



Strategic Plan 2024 - 2028

Request for Proposals

January 15, 2024

Contact:

Lisa McNee-Baker

Executive Director

Community Living Ajax, Pickering & Whitby

Lisa.mcneebaker@clapw.org

905-427-3300 ext. 237



TABLE OF CONTENTS

Timeline	3
Background	3
Purpose	3
Scope	4
Anticipated Process for Strategic Plan Development	5
Proposal	6
Criteria for Evaluating Success of the Project	7
Application Review Criteria	7
Reference Checks	8

TIMELINE

January 15, 2024	Release Request for Proposals
January 30, 2024	Consultant questions due
February 16, 2024	Proposal deadline. Proposals to be submitted via email to Lisa McNee-Baker, Executive Director, at lisa.mcneebaker@clapw.org
Feb 23-March 3, 2024	Interview consultants
March 15, 2024	Consultant selected & advised
April 1 – June 1, 2024	Public Consultation period
June 30, 2024	Consultant’s report due
August 1, 2024	Board approval

BACKGROUND

Community Living Ajax Pickering & Whitby (“CLAPW”) is a not-for-profit charitable organization whose mission is dedicated to supporting people with developmental disabilities so they can live full lives and be effectively, safely, and inclusively supported in their own communities.

The current Vision, Mission & Values of CLAPW can be found in the attached Appendix “A”.

With a staff roster of **185**, CLAPW provides services and supports to approximately 300 people who have an intellectual disability.

Our operating budget of \$10,716,826 is funded through the Ministry of Children, Community & Social Services, private donations and other fundraising efforts. An organizational chart and Board roster has been included as Appendix “B”.

For more information, please visit www.cl-apw.org

PURPOSE

CLAPW is seeking proposals from qualified consultants and/or consulting firms to assist in the development of a four-year comprehensive strategic plan that will focus on the organization’s values, services, and vision for the future. The successful candidate, in consultation with the Board and

other interested parties, will prepare a comprehensive plan, emphasizing innovation, sustainability, and alignment with CLAPW's values. This plan will map out the strategic direction for CLAPW for the next four years; addressing the emerging trends and challenges within the developmental services sector.

Our interested parties include the CLAPW Board of Directors, staff, supported individuals, families, caregivers, volunteers, and community partners.

Proposals must be received no later than February 16, 2024, at 4:30 p.m. to Lisa McNeer-Baker, Executive Director at lisa.mcneerbaker@clapw.org. Please quote "RFP Strategic Plan" in the subject line.

SCOPE

The consultant shall, at minimum, accomplish the following:

Planning Activity and Final Deliverable

1. Design and execute a strategic visioning and comprehensive planning process including consultation with CLAPW Board of Directors, staff, volunteers, users of CLAPW services including families, and key community partners, inclusive of diversity, equity, and inclusion considerations.
2. Develop an actionable four-year strategic plan that reflects the diverse needs, perspectives, and aspirations of all interested parties.
3. Develop recommendations regarding the plan's implementation and support structure incorporating strategies that foster an inclusive and accessible environment for all individuals, regardless of background or ability.

Research

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

- Conducting focus groups, interviews, and/or utilizing any other method that ensures meaningful representation of all interested parties, including those from underrepresented or marginalized groups.
- Facilitating group meetings with special attention to creating consensus regarding a strategic plan that is inclusive of diverse goals, objectives, strategies, and tactics.
- Reviewing and presenting available related data and partner strategic plans through an equity lens, acknowledging and addressing disparities where identified.

The consultant will have knowledge and experience in:

- Developmental Services Sector
- Non-profit trends/issues
- Research methodology
- Public consultation
- Market research

- Statistical analysis
- Presentations
- Working with multiple stakeholders
- Demonstrated knowledge of the developmental services sector in Durham Region

ANTICIPATED PROCESS FOR STRATEGIC PLAN DEVELOPMENT

CLAPW seeks the consultant's recommendations regarding the best process to develop an actionable strategic plan to be conducted in two stages.

Stage 1. Key strategic directions and goals

This stage includes consensus building among the interested parties to:

- Identify **key strategic directions and goals** after consultation with supported individuals, inclusive of persons living with intellectual disabilities and their families/supporters, Board of Directors, staff, and key community partners using culturally sensitive and inclusive methods that respect diverse backgrounds, perspectives, and communication styles.

Recognizing the need for accessibility in the engagement process, the consultant is encouraged to integrate technology-enabled methods to ensure widespread participation, especially from interested parties facing potential accessibility challenges. This involves:

1. Virtual Platforms: Utilize virtual platforms for meetings, focus groups, and consultations, allowing for broader accessibility and reducing potential barriers to participation.
2. Accessible Communication Tools: Implement communication tools and technologies that cater to diverse needs, ensuring that information is disseminated in formats accessible to all stakeholders, including those with varying abilities.
3. Surveys and Interactive Platforms: Leverage technology for surveys and interactive platforms to gather input, enabling participants to provide feedback in a manner comfortable and accessible to them.

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 CLAPW's action plans for the next four 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 and 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 4 years
- Services and supports (both current and new) that will support goals, including potential external partnerships.
- A review of the current status of CLAPW’s organization, including existing plans, policies, financial status, long-term goals and other relevant, related research deemed necessary.
- Copies of any communication items such as newsletters, publications, media releases, public meeting agendas, website updates, etc.

PROPOSAL:

Proposals must include the following:

1. 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, 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.

2. 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 developmental services sector and issues
- Knowledgeable of the Ministry’s *Journey to Belonging* framework
- Working knowledge of the healthcare and community support systems in Durham Region
- 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

3. Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant 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 communication plan outlining how regular progress updates will be provided to CLAPW's Strategic Planning Committee.
- A detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables. **Overall budget must not exceed ten thousand dollars (\$10,000.00 CAD).**

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. The plan must take into consideration and align with the Ministry of Children, Community and Social Services "Journey to Belonging" framework. 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).

APPLICATION REVIEW CRITERIA

The proposals will be reviewed and evaluated based on the following criteria:

1. Qualifications (25 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 the developmental services sector.
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<p>2. Scope of Proposal (30 points)</p>	<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 and other interested parties. •
<p>3. Work Plan (35 points)</p>	<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. • Proposed schedule of payments corresponds appropriately with tasks, milestones, or deliverables.

REFERENCE CHECKS

Information from references will be evaluated using the following criteria. The evaluation will be labeled as satisfactory or unsatisfactory.

References

(Satisfactory/Unsatisfactory)

- The reference would hire the consultant again
- The original Scope of Services was completed within the specified timeline
- Interim deadlines were met in a timely manner
- The consultant was responsive to the referee's needs
- The consultant anticipated problems, and solved them quickly and effectively
- The original Scope of Services was completed within the project budget

Consultants may be asked to participate in an interview to further gauge their fit and ability to work on this project. If needed, interviews will be scheduled to take place between February 26th to March 3rd, 2024.

Consultant selection will be based on the evaluation of the consultant's written proposal, an interview process, and the results of the reference checks.

Questions of the Consultant:

Any clarifying questions about this RFP should be made prior to January 31, 2024 to:

Lisa McNee-Baker
Executive Director
Community Living Ajax Pickering & Whitby
Lisa.mcneebaker@clapw.org
905-427-3300 ext. 237

SCHEDULE 'A'



Vision

Inspiring Dreams, Possibilities & Inclusion

Community Living Ajax-Pickering and Whitby envision a society where everyone belongs – living in a state of dignity, sharing meaningfully and safely in all elements of community life, and having opportunities to participate effectively. In our future vision, there is genuine inclusion for all.

Mission

Supporting people with developmental disability so they can live full lives and be effectively, safely and inclusively supported in their own communities

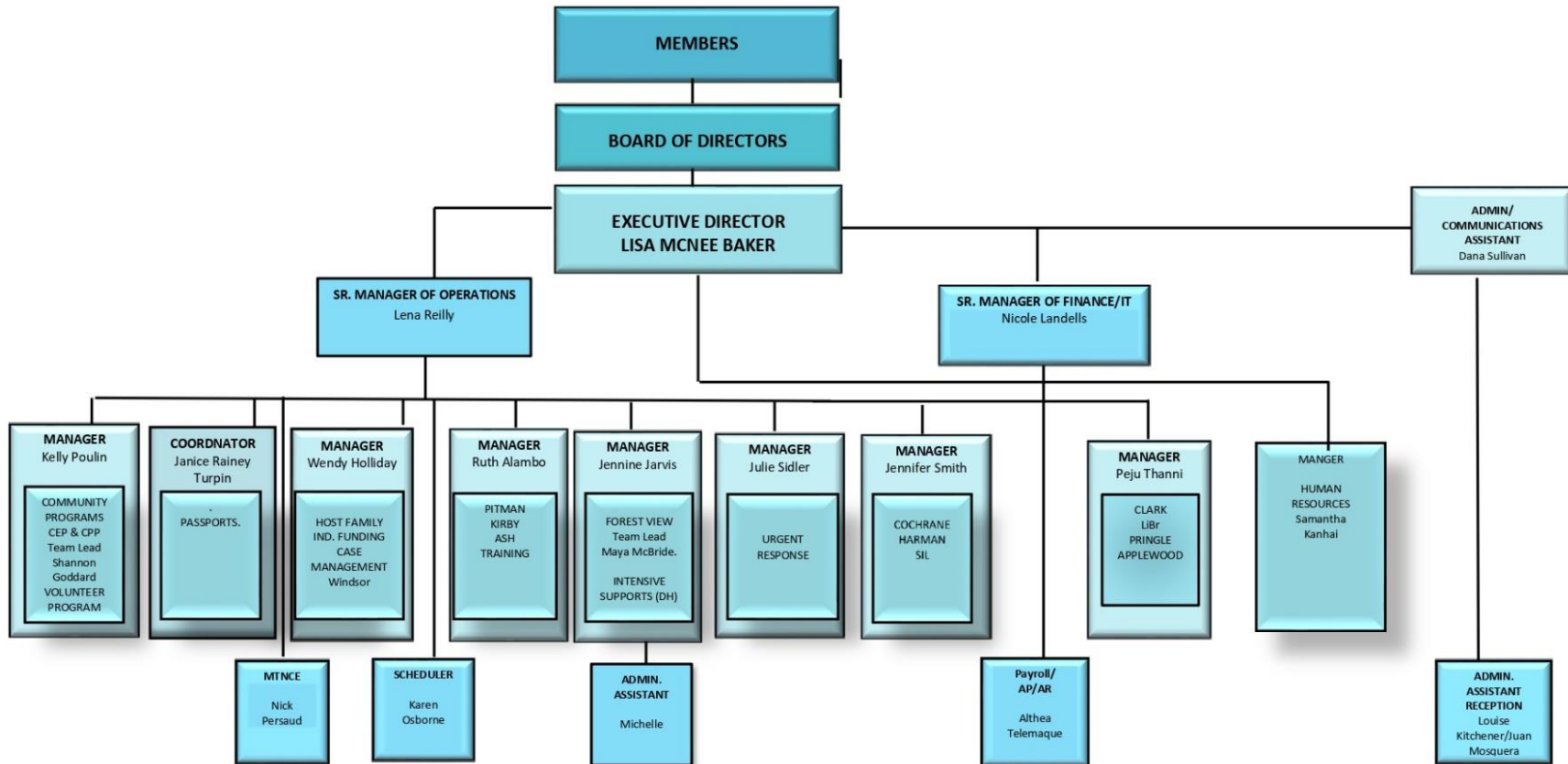
Values

We believe in and make critical decisions based on the organization's core commitments to:

- Honesty
- Integrity
- Transparency
- Accountability

SCHEDULE 'B'

COMMUNITY LIVING AJAX-PICKERING AND WHITBY- ORGANIZATIONAL CHART



COMMUNITY LIVING AJAX-PICKERING & WHITBY

BOARD OF DIRECTORS 2023-2024

<p><u>PRESIDENT</u> STEWART, JACKIE</p> <p>Jackie.stewart@clapw.org</p>	<p><u>VICE PRESIDENT</u> O'DELL, WENDY</p> <p>wendy.odell@clapw.org</p>
<p><u>TREASURER</u> PALMER, ROBERT</p> <p>Robert.palmer@clapw.org</p>	<p><u>SECRETARY</u> SMITH, AMBER</p> <p>Amber.smith@clapw.org</p>
<p><u>DIRECTOR</u> HARDING, SANDRA</p> <p>Sandra.harding@clapw.org</p>	<p><u>DIRECTOR</u> THORNTON, SYLVIA</p> <p>Sylviathornton99@icloud.com</p>
<p><u>DIRECTOR</u> JOSE, PHILOMINA</p> <p>Philomina.jose@clapw.org</p>	<p><u>DIRECTOR</u> NEWTON, DENYSE</p> <p>Denyse.newton@clapw.org</p>
<p><u>DIRECTOR</u> SEATON, JULIA</p> <p>Julia.seaton@clapw.org</p>	<p><u>DIRECTOR</u> - VACANT</p>
<p>MCNEE BAKER, LISA, Executive Director 905-427-3300 ext. 237</p> <p>Lisa.mcnee-baker@clapw.org</p>	<p>Dana Sullivan, Administrative/Communications Asst. 905-427-3300 ext 236</p> <p>Dana.sullivan@clapw.org</p>

