



Request for Proposals

Strategic Business Planning

Proposal Deadline: January 25, 2021

December 2020

Contact:

Denyse Newton,
CEO, Alzheimer Society Durham Region
202 – 1600 Stellar Drive
Whitby, Ontario L1N 9B2
(905) 576-2567 ext 5223
dnewton@alzheimerdurham.com

TABLE OF CONTENTS

Timeline	3
Background	3
Purpose	4
Scope	4
Project Outline – Phase 1 & 2 Deliverables	4 - 5
Proposal Content	6
Budget	7
Proposal Evaluation & Application Review Criteria	7
Reference Checks	8

Alzheimer Society

DURHAM REGION

TIMELINE

December 23, 2020	Release Request for Proposals
January 12, 2021	Consultant questions due
January 25, 2021	Proposal deadline. Proposals to be submitted via email to Denyse Newton at dnewton@alzheimerdurham.com
Feb 1 st – 5 th , 2021	Interview consultants
February 12 th , 2021	Consultant selected & advised
Phase 1 Deliverables	June 30 th , 2021
Board Presentation	September 20, 2021
Final Report & Implementation Plan	September 30 th , 2021

Proposals must be received no later than January 25th 2021 at 4:30 p.m. to Denyse Newton, CEO, at dnewton@alzheimerdurham.com. Please quote "**RFP Business Plan**" in the subject line.

BACKGROUND

The Alzheimer Society of Durham Region ("ASDR") is a not-for-profit charitable organization whose mission is to improve the quality of life for those living with Alzheimer's disease and related dementias, their care partners and families, and the community at large throughout Durham Region. ASDR has operated in the Durham community for over 40 years. In Durham Region, it is estimated that 10,000 people live with Alzheimer's disease or a related dementia with this number expected to double in the next 10 years. The current Vision, Mission & Values of ASDR can be found in the attached Appendix "A".

With a staff roster of 28, ASDR provides education, support, respite and recreation to persons living with dementia and his/her caregiver & family, as well as healthcare professionals and businesses. Our operating budget of \$2.6 million is funded through the Central East LHIN, private donations and other fundraising efforts.

For more information, please visit www.alzheimer.ca/durham .

PURPOSE

ASDR is seeking proposals from qualified consultants and/or consulting firms to assist in the analysis and development of a post-COVID-19, 3-5 year business plan that will guide the agency through the post-pandemic world and bolster its position within the community support sector.

SCOPE

ASDR will work with consultants to build a sustainable, future state business model which will include the following objectives:

- Conduct a practical assessment of the financial/operational health of the organization to identify and categorize critical risk factors (current state analysis);
- Provision of unbiased evidence and an informed approach;
- Development of an actionable and strategic 3-5 year business plan, which will guide future decisions and activities in alignment with our Strategic Plan;
- Development of a Business Plan Implementation strategy which will prioritize activities effectively and result in strategic goal achievement and delivery on mandate;
- Consideration of the feasibility of service-level integration/partnerships with identified community partners as a strategic option.

PROJECT OUTLINE AND DELIVERABLES:

Phase 1: Benchmarking and Model Evaluation

- Review of current Strategic Plan and consultation with Senior Leadership Team (“SLT”) and key members of the Board of Directors on the history, needs and priorities of ASDR now and in the next 3 – 5 years;
- Financial Analysis of the health of ASDR considering revenue sources & trends, operating expenses, and other financial variables such as pandemic-related costs, anticipated costs for delivery of services in ways that leverage technology. High priority financial risks and their impacts will be identified.
- Operational Review – the general operations of ASDR will be reviewed to assess the efficiency and effectiveness of ASDR services/functions
- Best practice research bringing forward 3 case studies on organizational business models in comparable charitable settings, with a particular attention to agencies operating within a federated model, to discover leading practices to be used in business planning;
- Research and recommend potential service integration opportunities in light of future Ontario Health Team development;
- Review, critique and make recommendations on an initial business model for consideration;

- Consultation with Fund Raising Consultant (separate RFP) on future revenue generating opportunities;
- Develop & present interim report and findings to the SLT and Board members to further develop the model ASDR would like to move forward on.

Deliverables (Phase 1)

- Interim report summarizing the following:
 - findings, evaluation of current and 3-5 year operational needs,
 - high priority financial risks & impact,
 - 3 appropriate and informative organizational business model case studies,
 - recommendations on potential service integration opportunities,
 - considerations for future revenue generating opportunities
 - initial recommendations for which models as well as operational partnerships would best fit the current and future-desired operation of ASDR.
- Draft marketing & communications plan based upon preferred model
- Consultants will collaborate with Fundraising Consultants prior to submission of interim report

Phase 2: Business Plan Design and Finalization

Develop a business plan based on the model selected by the ASDR SLT and create a business plan tailored to ASDR's current operations, existing and future goals. This plan must include an implementation plan citing:

- identification of milestones and means of measuring achievement of milestones
- Financial cash flow projections
- Human resource requirements
- Proposed operational partnership & model
- Organizational restructuring/recommendations
- Marketing & communications strategies
- Additional revenue generation recommendations

Phase 2 Deliverables

- A 3-5 year strategic business framework/plan, in alignment with ASDR's strategic plan, to guide prioritization of potential options to address risks and issues including prioritization of strategic initiatives
- Implementation plan setting out key strategic initiatives, milestones & metrics
- Detailed marketing and communication plan to internal & external stakeholders

Proposal Content

Proposals must include the following:

1. General Information

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, and email address for each person engaged in scope activities. Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the “point” person for the purposes of this RFP and the engagement.

2. Consultant Qualifications

To accomplish the scope requested, the consultant will need to possess the following qualifications:

- Experience at successfully developing business plans tailored to the charitable sector
- Knowledgeable of the non-profit sector and issues
- Knowledge of the healthcare & community support systems
- Knowledge of Ontario Health teams;
- Experience at gathering and utilizing data to inform the business development process
- Knowledgeable in marketing and communications
- Knowledgeable in resource development in the charitable sector is an asset

3. Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant in order 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
- A detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables. Overall budget should not exceed fifty-two thousand dollars (\$52,000)

4. 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. At least one of the three references should be from a business/customer which has retained the consultant in the development of a business plan that has been fully executed by the customer.

5. Previous Work Product

The proposal should include at least two examples of written works similar to the scope of work requested within this RFP (e.g., business plan).

Project Budget

The fee-for-service budget for this scope of work is \$52,000.

Proposal Evaluation

Proposals submitted in response to this RFP will be evaluated by a committee comprised of ASDR SLT and Board members according to the following criteria:

- Cost/Benefit to ASDR
- Consultant/Firm Relevant Experience and Qualifications
- Work Plan/Scope of Work
- Compliance with Proposal Requirements
- Value-Added or Innovative

Proponents may be contacted following the submission deadline for an interview or to answer clarifying questions regarding proposal content if necessary.

Criteria for Evaluating Success of the Project

The ASDR team will deem this a successful project when they are given a clear report which outlines the strategic business directions, areas of improvement and a recommended action plan. Previous strategic and other plan materials will be provided to the consultant as background information upon request.

Application Review Criteria

The proposals will be reviewed and evaluated based on the following criteria:

1. Qualifications (35 points)	<ul style="list-style-type: none">• The consultant has the qualifications needed to successfully complete the scope of work• The consultant has prior experience working on similar projects• The Consultant has extensive working knowledge of healthcare and community services in Ontario
2. Scope of Proposal (30 points)	<ul style="list-style-type: none">• The proposal demonstrates an understanding of the project objectives and desired results• The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable business plan• The proposal illustrates the consultant's ability to successfully execute the proposed approach
3. Work Plan	<ul style="list-style-type: none">• The proposal adequately details project activities and milestones

(25 points)	or deliverables associated with each stage of the scope of work <ul style="list-style-type: none"> • The proposal includes a detailed timeline for each stage • The work can be completed within the project timeline
4. Budget (10 points)	<ul style="list-style-type: none"> • The proposal includes a detailed budget for each stage of the scope of work • Proposed costs are reasonable • Proposed schedule of payments corresponds appropriately with tasks, milestones or deliverables

Reference Checks

Information from references will be evaluated using the following criteria. The evaluation will be labeled as satisfactory or unsatisfactory.

References

(Satisfactory/Unsatisfactory)

- The reference would hire the consultant again
- The original Scope of Services was completed within the specified timeline
- Interim deadlines were met in a timely manner
- The consultant was responsive to their agency’s needs
- The consultant anticipated problems, and solved them quickly and effectively
- The original Scope of Services was completed within the project budget

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 January 29 – Feb 12, 2021.

Consultant selection will be based on the consultant’s written proposal, interview(s) and the results of the reference checks.