



HAPPY IN MY HOME
Community Support Services of Niagara

REQUEST FOR PROPOSAL
STRATEGIC PLAN

Issue Date: July 4, 2023

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Background

Happy in my Home, Community Support Services of Niagara (CSSN) is a volunteer-based not-for-profit agency providing comprehensive client-driven community support services to help seniors and adults with disabilities live independently in their own homes. CSSN staff feel that their daily work is meaningful, impacts those in the community and allows our clients to live their lives to the fullest. More information can be found on our website: <https://happyinmyhome.ca/>

CSSN engaged in strategic planning several years ago, resulting in the attached Strategic Plan for the years 2018-2021 (See Appendix A). As a result of the Covid-19 Pandemic our return to the strategic planning table has been delayed and we are now putting out this Request for Proposals (RFP). While our mission and values have remained the same as a not-for-profit organization, the way in which we do our work has been impacted by the post-Covid-19 world and we want to secure a plan that reflects these impacts and can make us an even stronger community support services agency going into the next few years.

Our Mission

We are a community partner that provides support services for seniors and adults with disabilities by promoting independence, dignity, and inclusion.

Our Vision

A society where seniors and adults with disabilities are supported so they achieve their fullest potential in all aspects of life.

Our Values

We Believe: in building strategic partnerships to promote seamless community supports so that seniors and adults with disabilities can live independently with dignity in their own homes.

We Believe: that every individual should be treated equitably, with empathy, with integrity and with respect.

We recognize: the contribution of our staff and volunteers and know that by working together we can best serve the residents of Niagara.

We are accountable: for the provision of quality service focused on individual client needs and the effective and efficient use of our resources.

General Information, Terms and Conditions, Proposal Due Date and Inquiries

General Information

1. This Request for Proposal (RFP) is for facilitation of services relating to the development of a three-year strategic plan.
2. The project will commence in late summer and Fall 2023 .
3. This document is an RFP and should not be misconstrued as a contract or letter of intent.

Terms and Conditions

1. All proposals submitted become the property of CSSN.
2. CSSN reserves the right to reject any and all proposals.
3. CSSN reserves the right to negotiate any aspect or terms of the proposal.
4. Changes to a proposal will not be accepted after the proposal due date specified below.
5. This RFP in no way commits CSSN to make an award or to reimburse any company or individual for any expenses incurred in responding to the request.
6. Proposal may be included as part of the terms of the contract.
7. The decision of CSSN's Board is binding and final.
8. Proposals should contain the following information.
 - An outline of a plan (activities and time frame) to create a practical, clear 3-year strategic plan document that aligns with CSSN's mission, vision, and Values.
 - A description of the consultant's relevant experience with a not-for-profit organization.
 - An outline of anticipated costs, recognizing that we are a not-for-profit organization and that our maximum approved budget is \$15,000.00.
 - The names and contact information for three professional references.

Scope of Work/Engagement

While proposals should include, as above, an outline of a plan, we suspect the Scope of Work/Engagement may include some or all of the following:

1. Pre-engagement session with Board of Directors and Senior Management Team.
2. Development of engagement with interested and affected parties.
3. Facilitation of in-person strategic planning focus workshop(s).
4. Preparation and presentation of a draft 3-year Strategic Model for approval.

Proposal Due Date

1. Proposals must be submitted in electronic (.pdf) format
2. Proposals must be received no later than the close of business , 4:00 pm on August 4, 2023. Proposals received after the date and time specified will not be accepted.
3. Proposals should be addressed to:

Carolyn Askeland
Executive Director
Happy in my Home, Community Support Services of Niagara
3 – 320 Vansickle Road, St. Catharines, ON L2S 0B4
Email: caskeland@cssn.ca

Inquiries

1. Inquires may be submitted by email, fax or by phone to the following:

Carolyn Askeland
Executive Director
Email: caskeland@cssn.ca
Telephone: 905.682.3800 ext. 701
Fax: 905.682.2957

2. All inquiries must be received no later than 4:00 p.m. July 14, 2023.
3. All respondents will receive a list of the questions and responses.

Timetable

RFP Issued	July 4, 2023
Deadline for Inquiries	July 14, 2023
Response to all Inquiries	July 20, 2023
Proposal Due Date	August 4, 2023
Interviews (if required)	Week of August 14, 2023
Board Approval	August 24, 2023
Notification to successful applicant	August 28, 2023

Appendix A - Strategic Plan for 2018 – 2021 year

Community Support Services Niagara 2018-2021 Strategic Framework			
	Core Services	Revenue Generation	Support Functions
Leadership Actions	Provide essential, high quality, and in demand non-medical community support services to seniors and adults with disabilities in Niagara	Establish sustainable revenue generation channels to support service growth and fair compensation	Build the capacity of staff, volunteers and governance to thrive and the supportive infrastructures to deliver service excellence
Strategic Objectives	<p>Continue and improve core services: <i>Meals on Wheels, Transportation, Friendly Visiting, Safety at Home, Congregate Dining, Homemaking</i></p> <p>Optimize transportation services</p> <p>Improve and expand Meals on Wheels</p> <p>Explore feasibility of Home-To-Stay program</p>	<p>Develop a Revenue Generation program consisting of existing and potential new programs</p> <p>Develop human resources required for revenue generation</p> <p>Establish corporate partnerships</p> <p>Strengthen and expand strategic partnerships</p>	<p>Design a Volunteer Development program</p> <p>Strengthen partnership management</p> <p>Cultivate a healthy and supportive workplace culture</p> <p>Engage in a (re)branding initiative</p>
Year One Goals	<p>A service evaluation framework including cost-benefit analysis are in place</p> <p>Core services are evaluated from all perspectives (client, staff, volunteers, stakeholders)</p> <p>A plan to extend transportation services is in place</p> <p>A plan and the requirements to continuously improve the quality of food for Meals on Wheels is in place</p> <p>Plan for consideration of regional expansion of Meals on Wheels is developed</p> <p>A Go/No-Go decision to reinstate the Home-To-Stay program is made and endorsed by Executive Staff and Board of Directors</p>	<p>Strategies to increase overall revenue by 30% is prepared</p> <p>Human resources are in place to lead revenue generation (third-party, in-house or combination)</p> <p>Fundraising strategy and an annual fundraising goal is determined and endorsed by Executive Staff and Board of Directors</p> <p>A CSSN Legacy Fund created and promoted to all clients</p> <p>Donor advised and / or directed fundraising campaigns are designed and requirements are in place</p>	<p>A program model and the requirements to develop volunteers is in place</p> <p>A review of partnerships and partnership models to streamline and expand core service delivery is conducted.</p> <p>A plan is in place to address fair staff compensation</p> <p>All Board of Director members are engaged in self-development regarding governance and/or capacity building</p> <p>All staff and Board of Directors are engaged in providing input on the CSSN brand</p>
Year Two and Three Goals	<p>Transportation services are provided flexibly outside of regular office hours</p> <p>Meals on Wheels food quality is improved with evaluation data to demonstrate the improvements</p> <p>Meals on Wheels is expanded to new and within existing locations</p> <p>Core services are adapted/improved annually based upon evaluation findings</p>	<p>Revenue is increased by 30% annually</p> <p>3-5 new corporate partnerships are established annually</p> <p>CSSN Legacy Fund increased annually by 10-15%</p> <p>Donor advised and/or directed fundraising campaigns are operational and generating revenue that is growing 10% annually</p>	<p>CSSN is rebranded including a new aesthetic, visual assets, key messages, marketing and communication materials</p> <p>A promotion plan is established and implemented to leverage refreshed brand</p> <p>A brand awareness evaluation is conducted</p> <p>Staff and volunteer incentive programs are developed and piloted</p>
Outcome	Be identified by the community and stakeholders as the 'go-to' agency for non-medical support services for seniors and adults with disabilities in Niagara		