of our local community.
- The planning will recognize we are an agency of Big Brothers Big Sisters of Canada with standards and parameters that guide our work.
- The process will be guided by an anti-racist and anti-oppressive framework with a focus on diversity, equity and inclusivity.
- The process will be consultative with a variety of stakeholders including youth, families, mentors, staff and the Board of Directors directly, which will inform the Board's decision-making.
- The process will use a strengths-based approach to strategic planning - Strengths, Opportunities, Aspirations, Results (SOAR) or equivalent model.
- The process will be transparent.

Expectations

BBBSOLA has developed an approach to the strategic planning process based on past practices (see chart below). We recognize that the budget and the scope of the work may not align, which is why we are including areas that BBBSOLA will contribute time and resources to the work. We welcome innovative ideas if the Consultant has an alternate method to achieve the desired outcomes listed below and the timing may be flexible pending Consultant input. Our team is available to support this process, and we have included various examples of where they may assist throughout to improve efficiency and reduce time required by the Consultant. It is our expectation that in addition to the deliverables indicated on the chart below, the Consultant will:

- Provide advice to the Board's Strategic Planning Committee.
- Embed an anti-racist and anti-oppression framework into the planning process and into the strategic plan.
- Schedule monitoring and milestone meetings to support the process.
- Provide guidance to BBBSOLA's staff and Board on how to conduct planning sessions with stakeholders.

BBBSOLA will:

- Schedule and coordinate meetings and recruitment for the key stakeholder interviews.
- Provide video conference technical support.
- Administer online surveys and produce reports as required.

- Based on advice from the Consultant, BBBSOLA or the Board can facilitate stakeholder engagement sessions as needed.
- Communicate progress to the Strategic Planning Committee.
- Present progress to the BBBSOLA Board.
- Communicate and seek feedback from stakeholders to inform the final version of the strategic plan.

PHASE 1: GATHER INFORMATION

The following includes a tentative schedule and outline of tasks to assist interested Consultants with the anticipated schedule (dates and times) of significant events associated with this RFP. We are open to discussing changes to the specific dates and timeline so long as the final product is delivered by November 2024. BBBSOLA reserves the right to alter the schedule at its sole discretion.

Date	Work	Deliverable/ Outcome	Consultant Work	BBBSOLA Work
March 2024	Review relevant documentation and kick off meeting: <ul style="list-style-type: none"> ● Introductions ● Present work plan to the Strategic Planning Committee ● Confirm milestones and critical paths ● Discuss strategic planning process, get input from the Committee to move forward on the initial phases of work ● Questions and answers 	<ul style="list-style-type: none"> ● Approval of the strategic planning process 	✓	✓
April 2024	Environmental Scan: <ul style="list-style-type: none"> ● With input from the BBBSOLA staff, prepare an environmental scan on the current state and possible future state of the organization. 	<ul style="list-style-type: none"> ● Environmental scan PowerPoint completed 	✓	✓
May 4-5 2024	Facilitated Sessions: <ul style="list-style-type: none"> ● Facilitate in-person sessions with the BBBSOLA Board, staff team and other identified groups (i.e. volunteer mentors, youth, families, donors) 	<ul style="list-style-type: none"> ● Sessions completed 	✓	✓
May-June 2024	<ul style="list-style-type: none"> ● With input from the Committee, Consultant to draft stakeholder surveys ● Conduct stakeholder surveys ● Produce a report from the surveys and identify themes 	<ul style="list-style-type: none"> ● Survey developed and executed 	✓	<ul style="list-style-type: none"> ✓ ✓

Date	Work	Deliverable/ Outcome	Consultant Work	BBBSOLA Work
May-June 2024	<ul style="list-style-type: none"> Conduct key informant interviews designated in partnership with BBBSOLA (community partners, external community groups) 	<ul style="list-style-type: none"> Key informant interviews completed 	✓	
July-Aug 2024	<ul style="list-style-type: none"> Conduct analysis and review of findings 	<ul style="list-style-type: none"> Summarize and analyze the results from the surveys, key informant interviews, and planning sessions to identify potential priorities, objectives and outcomes for Board's consideration. 	✓	

PHASE 2: ESTABLISH PRIORITIES

Date	Work	Deliverable/ Outcome	Consultant Work	BBBSOLA Work
Sept. 2024	<ul style="list-style-type: none"> Presentation of preliminary findings to BBBSOLA, including input on current mission, vision and values Board considers possible strategic priorities with consultant recommendations. 	<ul style="list-style-type: none"> PowerPoint on key themes, opportunities, priorities etc. 	✓	
Sept. 2024	<ul style="list-style-type: none"> Facilitate discussion about potential priorities with a variety of stakeholders 	<ul style="list-style-type: none"> Additional input on priorities gathered 	✓	

PHASE 3: VALIDATE PRIORITIES, GATHER FEEDBACK, DEVELOP STRATEGIC PLAN

Date	Work	Deliverable/ Outcome	Consultant Work	BBBSOLA Work
Sept. 2024	<ul style="list-style-type: none"> Consolidate feedback on priorities and confirm Board validates/refreshes mission and vision (if required) and identifies key areas for strategic directions 	<ul style="list-style-type: none"> PowerPoint with strategic priorities identified 	✓	

Date	Work	Deliverable/ Outcome	Consultant Work	BBBSOLA Work
October 2024	<ul style="list-style-type: none"> • Prepare draft strategic directions and plan 	<ul style="list-style-type: none"> • Draft developed 	✓	
October 2024	<ul style="list-style-type: none"> • Make recommendations to the Board on strategic planning tools for monitoring progress • Provide advice and guidance on the length of the strategic plan for the Board's decision • Finalize strategic directions and plan for Board adoption 	<ul style="list-style-type: none"> • Final strategic plan developed 	✓	

3.2. Desired Skills and Experience

- Proven experience in strategic planning with the not-for-profit sector including experience with conducting stakeholder consultations, gathering and analyzing data to inform decisions.
- Demonstrated experience in anti-racist and anti-oppression approaches.
- Knowledgeable about strategic planning tools.
- Demonstrated experience in appreciative inquiry approaches (or equivalent).
- Familiarity with using the Strengths, Opportunities, Aspirations, Results (SOAR) approach in strategic planning (or equivalent model).
- Excellent facilitation and communication skills.
- Successful facilitation experience using virtual platforms and a hybrid approach.
- Understanding of mentorship, youth development and social services an asset.

3.3. Reporting and Working Relationship

The successful Consultant will report to the Executive Director and engage with the Strategic Planning Committee, which will consist of BBBSOLA Board members and staff at regular intervals.

3.4. Timeline

The contract with the successful Consultant will begin approximately in March 2024 and be completed by November 2024. However, BBBSOLA is open to a shorter timeline based on the Consultant's expertise. The project needs to be completed and presented to stakeholders by November 2024.

4.0 Proposal Submission Guidelines

4.1. Communication after Issuance of RFP

The Client Representative is:

Paul David

E-mail: info.london@bigbrothersbigsisters.ca



Consultants are prohibited from contacting any staff to obtain any information pertaining to this RFP, RFP Process, or to demonstrate or justify the Consultant’s services or relay other benefits of doing business with BBBSOLA. It is inappropriate for the Consultant to initiate contact with any member of the Strategic Planning Committee or any other staff unless specifically requested to do so by the Client Representative. Please note that it is inappropriate for the Consultant to engage in any entertaining of any staff member connected with this RFP. Any Consultant who fails to comply with this requirement may be disqualified from the bidding process.

4.2. RFP Schedule

The following is a summary of the key dates in the RFP process.

Event	Date
RFP release	January 30, 2024
Deadline for RFP inquiries	February 23, 2024 at 10:00am ET
RFP closing date	March 1, 2024 at 12:00 pm ET
Interviews with eligible Consultant(s), if needed	Week of March 18, 2024
Reference Checks	Week of March 18, 2024
Award notification and contract signing with the successful Consultant	March, 29, 2024

Note: BBBSOLA intends to adhere to this timetable but realizes that delays may occur. BBBSOLA reserves the right to amend any of the dates set forth above.

4.3. When and Where to Submit a Proposal

Proposals are to be submitted by email to the Client Representative only. All submissions via e-mail are deemed received once the email has entered the email inbox of the Client Representative. The Client Representative shall not be responsible for any email delivery issues or technical problems with regard to the submissions. Consultants will receive confirmation that their submission has been received within two business days.

Late proposals will not be accepted. It is the Consultant’s responsibility to ensure that proposals are submitted on or before the RFP Closing Date.

4.4. Mandatory Submission Requirements

To be eligible for consideration, Consultants must submit the following by email in electronic PDF format:

- **one (1) proposal document (max 15 pages);** and
- **one (1) separate pricing document.**

Consultant proposals are to include the following mandatory submission requirements that are **to be listed in the following order**. Failure to include any of the following information may result in disqualification from the RFP process.

Mandatory Submission Requirements	Details to Include
a. Cover Letter	i. The full legal name of the Consultant. ii. The business address, email address and telephone number for the Consultant. iii. A short introduction of the Consultant including a brief description of experience providing similar services to other clients. iv. A <u>clear statement</u> that the Terms and Conditions of this RFP have been read, are understood and agreed to in their entirety and confirming that the information provided in the proposal is accurate. v. The cover letter is to be <u>signed</u> by an authorized representative of the Consultant. vi. A <u>clear statement</u> noting that the individual signing the proposal has the authority to bind the Consultant.
b. Workplan Approach	i. A description of the Consultant's approach to performing the services listed in Section 3, including project phases with: <ul style="list-style-type: none"> ● Tasks – including roles of the Consultant and BBBSOLA staff. ● Decision points. ● Deliverables (including reports and key recommendations). ● Timelines.
c. Consultant experience	i. Provide details on your past 3 projects as they relate to the RFP requirements. ii. Strategic planning experience. iii. Knowledge and experience with the not-for profit and/or social service/youth-development sector. iv. Experience with anti-racist, anti-oppression and equity approaches. v. Experience with appreciative inquiry approaches (SOAR) or equivalent model.
d. Consultant Resume	The Consultant resume should demonstrate the required skills, experience and ability to deliver the services required in Section 3.
e. Conflict of Interest Form	Include a completed and signed Conflict of Interest Form (Schedule A).

Mandatory Submission Requirements	Details to Include
f. References	Three (3) references of clients with similar service requirements and include: <ul style="list-style-type: none"> i. Organization name, client contact name, position, phone number and email address. ii. Brief description of the services provided and include organization type (not-for profit, private etc.).
g. Pricing	Provide pricing information using the template provided in Schedule B . This must be a separate document.

4.5. Withdrawal or Amendment of Proposal

A Consultant may withdraw or amend its proposal any time prior to the RFP Closing Date by written notice to the Client Representative.

4.6. Proposal Irrevocable

Subject to the Consultant's right to withdraw a proposal prior to the RFP Closing Date, proposals will be irrevocable by the Consultant and will remain in effect and open for acceptance by BBBSOLA until three (3) months from the RFP closing date.

4.7. Addenda

The issuance of addenda will be the only method recognized for revisions to the RFP document. BBBSOLA will make its best effort to issue addenda within a reasonable period of time.

4.8. Clarification and Verification of Proposal

BBBSOLA reserves the right to seek clarification and supplementary information from Consultants after the submission deadline. The response received by BBBSOLA from a Consultant shall, if accepted by BBBSOLA, form an integral part of that Consultant's submission.

BBBSOLA reserves the right to verify any Consultant statement or claim by whatever means BBBSOLA deems appropriate and may reject any Consultant statement or claim if, in the judgment of the BBBSOLA, the statement or claim appears unwarranted or not credible.

4.9. Consultant Inquiries

All inquiries regarding this RFP should be directed by email to the Client Representative by the RFP Deadline Inquiries stated in **Section 4.2**. BBBSOLA will issue a summary of questions and answers to all prospective Consultants. Consultants that submit inquiries will not be identified in communication with other prospective Consultants.

4.10. Conflict of Interest

Each proposal must include confirmation that the Consultant does not and will not have any conflict of interest (actual or potential) in submitting its proposal, or if selected, with its contractual obligations under the Contract. Where applicable, the Consultant must disclose in its proposal, information pertaining to any situation which may be a conflict of interest in submitting a proposal or, if selected, with the contractual obligations of the Consultant under the Contract. Each Consultant will sign and return an original copy of the Conflict of Interest Form attached in **Schedule A**.

The proposal of any Consultant may be disqualified where that Consultant fails to provide confirmation of the foregoing or makes misrepresentations regarding any of the above. Further, BBBSOLA, in addition to any other remedies it may have in law or in equity, shall have the right to rescind any contract awarded to a Consultant if BBBSOLA, in its sole discretion, determines that the Consultant made a misrepresentation regarding any of the above.

4.11. Type and Term of Contract for Product/Service

The selected Consultant will be required to enter into a service agreement with BBBSOLA. The RFP and the Consultant's Proposal will become part of the Services Agreement for the selected Consultant.

4.12. No Guarantee of Volume of Work or of Exclusivity of Services

BBBSOLA makes no guarantee of the value or volume of work that will be available to the selected Consultant.

5.0 Evaluation Process

5.1. RFP Evaluation Process

The Strategic Planning Committee will evaluate the RFPs. There will be stages of evaluations that consist of the following:

Stage 1: Validate mandatory submission requirements according to **Section 4.4**.

Stage 2: Evaluate the work plan approach and knowledge and experience components of the proposal. Following stage 2, the top three proposals will be selected to move forward to stage 3.

Stage 3: Evaluate the pricing information.

Stage 4: Interview Consultants who have successfully completed the stages above and have been invited for an interview.

Stage 5: Verify reference information.

5.2. Evaluation Criteria

Stage	Evaluation Process	Points	Score
1	Mandatory Submission Requirements (Section 4.4)	Pass / Fail	Pass
2	Proposal Evaluation (Minimum score for consideration 45 pts)		
	Overall quality and completeness of proposal	5	
	Work Plan Approach	30	
	Experience with strategic planning in the non-profit sector	15	
	Knowledge and experience with the not-for profit and/or youth development sector	5	
	Experience with anti-racist, anti-oppression and equity approaches	10	
	Experience with appreciative inquiry approaches (SOAR) or equivalent model	5	
	Consultant Resume	10	
3	Interview Evaluation – if deemed necessary	10	n/a
4	Price Evaluation	Rank 1-3	n/a
5	References	Pass / Fail	Pass

5.3. Pricing Information

Please prepare pricing using the template in **Schedule B**. Pricing will be scored as follows out of 10:

The lowest proposed price will receive a maximum score of 10 points. The other proposed prices will receive a score that is proportional to the extent by which they exceed the lowest proposed price. The formula to be utilized to determine the pricing score is as follows:

$(\text{Lowest proposed price} \div \text{the Consultant's submitted proposed price}) \times 10 \text{ points.}$

5.4. Selection of a Consultant

Each stage is evaluated separately and in sequential order. Eligible Consultants must achieve a score higher than the minimum score in each stage to participate in the next stage. If interviews are deemed necessary by BBBSOLA, selected Consultants may be invited to participate in an interview. A maximum of three (3) eligible Consultants with the highest point scores up to Stage 3 may be invited to participate in an interview. Consultants who are not selected for an interview will be informed of this outcome.

The proposal with the lowest price does not automatically guarantee a winning proposal. In addition, there is no guarantee that any of the submitted proposals will be accepted.

5.5. Contract Award

BBBSOLA will make the award to the successful Consultant that can provide the best proposal for BBBSOLA. The selected Consultant's entire proposal will be evaluated on the basis of the response



to all information requested in this RFP. The successful Consultant will be invited to enter into a Services Agreement with BBBSOLA. Notice of selection to the Consultant will be in writing.

5.6. Failure to Enter into Agreement

If a selected Consultant fails to execute the Services Agreement within a period of 30 days of notice of selection, BBBSOLA may, in its sole and absolute discretion and without incurring any liability, rescind the selection of that Consultant.

6.0 Terms & Conditions

6.1. Reservation of Rights of Big Brothers Big Sisters of London and Area

In addition to any other express rights or any other rights which may be implied in the circumstances, without liability, cost, or penalty to BBBSOLA, BBBSOLA may at any time prior to or after the RFP Closing Date:

- a) Waive formalities and accept proposals that substantially comply with the requirements of this RFP;
- b) Waive irregularities in any Consultant's proposal;
- c) Check references other than those provided in the proposal;
- d) Disqualify a Consultant whose proposal contains misrepresentations or any other inaccurate or misleading information;
- e) Disqualify a Consultant or the proposal of a Consultant who has engaged in conduct prohibited by this RFP;
- f) Accept or reject a proposal if only one proposal is submitted;
- g) Select any Consultant other than the Consultant whose proposal reflects the lowest pricing;
- h) Cancel this RFP process at any stage;
- i) Cancel this RFP and issue a new RFP for the same or similar services;
- j) Discuss with any Consultant different or additional terms to those contemplated in this RFP or in any Consultant's proposal;
- k) Accept a Consultant's Proposal as is, or negotiate with any Consultant any new requirements or terms, or changes that may be deemed necessary by BBBSOLA; and
- l) Reject any or all proposals in the absolute discretion of the BBBSOLA.

Any amendment or supplement to this RFP will be communicated to interested parties in the same manner in which this RFP was issued.

Any reference to RFP in this document will mean this RFP and all addenda, amendments or supplements, if any.

6.2. Costs

The Consultant will bear all costs associated with or incurred in the preparation and presentation of its proposal. Neither the failure of the Consultant to understand the RFP, nor BBBSOLA's rejection of any or all proposals, will render BBBSOLA and their respective affiliates liable for any costs, penalties or damages. The Consultant will not hold BBBSOLA and their respective affiliates



liable for any error or omission in any part of this RFP. BBBSOLA does not guarantee or warrant that such information is accurate, comprehensive or exhaustive.

6.3. Confidentiality

All information distributed in connection with this RFP is confidential, and is to be used for the sole purpose of completing submissions and are to be used for no other purpose unless prior written consent has been provided by BBBSOLA. All material and information distributed will remain the property of BBBSOLA to be used at their discretion.

All Consultants electing not to submit a proposal will dispose of any and all confidential information in a responsible manner.

6.4. Governing Law

The RFP, the Consultant's proposal and every document that will be required to be executed by the parties pursuant to the RFP will be governed by the laws of Ontario and the laws of Canada applicable therein, without reference to their respective conflict of laws principles.

Schedule A: Conflict of Interest Form

The Consultant must complete **either Part 1 or Part 2**, by marking the box in the appropriate section.

PART 1:

The Consultant declares that:

- there was no Conflict of Interest in preparing its submission; and
- there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the Request for Proposal.

● **OR**

PART 2:

The Consultant declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Consultant foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the Request for Proposal.

If the Consultant declares an actual or potential Conflict of Interest by marking the box in **PART 2** above, the Consultant must set out below details of the actual or potential Conflict of Interest:

Signature:

Officer of the Company

Date

Schedule B: Pricing Template

Consultants must prepare pricing using the following template below. Please include all anticipated expenses and mileage.

TIMELINE	WORK	DELIVERABLE / OUTCOME	CONSULTANT WORK EFFORT (HOURS)	CONSULTANT HOURLY RATE	COST
SUB-TOTAL					
TAX					
*TOTAL CONTRACT PRICE					

*The total contract price will be used in the pricing ranking in **Section 5.3**.