



Request for Proposal
Provision of Maltby Centre Strategic Plan 2021 – 2024

Summary of Opportunity

Maltby Centre is seeking requests for proposals (“RFP”) from qualified consultants and/or consulting firms to assist in the development of a three year comprehensive strategic plan that will focus on the organization’s values, services, and vision for the future. Our organization is particularly interested in exploring the strategic intent methodology and for Board approval and implementation beginning April 01, 2021. Our total budget for this work is \$20,000.

Background

Maltby Centre (“Maltby”) is a non-profit lead agency in Kingston, Ontario responsible for delivering child and youth mental health care and autism programs for its catchment area in eastern Ontario covering Kingston, Frontenac and Lennox & Addington (“KFL&A”). These wide ranging programs cover all age groups, including young adults up to the age of 24. In addition to the Kingston site, Maltby delivers programs in four community outreach centres in Amherstview, Napanee, Sharbot Lake, and Sydenham.

Maltby is dedicated to making positive changes in the lives of children and youth and employs a variety of professionals with specialized skills in mental health and autism.

Your response should cover any future challenges delivering services to these remote locations and/or outline future potential geographic expansion to ensure Maltby fulfills its mandate.

Under the current funding model, Maltby is fully funded by two separate agencies of the provincial government at an agreed upon budget level. Specifically, The Ministry of Health (“MOH”) funds child and youth mental health program delivery, both directly to Maltby, and, to Maltby as a funder to engage other community agencies in purchased services on a flow through basis. For autism client program delivery, the Ministry of Children, Community and Social Services (“MCCSS”) funds Maltby on the same basis, both directly and to purchase services from other community partners. Funding from both sources for the latest fiscal year was approximately \$17 million.

Scope of Work

Maltby currently has a strategic plan for the years 2016-2021. As expected, significant changes have occurred since that time that have affected Maltby’s potential future funding model, delivery of services – both physically and virtually, staff engagement, productivity and

government reporting requirements. Priorities that were identified previously may or may not be considered relevant in this new working environment.

The consultant and/or consulting firm shall, at minimum, accomplish the following:

Planning Activity and Final Deliverable

- Design and execute a strategic visioning and comprehensive planning process including consultation with Maltby Centre Board of Directors, staff, clients of Maltby Centre services and key community partners
- Develop an actionable three-year strategic plan or strategic intent
- Develop recommendations regarding the plan's implementation and support structure

Research

It is anticipated that these tasks will be accomplished through a combination of activities, such as:

- Focus groups, interviews, and/or any other method that will be useful in receiving stakeholder and community input
- Facilitated group meetings with partners to create consensus regarding a strategic plan (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.

The consultant and/or consulting firm will have knowledge and experience in:

- Non-profit trends/issues
- Research methodology
- Public consultation
- Market research
- Statistical analysis
- Presentations
- Working with multiple stakeholders
- Demonstrated knowledge of the healthcare/community support sector in the KFLA area.

Anticipated Process for Strategic Plan/Strategic Intent Development

Stage 1. Vision and key Strategic Direction and goals

This stage includes consensus building among the key informants to identify key strategic directions & goals after consultation with clients, Board of Directors, staff and community partners. This stage should produce the substantive documentation and solutions needed for informing the strategic planning process.

Stage 2. Write the strategic plan

Utilizing information from the first stage, this stage will include the development of an actionable strategic plan that will serve as the overall blueprint for Maltby Centre's action plans for the next five years. This plan should include:

- An Executive Summary of the main findings, including key recommendations numbered and priority ranked
- A comprehensive, detailed plan that identifies:
 - Vision & Mission
 - Key Strategic Directions
 - Goals
 - Objectives
 - Strategies
 - Tactics
 - Stakeholders and their roles
 - Measures
 - Outcomes
- Supplementary information should include:
 - Initial communications strategies (What are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)
 - Key values and guiding principles to assist direction and decision-making
 - A detailed strategic planning process model complete with key milestones and timelines
 - Performance measurement tools during the implementation phase
 - Strategic areas of focus and service priorities for the next 3 years.

Proposal requirements

All proposals must indicate they are complete and indicate that they are for a fixed price, including all taxes. The Maltby Centre budget for this project is set at \$20,000. Proposals must contemplate that staff will not be able to advise complete information about the future state of Maltby's operations. There is no ability to expand scope or increase any price based on imperfect information. By its nature, a strategic plan will not have all of the required information readily available.

Proposals must adhere to the Request for Proposal Timeline outlined below. Maltby and its Board agrees to follow this timeline but retains the right to accept the proposal that they feel best meets its needs, which may or may not be the lowest cost proposal received.

General Information

The consultant understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, fax number and email address for each person engaged in scope activities. Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the “point” person for the purposes of this RFP and the engagement.

Consultant Qualifications

To accomplish the scope requested, the consultant will need to possess, and demonstrate, the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Knowledgeable of the non-profit sector and issues
- Knowledge of the current child/youth mental health sector and the autism sector
- Working knowledge of the healthcare & community support systems in KFLA area
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process
- Knowledgeable in marketing, communications, and branding
- Knowledgeable in resource development.

Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant/consulting firm in order to complete the requested scope of work, including:

- 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 for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables.

Criteria for Evaluating Success of the Project

The Board of Directors will deem this a successful project when they are given a clear report which outlines the strategic directions, areas of improvement and a recommended action plan. Previous strategic and other plan materials will be provided to the consultant as background information upon request.

References

The proposal should include three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address.

Previous Work Product

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

Proposal Review Criteria

Proposals will be reviewed using the following criteria:

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| 1. Qualifications (35 points) | <ul style="list-style-type: none">• The consultant has the qualifications needed to successfully complete the scope of work• The consultant has prior experience working on similar projects• The consultant has extensive working knowledge of healthcare and community services in the KFLA area |
| 2. Scope of Proposal (30 points) | <ul style="list-style-type: none">• The proposal demonstrates an understanding of the project objectives and desired results• The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan• The proposal illustrates the consultant's ability to successfully execute the proposed approach• The proposal includes an appropriate process to interact with the Board members, staff, and community stakeholders |
| 3. Work Plan (25 points) | <ul style="list-style-type: none">• The proposal adequately details project activities and milestones or deliverables associated with each stage of the scope of work• The proposal includes a detailed timeline for each stage• The work can be completed within the project timeline |
| 4. Budget (10 points) | <ul style="list-style-type: none">• The proposal includes a detailed budget for each stage of the scope of work• Proposed costs are reasonable• Proposed schedule of payments corresponds appropriately with tasks, milestones or deliverables |
| 5. Reference Checks (25 points) | <ul style="list-style-type: none">• The reference would hire the consultant again• The original scope of service was completed within the identified time-line• Interim deadlines were met in a timely manner• The consultant was responsive to client needs• The consultant anticipated challenges and solved them quickly and effectively• The original scope of service was completed within budget. |

Request For Proposal Timeline

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| RFP issued | August 14, 2020 |
| Respondent phase | August 14 – August 31, 2020 |
| Deadline for respondent questions | September 14, 2020 |
| Closing date | September 21, 2020 5:00PM |
| Review of responses | September 23 – September 30, 2020 |
| Presentations – if required | October 1 – October 9, 2020 |
| Contract execution | October 14, 2020 |