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## REQUEST FOR PROPOSAL

RFP2021-01

### Strategic Planning - Request for Proposal

January 8, 2022

#### Objective

The Newmarket African Caribbean Canadian Association (NACCA) is seeking an experienced professional consultant to develop a comprehensive 5-year strategic plan for the organization that includes a significant focus on capacity building using a methodology effective for Black focused, Black serving organizations.

#### Background

NACCA is a Newmarket-based non-profit organization whose mission is to share and celebrate our stories— the stories that form the foundation of our collective history. The mission is lived through the delivery of inclusive and culturally informed programming. The organization is composed of Black activists and allies, business professionals, community organizers, artists, writers, and community members who are committed to amplifying the presence of Black history in Newmarket and beyond.

NACCA adopts a research-driven, anti-oppression and resisting anti-Black racism approach to community building that seeks to preserve and promote the historical, cultural, societal, and economic contributions made by Black peoples and their descendants to Newmarket, York Region, Ontario, and Canada. Through its initiatives, NACCA strives to build the capacity of Black youth (and families) to participate in leadership development and civic engagement.

In January 2021, Newmarket African Caribbean Canadian Association created a strategic framework with an action to further refine and define the focus, purpose and goals of the plan and guide the development of a robust multi-year strategic plan. As identified by input from the board, priorities are:

1. Mental Health
2. Building organizational capacity and sustainability
3. Youth
4. Advocacy & Engagement

Descriptive words for *who we are* as an organization and action words for *the work we do* are:

- Driven, support, supportive
- Connection, belonging, education
- Historical, reparative, empowerment

- Culture, community, networking, unity, unifying
- Community building, advocacy, meaningful, commitment
- Strengthening, authenticity, community engagement

In order to expand our organizational capacity, we are looking to undertake a structural review with support from a consulting expert in the field with specific expertise in the Black community as it relates to equity and inclusion. This review will help to build on our strong foundation to develop the way forward for NACCA to better serve our community. In so doing, we will engage in an executive visioning as part of the scope of developing a 5 year strategic plan that will achieve the following:

1. Refine and optimize organizational resources both human and structural.
2. Bring focus to existing initiatives and bring focus to those we will continue with.
3. Develop the financial plan and fundraising to provide a solid foundation for emerging priorities as determined through the visioning.
4. Develop Board capacity and committees to bring these goals to fruition.
5. Further develop a communications strategy to build on and increase the opportunity to engage with the community we serve, better understand their needs and increase our membership.

Through this focused activity, we will be prepared to meet the changing landscape and emerge from the pandemic with confidence, be current and relevant to the changing and emerging priorities of the Black community, developing our expertise and setting a pathway for others to follow. We will emerge with a vision for the community we will serve 5, 10 and 20 years from now.

## Scope of Work

1. A comprehensive community survey
2. Facilitated discussion through focus groups, information sessions, and interviews
3. Other methods as identified by the consultant
4. Review the current mission statement, make revisions if and as required through discussions, and review current core values
5. Facilitate planning meetings and public, board, membership and stakeholder input sessions. To include, but not limited to:
  - Initial kickoff
  - Midpoint summarization
  - Final report
6. Identify service priorities, goals, objectives, and activities that meet short and long-term community expectations.
7. Write and present the strategic plan that will be communicated to the Newmarket African Caribbean Canadian Association stakeholders.

The final deliverable should include:

- i. An up-to-date organization profile and organization chart
- ii. An assessment of the organization's environment, including evaluation of strengths and weaknesses, opportunities, quality of services, reputation, management, and budget, etc.
- iii. Clearly defined priorities, goals, and objectives that are achievable, measurable and for which NACCA will hold itself accountable.

*Budget estimate \$25, 000 CAD - \$30, 000 CAD*

## Proposal Content Requirements (maximum, 10 pages)

1. A cover letter providing a brief description of the firm or individual, name, address of consultant, telephone number, and email of principal contact person.
2. Executive summary of the highlights of the proposal conveying the consultant's understanding of the purpose and expected outcomes of the project, as well as the approach that would be employed to meet the requirements of the proposal.
3. A list of key personnel who would be involved in the process and their expertise/experience. If you plan to contract with a third-party vendor to conduct the community research component, please identify what firm you plan to use.
4. A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in non-profit operations that is Black-focused and Black-serving, as well as strategic planning experience.
5. A work plan that includes a description of the methodology, tasks, timeline, milestones and estimated total amount of time that would be spent on the project. Responses that fail to include a timeline will not be considered.
6. Exclusions or exceptions. Note any parts of the proposal that is beyond the expertise of the consultant (with any recommendations as to how this may be addressed).
7. A schedule of costs that includes consulting, supplies, number of onsite visits and cost per trip, and other costs associated with the planning process. Costs for data gathering and analysis (community research component) and/or community survey must be listed separately.
8. References and contact information for three organizations for which the facilitator has provided strategic planning services. One of the three references must be a B3 (Black-led, Black focused, Black serving) non-profit or charity.

## RFP Standards and Selection Criteria

1. The responding consultants bear sole risk and responsibility for costs incurred in the preparation of the proposal.
2. No NACCA board member shall have a financial interest in this proposal.
3. NACCA reserves the right to ask for clarification in the proposal if the need arises, and to select a planning consultant based directly on the proposal or to negotiate further with one or more respondents.
4. NACCA reserves the right to reject any or all responses to this RFP.

Selection of a proposal will be based on (but not solely limited to) the criteria provided and any other relevant information provided by the bidder at the time of the submission as well as any additional information provided during any subsequent correspondence with the bidder. The proposal will be evaluated by NACCA and will include the following criteria (70% is the pass):

### **Qualification and Experience (30%)**

- i. Demonstrated knowledge, skills, and experience in conducting strategic planning projects for Black-led community organizations.

### **Proposed Project Approach (30%)**

- ii. Methodology and timeline for carrying out tasks in the scope of work.

### **Pricing (20%)**

- iii. Ability to meet deadlines and operate within budget.
- iv. Cost to complete the process.

### **References (10%)**

- v. Positive experience and success in strategic and organization planning; satisfactory performance record.
- vi. **Interview** (10%)
- vii. Responses will be evaluated by the Strategic Planning Committee, who will present their recommendation to the Board. Interviews may also be scheduled as part of the process.

### RFP and Planning Process Timeline

1. Proposals must be received via email before 4:00 PM EST, Monday, January 24, 2022.
2. All questions must be received no later than 4:00 PM EST, Tuesday, January 18, 2022.
3. The Board or a Committee of the Board may schedule a virtual meeting with finalists prior to making their final decision.
4. Consulting firm selected and confirmed by February 24, 2022.
5. A draft report/plan and executive summary are to be submitted to the NACCA Board three weeks in advance of the final deliverable due date.
6. Final deliverable to be presented at the June 23, 2022 NACCA Board meeting.

**Further Instructions for Submission are Included in the Proposal Submission Instructions Document**