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Request for Proposals Strategic Planning Consultant

Posting date: Friday April 6th, 2018

Proposal submission deadline: Tuesday, April 17th, 2018

Purpose:

MAX Ottawa is seeking proposals from qualified consultants to develop a three-year strategic plan for the Board of Directors to steer our organization's evolution and strategic directions during 2018-2021. The strategic planning consultant will work with the Strategic Planning Committee, comprised of Board Directors, staff, and volunteers and supported by the Ontario Organizational Development Program (OODP). The objectives of this contract are to consult community members and key informants and analyze their input, analyze findings of recent reports pertinent to our work, and write the final Strategic Plan document.

Milestones:

- **April 2018:** Strategic Planning Consultant on-boarded
- **May-August 2018:** Environmental scan and document review
- **September 2018:** Analyze the findings of the environmental scan and document review
- **October 2018:** Findings presented at the Board's Retreat;
- **November- December 2018:** Strategic plan drafted, reviewed, and approved;

Fees: The resulting contract for strategic planning services cannot exceed a determined budget. The fee proposal must include services, touchpoints with board, staff, and stakeholders, costs and all incidentals including travel costs and GST/HST. Proposals should not exceed **CAD \$20,000**. MAX will source and manage costs associated with the process (venue bookings, refreshments, supplies, graphic design, and printing).

Services: The consultant will perform a comprehensive community assessment as well as review existing reports to inform the strategic planning process. Stakeholders to be assessed will include MAX Board members, staff, volunteers, community members, funders, and other key informants. The consultant will attend the Strategic Planning Committee meetings.

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The deliverables from the consultant's work shall be:

- Findings Analysis Presentation
- Strategic Plan

Assessment Criteria: Responses to this RFP will undergo an initial evaluation by the Chair and Executive Director who will then present to the Strategic Planning Committee for consideration. Preference will be given to consultants who have prior experience working with non-profit organizations, particularly those serving GBT2Q men. MAX reserves the right to evaluate proposals received against criteria not included within the agreed requirements and specifications. As a guide, in addition to compliance with the requirements set out within this document, the following criteria will form a part of our evaluation:

- Consultant's approach to the RFP process, including understanding of scope and requirement and value generated
- Relevant experience, including prior strategic planning with similar organizations
- Pricing and ability to deliver according to timeline
- Capability of working in both official languages is an important asset

MAX Rights and Assumptions

- All responses provided may, at MAX's discretion, form part of any terms of acceptance with the successful consultant and be included in any future contracts with the consultant in relation to this RFP.
- MAX reserves the right to request and approach references.
- MAX reserves the right to reject any or all responses to this Request for Proposal.
- All costs for preparing and submitting your proposal are to be borne by consultant. MAX accepts no obligations to reimburse any consultant for any costs associated with preparing and/or submitting a proposal whether or not the consultant is selected.
- MAX reserves the right to ask for clarification in the proposal if the need arises.
- The decision to accept or reject your proposal shall be entirely at MAX's sole discretion. Any decision to reject a bid shall be final.

Any consultant who is found to be breaking ethical standards at any time shall be disqualified.

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RFP Response Please submit your proposal by the submission deadline in a word or PDF format

via email to:

Roberto Ortiz, Executive Director, MAX Ottawa

Email: roberto@maxottawa.ca

Subject Line: MAX Strategic Planning RFP Submission

Please ensure that the proposal includes the following:

- A cover letter that includes the responding company name, address, and contact information Proposal of services with a preliminary project timeline
- Experience and number of years working with the LGBT2Q or non-profit sector
- Proposal fees including unit costs for project components
- Names of individuals who will be performing the work under this contract and credentials and resumes for these individuals
- A minimum of 2 references
- Consultant Services Contract, if available

If consultant wishes to provide additional information that has not been requested but is relevant to a particular component, please include that information with your proposal. Please do not include generic marketing documentation

About MAX Ottawa:

MAX (formerly the Ottawa Gay Men's Wellness Initiative - OGMWI) is a community based-organisation that envisions a community of self-affirming gay, bisexual, two-spirit, queer, and other guys who are into guys, whether cis or trans (GBT2Q) caring for ourselves, caring for each other, and enjoying complete health equity.

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