



Canada's source for
HIV and hepatitis C
information

REQUEST FOR PROPOSALS

Strategic Planning

Contents

1. Invitation	3
2. Context	3
3. Purpose & Scope of Work	3
4. Timelines and deliverables	4
5. Consultant qualifications and considerations	4
6. Proposal requirements	5
7. Budget	6
8. Question Period	6
9. Application deadline	6

1. Invitation

CATIE is inviting qualified consultants to support and facilitate a strategic planning process to guide the organization's future. CATIE is seeking to develop and implement a three to five-year strategic plan, launched in September 2025 to begin in January 2026.

2. Context

CATIE strengthens Canada's response to HIV and hepatitis C by bridging research and practice. We connect healthcare and community-based service providers with the latest science, and promote good practices for prevention, testing, treatment and harm reduction programs.

As Canada's official knowledge broker for HIV and hepatitis C, you can count on us for up-to-date, accurate and unbiased information.

3. Purpose and Scope of Work

Guided by CATIE's Strategic Planning and Policy Committee, the consultant/consulting team will support our organization in a strategic planning process that will result in updated mission, vision, values, and a new Strategic Plan for either 3 years (2026-2029) or 5 years (2026-2031). This will require:

Working Closely with the Ontario Organizational Development Program to implement strategic planning process

The consultant/consulting team will leverage the experience and skills of the Strategic Planning and Policy Committee (made up of Board and Staff) and the Ontario Organizational Development Program to plan for and implement identified activities. Relevant documents are to be prepared by the consultant/consulting team for review by the Committee.

Engagement

The consultant/consulting team will conduct meaningful engagement with a diverse range of CATIE's key internal and external groups and communities (e.g., board, staff, community partners, funders, etc.). Engagement strategies could include surveys, interviews, focus groups, etc. Given that CATIE's communities include both English-speaking and French-speaking individuals and groups, the consultant(s) will be expected to meet the specific language needs. The Ontario Organizational Development Program with input from Management will oversee the consultation process, which will include feedback on the data gathering and methodology.

Document Review

The consultant/consulting team will undertake a document review (of appropriate internal and external reports, reviews, etc.) to gain an understanding of CATIE's current and previous work, and its operating environment.

Analysis

After synthesis of internal and external feedback, as well as the review of documents, the consultant/consulting team will apply an analytical method, using relevant tools (e.g., SWOT, PESTEL).

Development of a New Strategic Plan, including Mission, Vision, Values

The consultant/consulting team will summarize the findings of the process in a final report, which will include Strategic Priorities or Directions for three or five years, including objectives, as well as updated Mission, Vision, and Values.

This will be a virtual Strategic Planning process, with no consultant travel.

4. Timelines and deliverables

RFP released	March 15 th , 2024
Question Period	March 15 – 20 th , 2024
Proposal submission	March 26 th , 2024
Interviews	April 2 nd , 2024
Selection and awarding of contract	April 9 th , 2024
Initial meeting with CATIE to review workplan and implementation timelines	Week of April 21, 2024
Strategic Planning activities	May to October, 2024
Draft Strategic Plan report	November 2024
Final Strategic Plan report	February 2025

5. Consultant qualifications and considerations

CATIE welcomes consultants that bring the following experiences and skills to their work:

Requirements

- Demonstrated in-depth knowledge of the non-profit sector, in particular non-profit organizations that focus on knowledge exchange, capacity building, health care, HIV and STBBIs, as well as those that operate at a national level
- Significant experience with strategic planning processes
- Significant experience in engagement, with the ability to work collaboratively and engage diverse communities, in particular with 2S/LGBTQQIA+, Indigenous, Black and other racialized communities, Francophone communities
- French language proficiency to ensure meaningful engagement of Francophone individuals and groups. *If core consulting team members do not have French language proficiency, some mechanisms to address this must be named (e.g., working collaboratively with a French language contractor for specific interviews and focus groups)*
- Ability to manage multiple, competing projects in order to meet deadlines and deliver high-quality final products

We will prioritize proposals from consultants who are part of Indigenous, Black and/or racialized communities.

6. Proposal requirements

The proposal should not exceed 7 pages in total (using 12 point font). Applicant CVs or resumes, as well as the sample of work can be included as appendices (with appendices not exceeding 7 pages).

The proposal should include:

1. Name and contact information
2. Applicant experience
 1. Short description of the applicant's work, including experience in similar projects and experience in engaging diverse stakeholders.
 2. A list of similar projects currently or previously undertaken can be included.
3. Proposal
 1. Overview of the applicant's understanding of the scope and requirements of the project, and the approach that the applicant will take.
 2. A work plan that takes into account the deliverables and timelines.
 3. A breakdown of the tasks, showing the amount of time each member of the consulting team will spend on this project.

4. A budget for the total cost of the work, including all personnel, materials, and other expenditures.
5. Names and contact information of two (2) references for whom the applicant has completed relevant projects.
6. 1-2 examples or samples of strategic planning related products produced by the applicant. These can be included as appendices, or with links to reports.

7. Budget

There is a maximum budget of \$30,000 (inclusive of taxes) to support the strategic planning process. As this is intended to be a virtual process, no travel or accommodation costs are planned. Should in-person consultation or travel be required which is outside the scope of this RFP, costs should be pre-approved and paid by CATIE.

8. Question Period

This RFP process includes a question period. Please submit any questions you have by March 20th, 2024 at 5pm EDT. Questions will be answered by March 22nd, 2024 at 5pm EDT.

Email: jobs@catie.ca

Subject: Questions: Strategic Planning 2024 RFP

9. Application deadline

Please submit one (1) electronic copy of your proposal by March 26th, 2024, by 5pm EDT to the Strategic Planning and Policy Committee.

Email: jobs@catie.ca

Subject: Proposal: Strategic Planning 2024 RFP