

## REQUEST FOR PROPOSALS

### Strategic Plan Update

**Closing Date: MONDAY, JULY 29, 2019 Time: 4 p.m. MST**

Response Submission Contact:  
**Dana Seiffert, Executive Assistant**

The Calgary Drop-In & Rehab Centre  
#1 Dermot Baldwin Way SE  
T2G 0P8  
Calgary, AB

Email: [danas@thedi.ca](mailto:danas@thedi.ca)

## STATEMENT OF PURPOSE

Calgary Drop-In Centre (the DI) is seeking proposals from qualified consultants and/or consulting firms to assist in the development of a three-year strategic plan that will focus on the organization's values, services and vision for the future.

## KEY DATES SUMMARY

The proposed length of the contract is no longer than four (4) months.

1. **Questions** from service providers are due by **Tuesday, July 23, 2019**
2. **Responses** to questions will be provided by **Friday, July 26, 2019**
3. **Final proposals** must be received by no later than **4 p.m. MST on Monday, July 29, 2019**. Strict adherence to this closing date will be maintained, and all proposals received after this time and date will not be opened or read.
4. Short-listed applicants will be invited to the Calgary Drop-In Centre for an interview between **Monday, August 5 and Friday, August 9, 2019**.
5. The contract will be **awarded** no later than **Monday, August 12, 2019**, with a project run time of between **August 12, 2019, and November 29, 2019**.
6. The final consultant report will be due **Friday, November 29, 2019**.

## KEY CONTACT

Questions and proposals should be submitted via email to:

Dana Seiffert  
Executive Assistant  
[danas@thedi.ca](mailto:danas@thedi.ca)

## DISCLAIMER

This Request for Proposal does not constitute a guarantee on the part of the DI that a contract will be awarded. All costs incurred in the preparation and submission of a Proposal in response to this Request for Proposal will be assumed by the service provider.

## **1.0 BACKGROUND**

The Calgary Drop-In Centre (the DI) is more than an emergency shelter. We provide essential care as well as health services, employment training, and housing supports to people who need help. Our programs and services connect people to permanent housing that meets their individual needs. The DI proudly serves as part of the Homeless-Serving System of Care.

With an annual operating budget approaching \$25M and assets in the \$70M range, the agency is a housing-focused organization and has pledged to end chronic homelessness in our facility.

The DI is a low-barrier emergency shelter operating 24-hours a day, 365 days a year for access to employment training, health support, emergency help and assisting with housing plans. Currently, an average of approximately 750 people shelter with us each night. We offer client-centered programs and services aimed to help people access appropriate and permanent housing with the goal to sustain independent living. These include health services, community resources, employment skills training, case management and housing guidance. We do this with approximately 250 Staff members and tens of thousands of hours of volunteer time.

For the last decade, we have owned and managed some 150 units of housing, of which, roughly 75 are managed as affordable inventory. We are about to begin welcoming tenants in our third housing initiative, which also will operate on a mixed affordable/near-market model and add a further 79 units. By the end of 2019, in collaboration and coordinating with many other homeless services organizations, the DI's goal is to connect a further 200 long-term shelter stayers to sustainable housing in the community.

## **2.0 STRATEGIC ALIGNMENT**

Rooted in community and fueled by kindness, the DI is deeply invested and committed to working in collaboration with community partners and ending chronic homelessness at the DI and optimizing emergency shelter.

Moving forward, our approach must also recognize the systemic factors which exacerbate vulnerability, at a policy level, rather than solely looking at challenges at an individual level.

## **3.0 REQUIREMENTS**

Calgary Drop-In Centre is seeking proposals from qualified consultants and/or consulting firms to assist in the development of a three-year strategic plan that will focus on the organization's values, services and vision for the future.

The Board of Directors has agreed, that while much is appropriate and relevant in the existing the DI Strategic Plan, an update of the strategy is timely to adjust in concert with changes both in the internal and external environments. Substantial progress on the four action areas of the existing plan has been made in the three intervening years since its launch.

The successful candidate, in consultation with the Board and our key stakeholders, will use the existing plans as a base to prepare a plan which would map out the strategic direction for the DI for the next three years.

Our stakeholders include the Board of Directors, staff, clients, donors, funders and community partners.

### 3.2 CONTRACT AWARD

The contract will be awarded to the most responsive service provider whose offer will be the most advantageous to the DI in terms of cost, suitability, readiness, availability, local support, flexibility and other material factors as may be identified.

The DI reserves the right to:

- reject any or all offers and discontinue this RFP process without obligation or liability to any potential service provider;
- accept any proposal other than the lowest priced offer; and
- award a contract based on initial offers received, without discussions or requests for best and final offers.

The awarding of the contract is subject to the DI securing the necessary funding.

### 3.3 SCOPE OF WORK

The consultant shall, at a minimum, accomplish the following:

Planning Activity and Final Deliverable

1. Review documents associated with the previous strategic planning cycle and understand the baseline of 'current state' of the DI Operations (previous strategic and other plan materials will be provided as background information upon request.)
2. Design and execute a strategic visioning and planning process including consultation with the DI Board of Directors, staff, donors, funders, users of DI services and key community partners
3. Develop a three-year strategic plan
4. Develop recommendations regarding the plan's implementation and support structure

### 3.4 ANTICIPATED APPROACH

A nimble approach, able to adapt quickly to what is found, rather than sticking fast to a proscribed methodology is desired. It is anticipated that the plan will be updated through a combination of activities, such as:

- Review and present available related data and stakeholder strategic plans as well as any relevant research and best practices
- Focus groups, interviews, and/or any other method that will be useful in receiving stakeholder and community input
- Facilitated group meetings with DI contributors using strawman options rather than creating from a blank slate, to reach consensus regarding a strategic plan (including goals, objectives, strategies, and tactics)
- Regular communication (every three weeks is suggested) via phone and/or email with the Strategic Planning Committee to provide updates

### 3.5 DELIVERABLES

The DI seeks the consultant's presentation and recommendations of an actionable strategic plan to be developed using the current plan as a starting point.

1. **Vision and key Strategic Direction and goals:** This stage includes consensus building among the key contributors to:

- a) Confirm that the current strategic vision and mission:
  - Is still relevant
  - Is clearly stated
  - Is compelling
  - Is timely
  - Describes a clear and present need
  - Motivates people to act
  - Is a worthwhile challenge
  - Is audacious
- b) Identify key strategic directions and goals after consultation with clients, Board of Directors, staff, donors, funders and key community partners. This stage should produce the substantive documentation and solutions needed for informing the strategic planning process.

2. **Write the strategic plan:** This plan will serve as the overall blueprint for the DI’s action plans for the next three years. This plan should include:

- An executive summary of the main findings, including key recommendations
- A detailed plan that identifies:
  - Vision & Mission
  - Key Strategic Directions / Pillars
  - Goals and Objectives
  - Stakeholders and their roles
  - Desired Outcomes
  - Success Measures
- Supplementary information should include:
  - Strategic areas of focus and service priorities for the next three years
  - Services and programs (both current and new) that will support goals, including potential external partnerships
  - Key Risks associated with the recommended strategy that will need to be actively managed

### 3.6 CONSULTANT QUALIFICATIONS

To deliver the plan as outlined, the successful consultant will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Knowledgeable of the non-profit sector and issues
- Knowledge of the current homeless-serving system of care
- Strong facilitation skills and experience creating a neutral environment for and soliciting input from multiple stakeholders across various sectors
- Research methodology that includes the use of, but is not limited to:
  - Market research
  - Public consultation
  - Experience gathering and utilizing data to inform the strategic planning process
  - Statistical analysis

## **4.0 PROPOSAL**

The consultant understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, fax number and email address for each person engaged in scope activities and the case of a firm submitting a proposal, confirm that the person(s) assigned this project, assuming successful selection, possess the relevant skills and experience requested.

The successful consultant will be directly accountable to the Strategic Planning Committee, which includes the Board Chair and Executive Director.

Proposals must include the following:

### **1. Work Plan**

- A detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:
  - The specific activities to be conducted at each stage
  - A timeline for the activities at each stage
  - Milestones and deliverables tied to those activities

### **2. Budget**

- The overall budget should be appropriate for a non-profit organization.

### **3. References**

- The proposal should include three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address.

## **4.1 EVALUATIONS**

Consultants may be asked to participate in an interview to further gauge their fit and ability to work on this project. If needed, interviews will be scheduled to take place between August 5 and 9, 2019.

Consultant selection will be based on the consultant's written proposal and the results of reference checks.

## **4.2 ALTERATIONS AND/OR MISREPRESENTATIONS**

Except as otherwise provided herein, proposals which are incomplete, contain alterations or items not called for in this RFP, or which are not in conformity with the law, will be rejected as non-responsive.

Additionally, a service provider shall not misrepresent its ability to provide the services as indicated herein or its proposal prices. Misrepresentation may be cause for rejection of the proposal.

## **5.0 CONFIDENTIALITY**

All information relating to the DI, which is made known to the service provider in the process of bidding, its agents or employees in the course of providing service to the DI, shall remain confidential to all parties. The RFP process in its entirety shall also remain confidential to all parties. The bidding service provider, its agents and employees shall abide by all applicable Provincial and Federal laws and regulations concerning the handling and disclosure of private and confidential information.

## **6.0 CONFLICT OF INTEREST**

The bidding service provider must not engage in any activity where such activity creates a conflict of interest that compromises or could be seen to compromise, the integrity or competitiveness of this RFP process. Further to this, any contract awarded to a service provider will be done in good faith that the service provider is not acting within any conflict of interests unless otherwise disclosed.

## **7.0 OWNERSHIP**

All data, documentation, information, notes, completed questionnaires, reports, analyses, intellectual property or other material produced for or in conjunction with, created because of, or otherwise associated with the DI and the services to be provided under this RFP and the contract made hereafter, shall remain the property of the DI.