



## **Request for Proposal Strategic Planning Consultant**

RFP Issue Date: **January 6<sup>th</sup>, 2022**  
RFP Closing Date & Time: **February 7<sup>th</sup>, 2022 at 5 pm**

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## 1.0 Invitation

TAIBU Community Health Centre (“TAIBU”) 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 TAIBU’s Board to produce a multi-year strategic plan.

## 2.0 About the TAIBU Community Health Centre

### Statement of Purpose:

TAIBU Community Health Centre is at the forefront of the delivery of community health and social services to Black communities across the Greater Toronto Area. Our work aims to improve, promote and protect the health and well-being for Black populations through quality and culturally designed primary health care services and strategies.

### Vision:

Achieving and maintaining health through community development, knowledge exchange, empowerment and the elimination of systemic racism and other forms of prejudice and discrimination in healthcare.

### Mission:

TAIBU Community Health Centre provides primary health care and related services for Black populations across the Greater Toronto Area as its priority population and residents of the local community of Malvern. Recognizing that systemic oppression has fostered conditions of ill-health with Black communities, we strive to deliver these services through intersectional, equity based and culturally affirming practices which promote holistic wellness, health education, and prevention.

### Values:

- **Leadership** – Leadership of Black communities is essential to provide sustained and equitable access to high quality primary health care services.
- **Community Driven** – We strive to be transparent and accountable to the communities we serve
- **Africentricity** – We recognize the rights of people of African descent to strive for self determination
- **Quality** – Our programs and services are evidence informed and reflect a high standard of quality

## 3.0 Services Required

### 3.1. Scope of Services and Deliverables

TAIBU’s last strategic plan was a 5-year term, from 2017-2022. The new strategic plan is expected to be launched at TAIBU’s September 2022 Annual General Meeting.

### Guiding Principles

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

- The planning will be rooted in Africentric values and principles.
- The planning will reflect TAIBU's Model of Black Health and Wellbeing.
- The planning will be guided by anti-racist and anti-oppression framework paying particular focus on anti-Black racism.
- The Consultant will develop the strategic plan within a context that incorporates a 10 Year Master Plan that will inform the reinforce TAIBU's foundational legacy and a definition and attainment of a Centre of Excellence.
- The process will be consultative with a variety of stakeholders which will inform the Board's decision making including but not limited to members of the Black community, current clients, staff and volunteers, partners and collaborators, funders etc.
- The process will use a strengths-based approach to strategic planning - Strengths, Opportunities, Aspirations, Results (SOAR).
- The Consultant will utilize fundamentals of 'design thinking' as a means of identifying opportunities for innovative and lasting value-adds for the communities served that are aligned with the mandate of the organization.
- The process will be transparent.

### Expectations

TAIBU has developed an approach to the strategic planning process based on past practices (see chart below). We welcome innovative ideas if the Consultant has a different way to achieve the deliverables/ outcomes below. It is our expectation that in addition to the deliverables indicated on the chart below, the Consultant will:

- Provide advice to the Board's Sustainability Committee.
- Embed anti-racist and anti-oppression framework into the planning process and into the strategic plan with particular focus on anti-Black racism

TAIBU staff will:

- Facilitate the scheduling and coordinating of meetings and recruitment for the key informant interviews.
- Facilitate and support the completion of online surveys.
- Communicate progress to the Sustainability Committee.
- Present progress to TAIBU's Board.
- Communicate and seek feedback from stakeholders to inform the final version of the strategic plan.

### PHASE 1: GATHER INFORMATION

Date	Work	Deliverable/ Outcome	Consultant Work	TAIBU Work
February 2022	Review relevant documentation and kick off meeting: <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Present work plan to the Sustainability Committee</li> <li>• Confirm critical dates/ check points</li> <li>• Discuss strategic planning process, get input from the Committee to move forward on the initial phases of work</li> <li>• Questions and answers</li> </ul>	<ul style="list-style-type: none"> <li>• Approval of the strategic planning process</li> </ul>	✓	✓

Date	Work	Deliverable/ Outcome	Consultant Work	TAIBU Work
March 2022	Environmental Scan: <ul style="list-style-type: none"> <li>With assistance and guidance from TAIBU staff, prepare an environmental scan on the current state and possible future state post pandemic</li> </ul>	<ul style="list-style-type: none"> <li>Environmental scan PowerPoint completed</li> </ul>	✓	✓
March 2022	SOAR Sessions: <ul style="list-style-type: none"> <li>Facilitate SOAR sessions with TAIBU's Board, TAIBU Leadership Team, staff, volunteers, members of TAIBU, clients, stakeholders, partners, funders etc.</li> </ul>	<ul style="list-style-type: none"> <li>SOAR sessions completed</li> </ul>	✓	✓
April 2022	<ul style="list-style-type: none"> <li>With input from the Sustainability Committee, Consultant to draft stakeholder surveys</li> <li>Conduct stakeholder surveys</li> <li>Produce a report from the surveys and identify themes</li> </ul>	<ul style="list-style-type: none"> <li>Survey developed and executed</li> </ul>	✓	✓
April 2022	<ul style="list-style-type: none"> <li>Conduct key informant interviews designated by TAIBU (partners, government and association decision-makers, funders)</li> </ul>	<ul style="list-style-type: none"> <li>Key informant interviews completed</li> </ul>	✓	
May 2022	<ul style="list-style-type: none"> <li>Conduct analysis and review of findings</li> </ul>	<ul style="list-style-type: none"> <li>Summarize and analyze the results from the surveys, key informant interviews, and planning sessions to identify potential priorities, objectives and outcomes in a 'Discussion Paper' for Board &amp; Staff engagement Session.</li> </ul>	✓	✓

## PHASE 2: ESTABLISH PRIORITIES

Date	Work	Deliverable/ Outcome	Consultant Work	TAIBU Work
May 2022	<ul style="list-style-type: none"> <li>Presentation of preliminary findings to TAIBU's Board,</li> </ul>	<ul style="list-style-type: none"> <li>PowerPoint on key themes,</li> </ul>	✓	

Date	Work	Deliverable/ Outcome	Consultant Work	TAIBU Work
	including input on current mission, vision and values • Board considers possible strategic priorities	opportunities, priorities etc.		
June 2022	• Board / Staff Engagement session • Facilitate discussion about potential priorities with a variety of stakeholders	• Additional input on priorities gathered	✓	✓

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

Date	Work	Deliverable/ Outcome	Consultant Work	TAIBU Work
June 2022	• Consolidate feedback on priorities and confirm • Board validates/refreshes mission and vision (if required) and identifies key areas for strategic directions	• PowerPoint with strategic priorities identified	✓	
July 2022	• Prepare draft strategic directions and plan	• Draft developed	✓	
July 2022	• 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	• Final strategic plan developed	✓	

### 3.2. Desired Skills and Experience

- Proven experience in strategic planning with the not-for-profit community and health care sector, including experience with conducting stakeholder consultations, gathering and analyzing data to inform decisions.
- Demonstrated experience in anti-racist and anti-oppression approaches.
- Demonstrated knowledge and experience of Africentric principles.
- Lived experience of anti-Black racism.
- Knowledgeable about strategic planning tools.
- Demonstrated experience in appreciative inquiry approaches.
- Familiarity with using the Strengths, Opportunities, Aspirations, Results (SOAR) approach in strategic planning.
- Familiarity with the fundamentals of 'design thinking'.
- Excellent facilitation and communication skills.
- Successful facilitation experience using virtual platforms.
- Understanding of primary and social care services an asset.
- Demonstrated understanding of health equity.

### 3.3. Reporting and Working Relationship

The successful Consultant will report to the Sustainability Committee and work closely with TAIBU's Executive Director and designated staff.

### 3.4. Timeline

The contract with the successful Consultant will begin approximately in February 2022 and be completed by July 31<sup>st</sup>, 2022. However, TAIBU is open to a shorter timeline based on the Consultant's expertise, but the project needs to be completed by July 2022.

## 4.0 Proposal Submission Guidelines

### 4.1. Communication after Issuance of RFP

The Client Representative is:

Executive Director

E-mail: [ed@taibuchc.ca](mailto:ed@taibuchc.ca)

Consultants are prohibited from contacting any staff or board member 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 TAIBU. It is inappropriate for the Consultant to initiate contact with any member of the RFP Evaluation Committee or any other staff or board members 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 or board members 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 5 <sup>th</sup> , 2022
Deadline for RFP inquiries	January 17 <sup>th</sup> at 5 pm
RFP closing date	January 21 <sup>st</sup> 2022
Award notification and contract signing with the successful Consultant	January 31 <sup>st</sup> , 2022

Note: TAIBU intends to adhere to this timetable but realizes that delays may occur. TAIBU 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.

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 format, using Microsoft Word or Adobe Acrobat:

- **one (1) proposal document (max 15 pages);** and
- **one (1) separate pricing document;**
- Additional documentation that speaks to the experience and skills of the Consultant are welcome and optional, however, these should be **separate documents**.

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	<ul style="list-style-type: none"><li>i. The full legal name of the Consultant.</li><li>ii. The business address, email address and telephone number for the Consultant.</li><li>iii. A short introduction of the Consultant including a brief description of experience providing similar services to other clients.</li><li>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.</li><li>v. The cover letter is to be <u>signed</u> by an authorized representative of the Consultant.</li><li>vi. A <u>clear statement</u> noting that the individual signing the proposal has the authority to bind the Consultant.</li></ul>
b. Workplan Approach	<ul style="list-style-type: none"><li>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"><li>➤ Tasks – including roles of the Consultant and Alliance staff</li><li>➤ Decision points</li><li>➤ Deliverables (including reports and key recommendations)</li><li>➤ Timelines</li></ul></li></ul>
c. Consultant experience	<ul style="list-style-type: none"><li>i. Provide details on your past 3 projects as they relate to the RFP requirements.</li><li>ii. Strategic planning experience.</li><li>iii. Knowledge and experience with the not-for profit and/or health sector.</li><li>iv. Experience with anti-racist, anti-oppression and health equity approaches.</li><li>v. Experience with appreciative inquiry approaches (SOAR).</li></ul>
d. Consultant Resume	The Consultant resume should demonstrate the required skills, experience and ability to deliver the services required in Section 3.

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

#### 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 TAIBU 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. TAIBU will make its best effort to issue addenda within a reasonable period of time.

#### 4.8. Clarification and Verification of Proposal

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

TAIBU reserves the right to verify any Consultant statement or claim by whatever means TAIBU deems appropriate and may reject any Consultant statement or claim, if in the judgment of TAIBU, 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**. TAIBU 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, TAIBU, 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 TAIBU, 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 TAIBU. 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**

TAIBU 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**

An evaluation committee will perform the following:

**Stage 1:** consists of validating that all mandatory submission requirements are included and complete according to **Section 4.4**.

**Stage 2:** consists of evaluating the work plan approach and knowledge and experience components of the proposal.

**Stage 3:** consists of evaluating the pricing information.

**Stage 4:** consists of interviews for Consultants who have successfully completed the stages above and have been invited for an interview.

**Stage 5:** consists of verifying reference information.

### **5.2. Evaluation Criteria**

<b>Stage</b>	<b>Evaluation Process</b>		<b>Points</b>	<b>Minimum Score</b>
1	<b>Mandatory Submission Requirements (Section 4.4)</b>		Pass / Fail	Pass
2	<b>Proposal Evaluation</b>			45 points
	Overall quality and completeness of proposal	5		
	Work Plan Approach	30		
	Experience with strategic planning	15		
	Knowledge and experience with the not-for profit and/or health sector	5		
	Experience with anti-racist, anti-oppression and health equity approaches	10		

Stage	Evaluation Process		Points	Minimum Score
	Experience with appreciative inquiry approaches (SOAR)	5		
	Consultant Resume	10		
3	<b>Price Evaluation</b>		10	n/a
4	<b>Interview Evaluation – if deemed necessary</b>		10	n/a
5	<b>References</b>		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:

(Lowest proposed price divided by the Consultant's submitted proposed price) X 10 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 TAIBU, 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.

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

TAIBU will make the award to the successful Consultant that can provide the best proposal for TAIBU. 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 TAIBU. 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, TAIBU 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 TAIBU

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

- Waive formalities and accept proposals that substantially comply with the requirements of this RFP;
- Waive irregularities in any Consultant's proposal;
- 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 TAIBU; and
- l) Reject any or all proposals in the absolute discretion of TAIBU.

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 TAIBU's rejection of any or all proposals, will render TAIBU and their respective affiliates liable for any costs, penalties or damages. The Consultant will not hold TAIBU and their respective affiliates liable for any error or omission in any part of this RFP. TAIBU 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 TAIBU. All material and information distributed will remain the property of TAIBU 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:

- a. there was no Conflict of Interest in preparing its submission; and
- b. 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:

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**Signature:**

\_\_\_\_\_  
Officer of the Company

\_\_\_\_\_  
Date

## Schedule B: Pricing Template

Consultants must prepare pricing using the following template below.

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 score calculation in **Section 5.3**.