

J.W. MacIntosh Housing and Community Support Services

STRATEGIC PLANNING

REQUEST FOR PROPOSAL

A. Objective

The J.W. MacIntosh board of directors is seeking a consultant to develop an out-come driven strategic plan that directly support identified needs for our diverse community.

J.W. MacIntosh Community Support Services is a charitable organization providing a range of community support services to:

- Assist seniors, convalescents and adults with physical disabilities who reside in their own home.
- Promote independence.
- Prevent premature admissions to LTC facilities.
- Assist family and friends with their caregiving roles.

Programs include:

- Adult Day Program
- Caregiver Support
- Diner's Club
- Foot Care
- Going Home Program
- Health and Wellness Clinic
- Homemaking
- Meals on Wheels
- Respite Care (Community)
- Respite Care (Apartment)
- Supportive Housing/Assisted Living for High-Risk Seniors
- Transportation

J.W. MacIntosh Community Support Services currently services all of Dundas County.

Existing Partnership with Carefor (Homemaking and Going Home Program)

B. Deadline for Receipt

Proposals must be received via email before **4:00 p.m. on Monday June 12, 2023**. Proposals must be addressed to Peter Fitzpatrick, Executive Director, JW Macintosh Community Support Servicers and emailed to Peter.fitzpatrick@jwmaccss.ca .

C. Inquiries

Please address all inquiries via email to peter.fitzpatrick@jwmaccss.ca.

D. Background

The Williamsburg Non For-Profit Housing Corporation was founded in 1983. Later renamed J.W. MacIntosh Community Support Services. The charitable organization is serving unique rural communities in the SD&G community with very diverse needs juggling its affordable seniors housing needs with its in home aging in place community needs. Learn more on the organization via: <https://jwmaccss.ca/>.

E. Scope of Work

J.W MacIntosh is seeking an experienced professional facilitator to perform the following:

1. Facilitate one or more sessions with the Board of Directors, staff, partners and community to refresh the JW's vision, mission, values, goals and objectives.
2. Facilitate the strategic planning process. Work with the Board of Directors and staff to gather data through research and community input to identify how the JW's values and purpose can be aligned with the JW's Official priorities, needs of the community to the basis of the JW's strategic focus capturing the next 5 years starting January 2024.
3. Community engagement is a key component of this planning process, and may include:
 - a) Focus groups / public input sessions / individual reviews;
 - b) Paper / online survey;
 - c) Priority validation follow-up interviews with board and management;
 - d) Review survey results and conduct a SWOT analysis with the Board and Senior Managers;
 - e) Other methods as identified by the consultant;
5. Oversee the development of the strategic plan that will be communicated to the JW's board, staff, partners, funders, and clients. The final deliverable will include specification of the JW's purpose, values and core services as well as clearly defined areas of strategic focus.
6. All raw and summary data is to be delivered to the J.W. MacIntosh at the conclusion of the planning process.

F. Proposal Content Requirements

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, not to exceed one page in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
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 municipal operations, services, trends and functions as well as strategic planning experience.
5. A work plan that includes a description of the methodology, tasks, timeline 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 or would be better handled with the support of JW's staff.

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) must be listed separately.

G. RFP Standards and Selection Criteria

1. The J.W. MacIntosh reserves the right to cancel the award of contract at anytime before the execution of the contract by both parties. The responding consultants bear the sole risk and responsibility for incurred in the preparation of the proposal.

2. No board members or existing partner agencies shall have a financial interest in this proposal.

3. In cases of dispute over differences of opinions as to the services of the proposal, the decision of the J.W. MacIntosh shall be final.

4. The J.W. MacIntosh reserves the right to ask for clarification of the proposal if the need arises, and to select a planning consultant based directly of the proposal or to negotiate further with one or more respondents.

5. The J.W. MacIntosh reserves the right to reject any or all responses to the Request for Proposal.

6. The proposal will be evaluated by the J.W. MacIntosh and will include the following criteria:

- a) Responsiveness of the written proposal to the purpose and scope of the project.
- b) Demonstrating knowledge of the organization, skills to deliver quality strategic plan and experience in conducting strategic planning project.
- c) Methodology and timeline for carrying out tasks in the scope of work.
- d) Cost to complete the process.
- e) Ability to meet deadlines and operate within budget.
- f) Positive experience and success in strategic planning (references if requested).

H. RFP and Tentative Planning Process Timeline

1. Proposals must be received via email before 4:00 p.m. on Monday June 12, 2023.

2. Proposals will be reviewed by end of June 2023 at the latest.

3. Strategic planning process may begin as early as possible in agreement with the consulting firm chosen.