

**REQUEST FOR
PROPOSALS (RFP)
FOR
STRATEGIC PLAN
CONSULTING SERVICES**

The closing date
for proposal submission
is March 4, 2024.

Jewish Family and Child Service
4600 Bathurst Street, First Floor
Toronto, Ontario M2R 3V3

Project Overview

Jewish Family and Child Service of Greater Toronto (JF&CS), founded in 1868, is embarking on a process to develop its new strategic plan for 2024-2030. We are seeking an experienced consultant or consultant team to design and facilitate a participatory strategic planning process with JF&CS's staff, Board of Directors, partners and stakeholders. The plan should build on our achievements and refine our strategic framework to respond to evolving community needs, as well as ensure the future sustainability of the organization. The work of the consultant(s), culminating in a range of plans and reports, will be supported and guided by a Strategic Plan Committee comprised of JF&CS Board and staff members.

Project timeline: March 2024 – Summer/Fall 2024 (flexible)

About JF&CS

[Jewish Family and Child Service](#) provides 30+ programs and services to both Jewish and non-Jewish community members of all ages at four locations (in downtown Toronto, North Toronto and Vaughan). Our primary purpose is to provide culturally-relevant, wrap-around supports and care within three priority areas:

- Increasing Safety and Security (e.g., Woman Abuse and Child Welfare)
- Reducing the Effects of Poverty (e.g., Housing, Financial Assistance and Poverty Reduction case management); and
- Improving Mental Health and Wellness (e.g., Group and Individual Counselling, Hospice, Bereavement services, and Chaplaincy)

Among our Safety and Security programs, we are the mandated Children's Aid Society for Jewish children and their families, within the GTA.

In 2022, we served approximately 14,743 clients.

Mission

A multi-service agency that strengthens and supports individuals, children, families, and communities by increasing safety and security, improving mental health and wellness, and reducing the effects of poverty, within the context of Jewish values.

Vision

A resilient community where hope, dignity, diversity and humanity thrive.

President: Sharon List, Board President

Operating Budget: \$24 million

Project Scope & Key Deliverables

The ultimate goal of the project is to develop a comprehensive five-year strategic plan and supporting documents for JF&CS to meet its goals within its financial and staffing capacity, as identified through a needs assessment and stakeholder input sessions.

In collaboration with the Strategic Plan Committee (including staff, management and Board members), the consultant(s) will develop a strategic planning process, including a project work plan with key milestones and timelines.

The successful consultant will:

- Create a **project work plan**, outlining the approach, methodology, key milestones and timeline for completing the project.
- Conduct **outreach with diverse stakeholders** (see “Outreach” and “Facilitation” below).
- Create a **comprehensive needs assessment / environmental scan report**.
- Create an **interim report** (midway through project) for review by the Strategic Plan Committee and the Board of Directors.
- Create a **5-year strategic plan** for JF&CS, including:
 - a mission, vision and values
 - strategic directions and priorities that will guide the organization over the next five years, including goals, objectives (using SMART goals) and benchmarks to evaluate success.
 - an understanding and optimization of the interplay between vision, financial sustainability, organizational capacity and impact to achieve strategic planning success.
 - key findings from JF&CS’ EDI work.
 - the alignment of a diverse range of stakeholders’ needs and goals for the organization, in partnership with the Strategic Plan Committee.
- Create an **implementation plan** for the approved Strategic Plan with activities, leads, timelines and metrics for measuring impact.
- Identify the **necessary resources needed to achieve the plan**.
- Create a **one-page dashboard** to support tracking progress on strategic initiatives, with identified metrics.
- Identify **key marketing and communications opportunities** connected to the Strategic Plan’s objectives.
- Identify **fundraising needs and opportunities** to support the Strategic Plan’s goals.

Outreach:

- Interviews, focus groups, surveys and other low-barrier methods to define potential strategic priorities and directions for JF&CS.

Outreach (continued):

- Engage service users and other key stakeholders, including: funders, community partners, community leaders, staff and donors.
- Prepare summary reports regarding stakeholder input (including **stakeholder feedback insights and SWOT analyses**).
- Consult with agency program managers and directors to develop relevant metrics/indicators to measure the success of the strategic plan and form part of the dashboard (mentioned below).

Facilitation:

- Facilitate meetings with the Strategic Plan Committee, and other appointed staff and Board members at key milestones of the work plan to discuss interpretation and insights.
- Facilitate at least 2 strategic planning sessions with the Board of Directors and Senior Leadership Team to review, discuss and finalize the plan.

This initiative is expected to take place over a period of 4 months, beginning in March 2024.

To Apply

Please submit a proposal of a maximum of 15 pages (not including CV or sample strategic plans) to rfp@ifandcs.com by 11:59 pm ET on March 4, 2024, that includes the following:

- **Consultancy profile:** A summary of the relevant history and expertise of the lead Consultant (and team members, if applicable), as pertains to the RFP. Further details may be included in an appendix.
- **Project team (if applicable):** A description of the roles and qualifications of all Consultant team members. Resumes/CV's for all Consultant personnel should be provided in an appendix.
- **Leadership and Innovation:** Examples of innovation and leadership in social services should be highlighted including the role of the Consultant (or any team members, if applicable). For example, highlight how you have incorporated EDI practices or performance metrics in past strategic plan work.
- **Project experience:** A summary of past projects (including examples) that are similar or in related fields with project values and the specific role of Consultant (and team members) in the project's success.
- **References:** Provide three client references for similar recent projects, and a brief description of services provided for each reference.
- **Proposal overview:** A summary of the issues and opportunities to be addressed through the Bidder's proposal, including the consultant's proposed approach to meet the RFP's stated objectives (see Project Scope & Key Deliverables, including Outreach and Facilitation).

- **Project schedule:** Detail the project milestones required, including a major task timetable. Additional and optional services and tasks are to be highlighted, if applicable. (See “Pricing details”).
- **Consultant and/or Project Team Time Allotment:** A table summarizing the members of the project team and the number of hours allotted for each team member per task. (See “Pricing details” should there be additional recommended tasks for the team).
- **Pricing details:** Provide a detailed costing table, including the following information:
 - Hourly billing rates, allocated staff hours and total fee for each task
 - Cost of any additional or proposed optional tasks considered outside of scope
 - Should any additional expenses be anticipated, please indicate the nature of the expense, and provide an estimated total

Evaluation Criteria:

Proposals will be evaluated using the following criteria and weighting:

- Relevant experience, capabilities and understanding of social services sector (of Consultant, and team members, if applicable): **25%**
- Proposal (completeness and clarity of proposal, proposed approach to project and deliverables, demonstrated ability to meet timelines and create measurable strategic plans): **50%**
- Pricing: **25%**

Response schedule:

Activity	Schedule
Issue of RFP Date	January 10, 2024
Deadline for Receipt of Questions	February 26, 2024
Closing Date	March 4, 2024
Interviews with Short-listed Consultants	March 12-15 Second round: March 19-22
Anticipated Contract Award	Week of March 25

Instructions to Bidders

Questions

All questions related to this Tender may be directed by email to rfp@jfundcs.com.

Receipt of Submissions

Proponents are required to submit proposals to rfp@jfundcs.com no later than 11:59 pm on March 4, **2024**. Proposal(s) received after the submission deadline will not be considered.

Interviews

An Evaluation Committee will review and assess all submission. A shortlist of candidates will be contacted for an interview. The interview will provide an opportunity to answer any queries and for consultants to highlight their unique strengths they bring to the work.

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, of a Proposal. JF&CS may reject or accept all or any part of a Proposal or Proposals submitted in response to this RFP.

Conflict of Interest

An employee or Board Member of JF&CS shall not have a direct or indirect interest in a company or own a company which provides services to JF&CS.

Right to Reissue RFP

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

Cost of Proposal

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

Amendment of Proposal

Applicants may amend Proposals prior to the March 4 deadline by submitting an amendment to rfp@jfundcs.com, with the subject line "Amendment of Proposal." Clearly identify the change or by submit a new Proposal, indicating such in the email. Amendments submitted after the deadline will not be considered.

Withdrawal of Proposal

Applicants may withdraw a Proposal submitted in response to this RFP by submitting a request to rfp@jfundcs.com, with the subject line "Withdrawal of Proposal."

Response to Proposal

All Applicants will be given written notice of the decision on their proposal (acceptance or dismissal). The successful applicant will receive a formal offer in writing to sign and return to rfp@jfundcs.com within 5 working days, failing which, the agency may cancel its acceptance and accept the Proposal or part Proposal of any other Applicant, or re-commence the RFP process.