

Question and Answer's for Homes First Strategic Planning Session RFP

All questions sent to reidun.rosi@homesfirst.on.ca have been either directly quoted and answered below or they are captured in some of the other answers as some questions received were similar. We are not accepting anymore questions. Proposals are due Friday December 4th, 2020 5:00pm (Est).

1. How many people are on the Management Team and what are their titles?

There are 6 people on the management team, and their titles are:

Director of Property Management Operations
Director of Human Resources
Director of Development and Homelessness Initiatives
Director of Housing and Shelters
Director of Finance and Administration
Chief Executive Officer

2. Does “and approximately 20 people” mean 20 additional people to Board & Management Team or that the Board & Management Team equal approximately 20 people? If there are approximately 20 additional people who are they, i.e. volunteers, clients, stakeholders from specific groups, etc.?

There may be up to 20 additional people at the session. The attendance may include any or all of the following: Board Members, CEO, Directors, and some key mangers (for example: Manager of Shelters, Fundraising Manager etc.). Only paid staff members and BOD are attending.

3. Will there be a requirement for accessibility tools such as closed captioning, sign language or others during the virtual strategic planning or diversity training facilitation?” If yes please clarify which tools will be required.

No this will not be required.

4. If Homes First decides to include a Diversity Training session will it be for the same group that participates in the Strategic Planning session or a different group? Please specify who and how many this session would be for. Will the same accessibility tools be required for this session as for the Strategic Planning session? Would this group be available for a full-day training session?

There have been many questions about the diversity training. As stated in the RFP, it will not be connected to the Strategic Planning Session and will be conducted separately. We kept that detail in the RFP document only as a fact for applicants to know about the organization.

5. *Should we submit our final response to the email reidun.rose@homesfirst.on.ca?*

The spelling of the name is wrong in your question – please ensure to send proposals to:
reidun.rosi@homesfirst.on.ca

6. *Are we able to submit our response to Homes First in a different format than what is in the RFP document? (i.e. using our corporate branding). Readability and navigation will be clear and concise regardless of formatting.*

Please keep the same format of the mandatory forms – any other format may be changed however it must be easy to navigate and be clear.

7. *Is Homes First expecting proposals in hardcopy or via email?*

We are only accepting proposals via email to address above.

8. *Has a maximum budget been identified for this project?*

This has not been decided. Please estimate the costs of this opportunity along the lines of similar projects you have completed.

9. *There have been many questions like the following:*

“In our previous strategic planning engagements, we have undertaken extensive stakeholder consultation prior to the strategic planning retreat. Could you please clarify whether you are expecting the consultants to engage in any preliminary stakeholder interviews/consultations prior to the retreat or whether all stakeholder engagement will occur at the retreat”

We not expecting extensive stakeholder consultation prior to the strategic planning event. There may be an interview/call with our CEO and possibly one meeting with all the Executive team (collection of 5 BOD members). We are not expecting 1:1 consultation with all people attending.

10. *Could you please confirm if there is some flexibility in the planning and delivery of the strategic planning retreat. Although the RFP notes the incorporation of "fun" activities through the strategic planning day, stakeholders may be challenged to participate in a full "virtual" day. Will Homes First expect or entertain alternative proposals to the full day retreat?*

Proposals for the strategic planning session must detail one full day of virtual activities. If your group would like to submit additional ideas of how the day/event could flow, please attach them at the end of

your proposal in your appendix, and only as an additional alternative to the one full day of virtual activities. For your proposal to be considered, applicants' main proposal must be for one full day of virtual activities. Be mindful that COVID guidelines will more than likely still be in place and any alternatives added in proposals will probably have to be by phone/zoom.

11. I heard about an RFP Homes First Society has posted on MERX, but I can't find any general information about the project. What is the focus of the Strategic Planning for this RFP?

The focus of the strategic planning session is to create a new strategic plan for the next three years of the agency. The actual development of the strategic plan is not the responsibility of the Facilitator – the Facilitator will do exactly what their title entails, facilitate the group members participation to create the next strategic plan.

12. Is the main body of the proposal to consist solely of the list of required information, forms and attachments listed under "Requirements of RFP Response" (pages 9 & 10), or may the Institute include additional relevant information regarding approach etc.?

Applicants may add additional information with their proposal's in an appendix section. As the RFP has stated:

Applicants may include additional information as an addendum/appendix to its proposal if the applicant thinks that it will assist HFS in evaluating the applicant's proposal. Applicants should not include information that is not directly related to the subject matter of this solicitation.

13. Our understanding is that the main point of engagement will be a 1-day facilitated session. Is that 1-day session to also include context setting and SWOT analysis or is this work being done by staff in advance? If the former, is Homes First open to preparatory work / engagement to build the environmental scan and SWOT analysis in advance of the session?

Again, we would like the session to be virtual and one day. If your group would like there to be things like a "context setting" and a "SWOT" analysis, then please include that in the day's agenda or if it felt that there is not enough time, make a note of it in your proposal and include the detailed suggestions in an additional attachment.

For example: if your group felt it was necessary to have these done in advance, make a note in the proposal and please make the case for that in an additional document attached to the main proposal in an appendix section.

14. Are you able to provide the required forms in Word format?

Yes, the forms are available in word format – please see attached.

15. Briefly, what was the process and who was involved in the development of the last Strategic Plan (2017-2020) put together?

The last Strategic Planning Session was one full day of face-to-face activities in a conference room. There was no major preparation (like interviews in advance). The Facilitator was a professional contact through a BOD member that donated their services in-kind.

16. What are some of your measures of operation/success (KPIs)?

We are currently undergoing a Logic Model evaluation however some of the main KPI's are how many people housed out of our shelters, and how many tenants are able to be housed long-term in our Supportive Housing.

17. How many employees (FTES/part-time) work at Homes First (HF)?

Including contract and relief – almost 500 staff.

18. How is Homes First connected to the John Tory (mayor) City government? We note that \$23M in funding comes from the City. What is the specific nature of the relationship to the funder?

We have a good relationship with the City and work with them on many projects. We operate many city-owned shelters and there are many other support service projects they fund. For example, Housing Help workers are staff who work directly in shelters and work to acquire housing for homeless individuals in those shelters. We employ several of these positions and the program is funded by the City.

19. Who is the Strategic Planning project “champion”? Who on the management team is leading this effort? Related, would you consider sharing your Homes First organizational chart?

The CEO is leading the effort and we will share our organizational chart with the successful applicant.

20. We note that your current pillars are:

- *High Quality Portfolio*
- *Responsive Programming*
- *Strong Partnerships*
- *Sustainable Organization*

Do you anticipate that these would change expect these could change during the Strategic Planning process?

Some or all pillars may change. However, we have been advised that as a mature organization they are unlikely to drastically change.

21. How is this Strategic Planning project being funded? Is it included in the current operational budget or is it being underwritten by a donor/s or other funder?

It will be funded by the current operational budget as it has been budgeted for in advance.

22. Could HFS share the anticipated timelines for the engagement?

As stated in the RFP, all proposed work involved in this contract should be implemented and completed within four weeks before the event and two weeks after. When/if the successful applicant signs an agreement with Homes First, the date of the Strategic Planning session will be known at that point in time – therefore the Facilitator should have four weeks before that date to complete any prep and two weeks after the session for any closure.

23. What are the expectations/examples of items to be included in the appendix/appendices?

There are no expectations of appendix items. If it is felt that there needed to be additional items that help demonstrate the applicant's ability or approach for the strategic session, feel free to attach.

24. With consultant selection in late December and, presumably, work commencing at the outset of January, what is the desired end date for the project?

There is no exact desired end date however we know that we would like the work accomplished by latest February 2021.

25. Is there an appetite to augment the Board and Management's preparations with wisdom garnered from selected stakeholders (e.g., program participants, staff, community partners) via a brief stakeholder consultation? If yes, approximately how many individuals would you wish to engage?

There are no plans to include feedback/opinions from selected stakeholders however if this is felt necessary, please include it in your proposal and or in an appendix to the proposal. It may be worth mentioning that our Board is diverse and inclusive. There are residents living in our supportive housing on our Board.

26. Do you wish for the project to include the production of additional communication tools such as a strategic planning video, development of a communications strategy, etc.? Do you have in-house graphic design?

There are no expectations for additional communication tools. Please submit your concepts/strategies however you see fit. If applicants feel this would enhance the session and participant's experience, please make the case for it in your proposals or add it in an appendix. We are unsure as to what you mean by in-house graphic design – we do create our own annual reports/strategic plan document (graphic-wise, we do it in-house).

27. Can you confirm if a deliverable of this work is to develop the strategic plan document, beyond a summary of the event?

We can confirm that the deliverable of this workshop is to develop the strategic plan. If a summary of the event provides all the necessary information to form the strategic plan, then it will suffice. Please review our past strategic plan, downloadable on our website at:

www.homesfirst.com > About Us > Learn More About Us > Strategic Plan