



## REQUEST FOR PROPOSAL TO SUPPORT A STRATEGIC PLANNING PROCESS

### I. General Information

<b>Project Objective:</b>	To develop a 3 year Strategic Plan.
<b>Issuing organization:</b>	Quest Community Health Centre 145 Queenston St. St. Catharines Ontario L2R 2Z9
<b>RFP Issued:</b>	Monday November 27, 2017
<b>Due Date for Proposals:</b>	Noon, Monday December 11, 2017

The policy of the Quest Community Health Centre (CHC) Board is to solicit proposals with a bona fide intention to award a contract. This policy will not affect the right of Quest to reject any or all proposals.

**Contact for Further Information:** Coletta McGrath, Executive Director  
[cmcgrath@questchc.ca](mailto:cmcgrath@questchc.ca)  
Ph: 905-688-2558, ext 226

### II. Summary

Quest CHC (Quest) is seeking consultant services for the development of a three year strategic plan based on the need for continued growth during an uncertain political environment and a transitioning health care sector. The project has been budgeted with an upset limit of **\$25,000**.

### III. Background

**Quest** is a non-profit organization providing primary health care, health promotion, and community capacity building to residents of St. Catharines and the Niagara Region who are not registered with another health care provider and are experiencing social, economic and cultural barriers to accessing care.

Emphasis is placed on several populations including individuals experiencing mental health, addictions, or concurrent disorders; Street involved populations (homeless, under-housed, people involved in sex work); isolated seniors; sexually and gender

diverse populations (LGBTQ+) with an emphasis on trans care; at risk children, youth and families; individuals experiencing mental health and addictions, who frequent the Emergency Department; and migrant agricultural workers.

Quest's catchment area extends beyond St. Catharines for clients who are part of our specialized programming such as our Urgent Service Access Team (USAT), Migrant Agricultural Worker Program (MAWP) and Rainbow Niagara. Trans specific health care is LHIN wide.

Our team consists of a wide range of interdisciplinary healthcare providers working in a shared care model. Our focus is on the delivery of client centred holistic health care that seeks to remove barriers to care as well as to address the Social Determinants of Health.

The Centre is governed by a 12 member volunteer Board of Directors operating within a policy governance model. The Centre's annual budget is approximately four million dollars. We currently have a Service Agreement with the Hamilton Niagara Haldimand Brant Local Health Integration Network (HNHB LHIN). In addition, Quest receives grants from miscellaneous foundations.

According to the Centre's Governance Policies it is Executive Committee's role to lead the development of Quest's Strategic Plan. The Board has assigned this responsibility to the Strategic Planning Committee.

Quest has developed two Strategic Plans since it was incorporated. The first strategic planning process took place in 2009, at which time a three year plan was developed for the period 2010-2013. [Quest CHC Strategic Plan Report 06.10.10 Final; The Balanced Score Card 2010-2013.](#)

The Centre's second strategic planning process took place in 2014/15. Rather than completing an in depth, community based engagement process as Quest did in 2009, the Board agreed that Board members would undertake a strategic review of the existing plan and obtain staff input into that process. The original plan was subsequently updated. [The Balanced Score Card 2015-2018.](#)

Quest has experienced significant changes and contributed to a variety of community initiatives since the second strategic plan was developed. The following list summarizes these key changes and initiatives:

- Quest's USAT became region wide and increased points of services to 7 different sites (vs. the original two at Quest's main office and the hospital); has increased staffing by 1.5 FTEs (1.0 RPN and .5 Outreach Social Worker), and received the AOHC's first Transformative Change Award
- Identified as the Lead agency for Health Links Mental Health and Addictions
- Joined and currently chairs the Niagara Region Mental Health and Addictions Complex Care Resolution Table
- Promotes and participates in the Niagara Integrated Community Lead (ICL) initiative; developed an ICL Toolkit in conjunction with USAT Project Management Team agencies (CMHA Niagara; Community Addictions Services Niagara [CASON]; NHS)

- Provides education on overdose prevention, recognition and response to Quest clients and their family/friends, including distributing Naloxone kits to clients/family/friends of people at-risk of an Opioid-related emergency.
- Established a MAWP)in Vineland, in addition to the Program in Virgil
- Worked in conjunction with Brock University to develop a course - Im/migrant Community Outreach Course and Internship
- Increased the number of days on which the Volunteer Dental Program is being offered from 2.5 to 4 days per week
- Introduced the Volunteer Chiropractic Program which is now operational one half day per week
- Initiated Volunteer Appreciation events for the MAWP, Dental and Chiropractor Programs
- Became a participant on the Age Friendly Leadership Council
- Introduced Client participation on Quest CHCs Board of Directors
- Introduced a Marketing and Communication Work Group and initiated the development of a Marketing and Communications Plan – *Raising Awareness Project*; Environmental Scan Report completed as a first step to inform the Plan
- Launched its first Chronic Disease Self Management Group for Clients
- Introduced “Same Day Service,” to see an RN/RPN
- Implemented the Client Reminder phone call system
- Rolled out an updated EMR (Purkinje 5) across the Centre
- Participated at the Refugee Planning Table and provides Niagara wide resource for refugee calls re services in Niagara
- Collaborated with the MOHLTC in the development of the Community Health Capital Program Toolkit; currently completing final section - Space Requests in conjunction with Architect; RFP for Quest’s permanent site location to be issued once space request approved
- Introduced a Board Mentoring Program
- Completed its second Organizational Culture Survey
- Introduced a Program Manager position as part of the organizational structure
- Became a participant on the Addictions and Mental Health Directors Group
- First Niagara Organization linked with Mobile Cancer Screening Coach; now delivers services at Quest two days a week, every two weeks
- Participates on the Niagara Sub-Region Anchor Table and the Niagara Sub Region Mental Health and Addictions Action Table; Likely participant at the Niagara Sub Region Health Links Action Table
- Designed and introduced a new Website

Attached, for further information, are links to our:

- 2016/17 Annual Report
- Agency web site:
  - [www.Questchc.ca](http://www.Questchc.ca)
- AOHC Website
  - [www.aohc.org](http://www.aohc.org)

#### **IV. Scope of Work**

The Quest CHC Board is seeking a consultant to lead the Board and staff through the process of developing a 3 year Strategic Plan. The plan will review Quest’s

vision/mission/principles and include the Strategic Directions, Goals, Objectives and Action Steps that will guide the organization for the next 3 years. It will include a strategy for moving forward during an uncertain political environment and a transitioning health care sector.

Some of the questions we want to be addressed in the Strategic Planning process are as follows:

- What should be Quest's areas of strategic focus?
- How should Quest position itself to respond to the Ministry of Health and Long Term Care's transformation process? HNHB LHIN priorities?
- What is meaningful to our other stakeholders - clients, funders, staff, other?
- What are the drivers that could have a significant impact on Quest over the next 3 years?
  - Are there demographic considerations?
  - What changes in technology/social media should be taken into account?
  - What external opportunities might move Quest forward?
  - How do we develop a plan to deal with the most significant drivers?
- Are there any government regulations or changes that could have a significant impact? What challenges will we face if there is a change in government?
- Are there new service areas that should be considered?
- How will service priorities be set?
- Are there new funding opportunities and/or new funding streams?

The process needs to engage Quest Clients, Board members, staff, and community stakeholders (e.g. other CHCs in the HNHB LHIN; other relevant agencies such as CMHA-Niagara Branch, Community Addictions Services of Niagara (CASON), Niagara Health, Pathstone Mental Health; FACS Niagara, Niagara Region Public Health, Start Me Up Niagara, Shelters, etc.). The stakeholder engagement process should provide Quest's stakeholders sufficient opportunity to provide input into Quest's future Strategic Plan.

Relevant literature and reports will also need to be identified and reviewed. This will include but not be limited to documents such as the MOHLTCs "*Patients First*," and "*Aging With Confidence, Ontario's Action Plan for Seniors*," the HNHB LHINs "*Strategic Health System Plan*" and "*Integrated Health Service Plan*", the AOHC's Strategic Plan "*Championing Transformative Change*," and Quest's "*Marketing and Communications Environmental Scan Report*" and Organizational Survey Results.

The consultant will work with the Strategic Planning Committee, comprised of Board members and the Executive Director, on the details of the strategic planning process, schedule of activities, selection of background information, etc.

## **V. Deliverables**

A Strategic Plan document that must include the following in detail: Mission, Vision, Strategic Directions, Goals, Objectives and Action Steps for the next three years.

## **VI. Timetable**

December 11, 2017 (no later than Noon EST)	Proposal due
January 26, 2018	Reach award decision
February – June, 2018	Planning activities
July, 2018	Plan draft completed
August, 2018	Plan adoption

## **VII. Selection Process**

The Strategic Planning Committee will review all proposals. In evaluating proposals, price will not be the sole factor. The Committee may consider any factors it deems necessary and proper, including but not limited to: price, quality of service, response to this request, experience, staffing, and general reputation.

The failure to meet all procurement policy requirements shall not automatically invalidate a proposal. The final decision rests with the Quest CHC Board.

## **VIII. Information Required of Respondents**

*In responding to this RFP please use the following format:*

### **Section 1. Summary of the Proposal**

Provide a brief summary of Sections 2 through 6 of the proposal.

### **Section 2. General Description of the Planning Activities Recommended**

Provide a brief statement of your understanding of the requested effort including the conclusions.

### **Section 3. Work Plan**

Provide detailed information about the activities proposed and identify the Quest CHC individuals, as well as other individuals or groups involved with each activity. Also provide a timetable for completing the process within the timeframe in Part VI.

### **Section 4. Staffing Plan, Examples Highlighting Experience and Resumes**

Please identify each consultant who will work on the project and identify their roles. Provide a resume and references for each team member. Provide an example of a completed Strategic Plan.

### **Section 5. Budget**

For each task in Section 3, please identify the expected hours of staff members identified in Section 4 and the total cost. Quest will reimburse the consultant for those tasks completed during the timeframe outlined in the proposal. Identify the total billing rate for each project member. Please identify detailed costs for anticipated on-site meetings.

**Please use the following budget format:**

Activity	Staff	Hours	Project Cost
Total			

### **Section 6. References**

Please supply the names of three references for which you have worked on similar projects. Include the current contact information for each reference. References from community health centres, or similar health service providers/ not-for profit organizations are preferred.

### **IX. Proposal Submission**

Proposals should be prepared in a straightforward manner to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

Questions concerning this RFP shall be directed to Coletta McGrath, Executive Director, at 905-688-2558, ext 226 or [cmcgrath@questchc.ca](mailto:cmcgrath@questchc.ca)

Address the Proposal to: Coletta McGrath, Executive Director

Email address: [cmcgrath@questchc.ca](mailto:cmcgrath@questchc.ca)

Subject line: Strategic Planning Proposal

Proposal should be marked as confidential.

Deadline for Receipt of Proposal: **No later than Noon (EST), Monday December 11, 2017**

Quest may request representatives of a bidding organization to appear for interviewing purposes. Travel expenses and cost related to the interview will be the responsibility of the bidder.

Quest will reach a decision on awarding the contract no later than **Friday January 26<sup>th</sup>, 2018**

### **X. Additional information**

Consultants may provide any additional information they feel would assist Quest CHC in the selection process.

### **XI. Proposal Review and Assessment**

Professional firms will be evaluated on the criteria listed on page seven. These criteria will be the basis for review of the written proposals and interview session.

The rating scale shall be from 1 to 5, with 1 being a poor rating, 3 being an average rating, and 5 being an outstanding rating.

## PROPOSAL EVALUATION

WEIGHTING FACTOR	QUALIFICATION	STANDARD
2.0	Scope of Proposal	a) Does the proposal show an understanding of the project objective and results that are desired from the project?
2.0	Assigned Personnel	a) Do the persons who will be working on the project have the necessary skills and experience? b) Are sufficient people of the requisite skills assigned to the project?
1.0	Availability	a) Can the work be completed in the necessary time? b) Can the target start and completion dates be met? c) Are other qualified personnel available to assist in meeting the project schedule if required? d) Is the project team available to attend meetings as required by the Scope of Work?
1.0	Motivation	a) Is the firm interested and are they capable of doing the work in the required time frame?
2.0	Cost and Work Hours	a) Do the proposed cost and work hours compare favorably with the Strategic Planning Committee's estimate? b) Are the work hours presented reasonable for the effort required in each project task or phase? c) Does the firm have the ability to meet deadlines and operate within budget?
2.0	Firm Capability	a) Is the firm familiar with Ontario's health system and has had previous relevant and positive experience in projects of this type and scope and success in strategic planning? b) Does the firm have the required insurance – minimum liability of \$2.0M

## REFERENCE EVALUATION

The Executive Director will check references using the following criteria. The evaluation rankings will be labeled Satisfactory/Unsatisfactory.

QUALIFICATION	STANDARD
Overall Performance	a) Would you hire this Consultant again? Did they show the skills required by this project?
Timetable	a) Was the original Scope of Work completed within the specified time? b) Were interim deadlines met in a timely manner?
Completeness	a) Was the Consultant responsive to client needs; did the Consultant anticipate problems? b) Were problems solved quickly and effectively?
Budget	a) Was the original Scope of Work completed within the project budget?
Job Knowledge	a) If a study, did it meet the Scope of Work? b) Were problems corrected quickly and effectively?