



Request for Proposal: HCSS Strategic Planning Process

Date: April 12, 2022

Dear Consultant Candidate,

Background:

Home and Community Support Services Grey Bruce (HCSS-GB) is a Community Support Services (CSS) agency that serves the adult population of Grey and Bruce Counties. We are the areas "lead" CSS agency, handling a central intake system, as well as many of our own programs: day away program, overnight respite, volunteer and accessible transportation, friendly visiting, hot and frozen meals on wheels, housekeeping and bundled care. CSS is under enormous funding pressures, as well as capacity constraints, and we are looking for this plan to help guide our work over the next 3-5 years. For more details, visit our website at www.hcssgreybruce.com Funding sources include:

Project Overview:

We are seeking a consultant to lead HCSS-GB in a project which has three components. Each of these components is outlined below:

1. To Complete a workplan to guide the Strategic Planning Process

HCSS Grey Bruce would like to have an updated strategic plan to work on. Our last strategic plan, attached to this RFP, still has some factors that are relevant, but many have changed. Our goal is to have this new strategic plan for board approval by late fall 2022.

Primary objectives:

- Meet with Board, Future Directions board staff-committee and engagement committee to review work done so far and next steps. Help guide formation of staff committee of interested staff members. Review organization history
- Review with ED and senior directors and the committee's last strategic plan, as well as priorities met, not met and competing priorities over the past few years.
- Set out a timeline and work plan along with targets to ensure HCSS-GB remains on time.
- Work directly with Executive Director and senior directors to prepare timelines for presentation to board and committees.
- High level overview of financials and discussion of CSS system pressures:

Timeline:

- Spring-Summer 2022

2. Facilitation and Engagement

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Telephone: 519-372-2091
Toll Free: 1-800-267-3798

Unit G-12 Heritage Place Mall
1350 16th Street, Owen Sound N4K 6N7

Email: mailbox@hcssgreybruce.com
Website: hcssgreybruce.com



To help HCSS-GB envision their mission, vision and values through facilitation of staff and board. Review engagement plan for other partners, including healthcare, social services, corporate, donors, clients and volunteers.

Deliverables for Part 2:

- Support development of mission, vision and values through a facilitated session at AGM in June (in person, virtual or combination)
- Review stakeholder mapping group – already underway
- Review and provide feedback on development of list of key questions, tools and methods of stakeholder feedback
- Help co-ordinate data and feedback from stakeholders

Primary Objective:

- Facilitate high priority groups including staff and board and support engagement of other groups including volunteers, clients and partners

Timeline:

- Summer 2022

3. Help develop the plan

Based off facilitation with staff, and engagement processes, support the creation of strategic planning priorities

Deliverables for Part 3

- Review with staff and board groups the strategic priorities arising from engagement and facilitation processes
- Develop supporting objectives (implementation plan)
- Develop an overview and finished draft plan to present to full board, including monitoring plan and key metrics/success indicators

Primary Overview

- Develop draft plan to present to board, that can be updated, monitored and measured

Timeline

- Fall 2022

Total Budget: \$15,000

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RFP: HCSS-GB Strategic Planning Process

Please complete the below information by April 29th, along with a resume and list of previous clients/references, and return to smusehl@hcssgreybruce.com. Final review will take place the first week of May, followed by potential request for presentation from the consultant. Hopeful to start process by mid-May. If interested, but need more time, please let Stephen Musehl at smusehl@hcssgreybruce.com know.

Submission Requirements:

Organization/Consultant	
Contact Name	
Email	
Phone	

Please describe your approach to the following RFP requirements:

- 1. Work break down and timeline**
- 2. Process of engagement**
(e.g. facilitated sessions, small group discussions, large group take-ups, pre-work ahead of sessions, ensure all voices are heard and that a few voices do not dominate, use of polling, jam board etc.)
- 3. Break down of costs**

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