



United Way
Bruce Grey

United Way of Bruce Grey

Request for Strategic Planning Consultation Services

Deadline December 1st 2017

Background

The United Way of Bruce Grey is an important community agency that seeks to meet “unmet needs in Bruce and Grey Counties by mobilizing volunteer and financial resources in the common cause of caring”.

As the United Way enters its 20th year of operation, it is seeking to update its strategic directions.

Scope of Work

The United Way of Bruce Grey is seeking proposals from qualified consultants/firms to assist in the development of a new comprehensive strategic plan which will guide the organization over the next five (5) years. The successful proponent must have extensive strategic planning experience, including the ability to conduct all required research, coordinate and facilitate the planning process, and internal/external stakeholder interviews and create a strategic planning document that is measurable and suitable for public review and presentations. An integral part of the planning process is to facilitate the understanding of the process by the Board of Directors and its consequences to the Board as they will be responsible for implementing the plan, assessing its success on an annual basis and adjusting the plan to incorporate learning.

The Strategic Plan proposal should include methods for establishing key strategic objectives/ directions including but not limited to:

- A comprehensive environmental scan
- 15-20 key informant interviews/focus groups
- A review of relevant documents
- **A review of community granting process, priorities and mechanics**
- Board facilitation
- Review of all pertinent information gathered.

The Plan should also include actions to enhance the success of the long-term strategies. The Strategic Plan should include a summary of critical issues facing The United Way in its effort to meet the goals set forth in the plan, as well as available resources that can be utilized.

Specifically, the consultant will be responsible for providing expert advice and facilitation throughout the project, and for the following deliverables, at minimum:

- The proposal should include a “phased in” approach (immediate 6 months to 1 year/short term 1-2 years/medium term 2-4 years/and long term 4-5 years)
- **Objectives should be measurable and align with phased in time frames**

- Project Coordination, including regular meetings and status reports to keep the project on schedule and keep key stakeholders updated on the process
- Community, donor, funded agency and employee input, including gathering of key stakeholder assessment and recommendations as well as using appropriate methods of communication and engagement
- Needs assessment / environmental scan – reviewing existing plans and documents pertinent to the comprehensive strategic plan, identifying trends and patterns that are applicable, analyzing strengths, weaknesses, opportunities and threats
- Process and meeting facilitation; assisting discussion and decision making and ensuring that conversations are progressive and innovative, and oriented towards creating a shared future
- Planning, coordinating, and taking minutes of all meetings, including community/ stakeholder consultation sessions and meetings with the Board of Directors
- Plan documentation, including development of an interim and final report for the project, including executive summary
- The project will be expected to be completed within a timeframe of 3 months from the start of the contract.

Applicants responding to this RFP may not have any personal or business interest that would present an actual, potential or apparent conflict of interest with the performance of the contract to be awarded.

Proposals can be emailed to execdir@unitedwaybg.com or dropped off at the United Way:

380 9th Street East Owen Sound Sound

For more information please contact Francesca Dobbyn Executive Director at 519-376-1560

Deadline for proposals is December 1st 2017