



STRATEGIC PLANNING

2027 – 2032

REQUEST FOR PROPOSALS

Request for Proposals (RFP) - Strategic Planning Consultant Services

Alzheimer Society of Nova Scotia (ASNS)

Strategic Plan Period: April 1, 2027 – March 31, 2032

Planning Process Period: March 2026 – February/March 2027

1) Introduction

The Alzheimer Society of Nova Scotia (ASNS) invites proposals from qualified consultants/firms to support and facilitate the development of ASNS's next **five-year strategic plan** covering **April 1, 2027, to March 31, 2032**.

ASNS is seeking a partner with strong nonprofit strategy expertise, excellent facilitation capability, and demonstrated experience building plans that translate into operational execution, governance oversight, and measurable outcomes.

ASNS is issuing this RFP to ensure a fair, transparent selection process and to confirm best value for the organization. The organization may invite proposals from multiple qualified firms, including any prior strategic planning partner, and will assess all submissions using the evaluation criteria outlined in this RFP.

2) About ASNS

ASNS is a registered nonprofit organization serving Nova Scotians impacted by dementia. Our work includes education, support, navigation, advocacy, and community partnerships.

- **Geographic scope:** Province-wide (Nova Scotia)
- **Approx. annual operating budget:** **~\$4M CAD**
- **Staffing/structure:** forty-four staff total; most at Halifax main office, six regional staff working from home offices. 15-pax volunteer Board of Directors/committee structure.
- **Current strategic plan period:** April 2022 – March 2027 - [View our current plan here](#)

3) Purpose and Objectives

ASNS seeks a strategic planning process that results in a plan that is:

- Clear, compelling, and aligned to mission and values
- Grounded in the lived experience of people affected by dementia
- Practical and executable, with clear accountabilities
- Measurable, with defined outcomes and a performance framework

4) Scope of Work

Proponents should propose a structured approach that includes (at minimum):

A) Project Initiation and Design

- Kickoff meeting(s) with CEO and designated project lead
- Confirm scope, workplan, engagement plan, and decision-making process
- Review relevant documentation (current plan, program/service data, financial context, org charts, stakeholder materials, etc.)

B) Environmental Scan and Strategic Context

- Sector and policy/funding context relevant to dementia care and support in Nova Scotia
- Trends, risks, opportunities, and implications for ASNS (concise and practical)

C) Stakeholder and Community Engagement

Design and deliver an engagement approach that captures both internal and external perspectives. Proposals should specify recommended minimum engagement, such as:

- Board consultation approach
- Leadership team sessions and structured staff engagement
- Key informant interviews (e.g., partners, funders, system leaders, community partners)
- ASNS client consult via survey
- ASNS Lived Experience Committee consults
- Open public survey
- Community feedback sessions (virtual/in-person) – a main component (anticipate 15+)

Proponents should describe how they ensure inclusive participation and how they synthesize input transparently (including surfacing areas of consensus and divergence).

D) Strategy Development and Facilitation

- Facilitate strategy development workshops (virtual or in-person as proposed)
- Support the development/refinement of:
 - Vision, mission, values (as appropriate)
 - Strategic priorities and outcomes
 - Strategic “choices” and trade-offs (what ASNS will do more of / do differently / stop)

- Enablers (e.g., people/culture, funding model, partnerships, digital, governance)

E) Plan Writing, Validation, and Finalization

- Draft strategic plan for review
- Conduct validation rounds with leadership, staff, and board consultation touchpoints
- Produce final plan and board-ready materials

F) Implementation and Measurement Framework

- Translate strategy into an implementation roadmap (minimum first 12–18 months)
- Provide a recommended performance framework (KPIs/outcomes) suitable for board monitoring and management reporting

Optional Add-On: Implementation support post-approval (e.g., quarterly check-ins, dashboard setup, operating plan alignment)

5) Deliverables

At minimum, ASNS expects the following deliverables:

1. **Project Charter / Workplan** (timeline, engagement plan, governance/decision points)
2. **Engagement Summary** (themes, what was heard, implications; include divergent viewpoints where relevant)
3. **Environmental Scan / Strategic Context Brief** (practical and succinct)
4. **Draft Strategic Plan (v1)**
5. **Draft Strategic Plan (v2) after validation**
6. **Final Strategic Plan (Board-approved version)**
7. **Implementation Roadmap** (12–18 months with owners, milestones, dependencies)
8. **Performance Framework** (draft KPIs/outcomes/scorecard suitable for board oversight)
9. **“Strategy on a Page”** graphic/summary (design-ready)
10. **Board Presentation Deck** and facilitation for final approval discussion

Format requirements: Final versions in **editable Word, PDF, and PowerPoint** (and any strategy-map graphic as PNG/PDF).

6) Timeline and Milestones

Strategic plan period: April 1, 2027 – March 31, 2032
Planning process begins: Spring 2026
Target completion: Final plan approved **no later than February/March 2027** to enable soft launch in April 2027, and public launch at our *June 2027 Annual General Meeting (AGM)*.

Anticipated Key Milestones:

RFPs received, reviewed, vendor selected	<i>March 2026</i>
Kick-off/discovery meetings (Define scope, identify consult demographics, define final deliverables)	<i>March 2026</i>
Project Charter/work schedule approved Environmental scan/document review	<i>April 2026</i>
Key interest-holder consults (Staff, Lived Experience, Government, partners)	<i>April 2026 – July 2026</i>
Community consults (In-person & virtual)	<i>May 2026 – September 2026</i>
Open Public Survey	<i>May 2026 – July 2026</i>
Working session with ASNS Board	<i>June 2026</i>
Preliminary data review – spotlight trends on data collected so far	<i>July 2026</i>
Funding pre-submission to Provincial Government	<i>August 2026</i>
Data consolidation and draft plan framework	<i>September 2026</i>
ASNS review and feedback on draft	<i>September/October 2026</i>
Final draft reviewed and compiled	<i>October/November 2026</i>
Collateral needs developed/graphic design	<i>December/January 2027</i>
Final version in hand	<i>February 2027</i>
Release/communications campaign developed	<i>March 2027</i>
New Strategic Plan soft launch	<i>April 2027</i>
New Strategic Plan Public Launch	<i>June 2027 (AGM)</i>

7) Budget and Pricing

ASNS requests a proposed fixed fee in the range of **\$26,000 - \$32,000**, and detailed pricing breakdown including:

- Total fee and what is included
- Consulting days/hours by phase
- Number of sessions/interviews included (and rates for additional scope)
- Expenses/travel assumptions
- Optional add-ons with separate pricing
- Proposed payment schedule

8) Proponent Qualifications

Proponents should demonstrate:

- Experience facilitating strategic planning for nonprofits (health, social impact, community-based orgs preferred)
- Strong facilitation skills (including handling conflict, power dynamics, and inclusion)
- Ability to produce actionable plans with implementation and measurement frameworks
- Understanding of stakeholder engagement and synthesis methods
- Ability to work with boards and executive leadership in a governance-aware way
- An appreciation for conducting work that is aligned with person-centred values and considerate of D.E.I needs

9) Submission Requirements

Please submit one PDF that includes:

1. Executive summary (1 page)
2. Proposed approach and methodology
3. Engagement plan (who, how, how many sessions/interviews, tools)
4. Workplan with timeline and milestones
5. Deliverables (clearly mapped to Section 5)
6. Project team bios and roles (identify lead facilitator)
7. Relevant project examples (2-3)
8. References (2-3)
9. Full budget and assumptions
10. Conflict of interest statement (if any)

10) Evaluation and Selection

ASNS will evaluate proposals using the following criteria:

Criteria	Weight
Understanding of ASNS context and needs	15%
Quality, practicality, and clarity of proposed approach	25%
Facilitation capability and engagement design (inclusive, credible, efficient)	20%
Implementation + measurement approach (roadmap, KPIs, board usability)	15%
Team qualifications and relevant experience	15%
Value for money and budget transparency	10%
Total	100%

ASNS may shortlist proponents for interviews and may request clarification or additional information.

11) Terms and Conditions

- ASNS is not obligated to accept the lowest-priced proposal or any proposal.
- ASNS may cancel or reissue this RFP at its discretion.
- All proposal content will be treated as confidential within ASNS selection processes.
- Any conflicts of interest must be declared.
- Deliverables produced under contract will be the property of ASNS.

12) RFP Schedule and Submission Details

- **RFP opens:** February 2, 2026
- **RFP closes:** Friday February 20, 2026
- **Decision:** March 2, 2026
- **Project start:** March 2026

Submit proposals to:

Name/Title: John Britton, CEO

Cc. Audrey Milley, Director of Finance and Operations

Email: john.britton@asns.ca

audrey.milley@asns.ca

Subject line: "RFP Submission – Strategic Planning – ASNS"

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