



ADVANCING EXCELLENCE IN EVALUATION

**CANADIAN EVALUATION SOCIETY
ONTARIO CHAPTER**

**Request for Proposals
Integrated Strategic-Operational Plan**

Deadline: February 21st 2018 @ 12:00pm EST

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Background

The Canadian Evaluation Society – Ontario Chapter (CES-ON) www.evaluationontario.ca is one of the largest Provincial chapters of the Canadian Evaluation Society (CES), a not-for-profit, national, professional association of evaluators committed to advancing evaluation theory, knowledge and practice through leadership, advocacy and professional development.

CES-ON has over 375 members. The membership of the CES-ON represents different sectors including the provincial and municipal governments, non-profit organizations, health care and social service agencies, school boards, colleges and universities, and private sector consultants.

CES-ON is guided by its vision (to enhance the recognition of evaluation as a valued and respected profession necessary for the well-being of all Canadians) and mission (to support evaluation and its practitioners in the public, private and not-for-profit sectors in Ontario through professional development, standards, member support, education and the promotional activities).

CES-ON provides value to its members by:

- Creating a community of practice and facilitating networking within the evaluation profession.
- Promoting awareness of evaluation and of the value that evaluation can add to government and business.
- Advocating the use of evaluation through direct contact with political and business decision makers.
- Disseminating knowledge about quality evaluation through training and professional development opportunities.
- Supporting research in evaluation.
- Supporting students and new practitioners (recent graduates, up to two years post-training)

Project Scope

CES-ON is seeking an Ontario-based vendor (consultant/firm) to facilitate an integrated strategic-operational planning process that will provide guidance on the future decision-making and continuous improvement of the organization. In close collaboration with the CES-ON Board, the successful proponent will synthesize an integrated strategic-operational plan (ISOP) that will include:

- a renewal of the organizational vision, mission and core values;
- that will support CES-ON in fulfilling its mission and vision;
- that will anchor CES-ON in a sustainable framework to support its objectives and identified outcomes, and;
- that will flexibly allow for CES-ON to remain current, responsive, and nimble to national/international evaluation agendas and opportunities, in the face of internal and external shift and challenges.

The ISOP will include long-term goals and short-term objectives that not only reflect the current social and economic landscape of evaluation regionally, nationally, and internationally, but also leverage internal organizational capacity and strengths, and anticipate the challenges CES-ON will face in the future. The plan should also consider creative and sustainable strategies for growing internal CES-ON capacity (e.g., infrastructure, systems, human resources) to strategically and effectively support organizational long-term goals and operations.

The vendor will be responsible for providing expert advice and facilitation throughout the project, while being responsive to CES-ON Board identified priorities and the following key deliverables:

- Assist the organization in its next integrated planning cycle, and ultimately, in the development of a comprehensive and sustainable integrated strategic-operational plan (ISOP) to anchor and guide CES-ON activities over the next five (5) years.
- Identify a critical path with relevant timeframes for the development of the integrated strategic-operational plan.
- Facilitate planning sessions to map out CES-ON's future.
- Design an effective method for data gathering, synthesis, and presentation, including document review, online surveys, focus groups, and stakeholder meetings.
- Guide all stages of the integrated planning process, including meetings with CES-ON Board, association members, staff, and key external stakeholders.
- Assist in a review of CES-ON's vision, mission, goals and objectives.
- Conduct an analysis of CES-ON's offerings/services within a broader SWOT and PESTLE.
- Review past outcomes, successes, planned/unplanned opportunities.
- Conduct an environmental scan, trends, context, including a review of strategic plans/offerings from similar associations/societies (nationally and internationally) and stock-taking of assets, stakeholders and emerging opportunities (legislation, budget, leadership).
- Identify gaps between current industry needs, organizational resources, organizational facilities, and staffing and the identified vision, mission, goals and objectives generated through the process.
- Include a monitoring framework for reporting and evaluating progress against the integrated strategic-operational plan objectives.
- Align the organization's future operational objectives to support proposed vision, mission, goals and objectives, such as (but not limited to):
 - board and member support;
 - human resources (staffing, size, positions, skills);
 - technical and/or capital resources to run the organization effectively;
 - third-party consultant needs;
 - branding and marketing; and
 - diversifying revenue sources.
- Ensure that the plan also:
 - integrates building brand awareness of the CES-ON and its offerings through increased market presence;
 - raises the profile of CES-ON courses, programs, and offerings;
 - considers how to broaden marketing communications media beyond social media and outlines key partnerships needed to enhance value of CES-ON membership;
 - outlines a comprehensive collateral plan; and
 - includes a refined brand and membership message for target audiences.

- The final plan must consider both strategic and tactical/operational elements and present an execution plan that includes objectives, recommended tactics, timing/timeframes, budgets, and key points for responsibility.
- Develop an associated presentation (strategic highlights) suitable for public review and stakeholder validation.

The consultant will report directly to the CES-ON Executive Committee. The consultant can expect that CES-ON will assist in the logistics related to planning for stakeholder meetings and CES-ON admin will be available to provide meeting facilitation support. CES-ON will make available to the selected vendor the previous strategic plan (2012), progress documentation, and member survey data from 2012 and 2016-17.

Schedule

The following is a planned schedule. Depending upon the number of proposals, intended completion dates may change.

| <i>Date</i> | <i>Deliverable</i> |
|--------------------------------|---|
| January 31 th 2018 | Call for Request for Proposal (RFP) |
| February 21 st 2018 | RFPs due at 12:00 pm EST |
| March 19 th , 2018 | Review of proposals complete and successful candidate notified |
| May 15 rd 2018 | Draft of the strategic highlights presentation (for review and approval by members) |
| May 31 st 2018 | Draft of strategic - operational plan |
| June 30 th 2018 | Final integrated strategic – operational plan |

Bidders' Qualifications

It is expected that the successful firm will be based in Ontario, Canada and have:

- Demonstrable recent experience and understanding of the non-profit sector.
- Extensive strategic and operational planning experience
- Experience coordinating and facilitating planning processes that result in comprehensive and sustainable integrated strategic-operational frameworks.
- Business planning and financial analytics experience and background.
- Relevant academic/ industry qualifications.
- A background in evaluation and/or Credentialed Evaluator (CE) designation is a plus.

Proposal Quality

Proposals should highlight:

- Demonstrated knowledge of organizational effectiveness, continuous quality improvement, and efficiency in volunteer/ not for profit boards.
- Demonstrated experience in organizational development and enhanced performance.
- Relevant experience and success in strategic-operational planning facilitation, including the level of satisfaction of current and past clients.
- Adequacy of approach and methodology.

- Completeness of the proposal.

Submission Requirements

Please submit a proposal that complies with the following:

1. Understanding of project scope
2. Approach and methodology
3. Vendor profile
4. Project team
5. Company and team experience
6. References and work sample (if available)
7. Workplan and Budget
8. Team CVs (appendix)

Responses to this call for proposal submission should be addressed to the CES-ON sent electronically by PDF **February 21st 2018, by 12:00 p.m. (Eastern Standard Time)** to rfp@evaluationontario.ca.

Budget

The funding for this project is limited to **\$20,000-25,000 CAD** (inclusive of GST/HST) inclusive of all expenses (travel may be approved on an as needed basis and requires approval in advance of travel dates). Bids in excess of this amount will be considered non-responsive. The payment schedule for the project will include:

- 25% upon receipt of proposed workplan;
- 50% upon receipt of the draft strategic-operational plan; and
- 25% upon receipt of the final integrated strategic-operational report.

Communication

Prospective bidders may approach Roxana Vernescu, Vice-President, CES-ON about this project. The questions should be submitted in writing via e-mail, no later than February 14th 2018, to: rfp@evaluationontario.ca.

The goal is to answer each question within two working days of its receipt. The answers to questions will be distributed to all bidders who have informed the Vice-President, CES-ON of their intent to make submissions. Questions and Answers will also be posted via the website www.evaluationontario.ca.

General Conditions

Right to Amend RFP

CES-ON reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all proponents through the CES-ON website.

Bidder Incurred Costs

All costs incurred in the preparation and presentation of proposals in any way whatsoever shall be wholly absorbed by the bidder(s).

Indemnity

The bidder(s) will indemnify and save harmless CES-ON from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained, done or omitted by CES-ON at any time before or following termination of the agreement.

Acceptance of Proposals

CES-ON is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in light of the evaluation criteria specified above.

Evaluation of Proposals

At least three (3) members of the CES-ON Board will evaluate all complete proposals. The right is reserved to make an award based directly on the proposals submitted or to negotiate further with one or more proponents.

Ownership

The proposal shall be the property of the CES-ON and shall not be published or released without the written consent of CES-ON.