

Appendix D – RFP Particulars

1. The Deliverables

1.1. ISI is seeking proposals from qualified consultants to provide all services for strategic planning as further defined below and included in Appendix D1 - ISI Strategic Plan Terms of Reference. These terms of reference provide background, an overview of the proposed strategic planning process, the desired outcome and an overview of the proposed External Consultant Engagement.

1.2. Project Scope

1.2.1. The scope of this RFP includes expectations detailed in the External Consultant Engagement portion of Appendix D1.

1.2.2. Out-of-Scope

1.2.2.1. The scope of this RFP does not include.

1.2.2.1.1. Definition of Strategic Plan.

1.2.2.1.2. Implementation of Strategic Plan.

1.2.2.1.3. Resulting action items.

1.2.2.1.4. Responsibilities and timelines.

1.2.2.1.5. Publication ready documentation of the ISI Strategic Plan.

2. Mandatory Submission Requirements

2.1. Submission Form (Appendix B)

2.1.1. Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.

2.2. Pricing (Appendix C)

2.2.1. Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

2.2.2. RFP Particulars (Appendix D)

2.2.2.1. Each proposal must include the proponents Appendix D response to the rated criteria.

3. Material Disclosures

3.1. ISI and the successful proponent will strive to adhere to The Strategic Plan Terms of Reference (Appendix D1) developed by the ISI CEO and approved by the Board of Directors with exceptions for proposed and approved changes resulting from this RFP process.

4. Rated Criteria

4.1 The following is an overview of the categories and weighting for the rated criteria of the RFP. As part of the evaluation of rated criteria ISI may choose to either contact references, conduct proponent interviews, both or neither. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Rated Criteria Category	Weighting (Points)	Minimum Threshold
Experience and Qualifications	30	20
Proposed approach to meet deliverables	40	30
Pricing (see Appendix C for details)	30	n/a
Total Points	100	

Proponents should provide the following in its proposal:

4.1. Experience and Qualification

- 4.1.1. A brief description of the proponent.
- 4.1.2. A description of the services the proponent has previously and/or is currently delivering, with an emphasis on experience relevant to the Deliverables. its knowledge, skills and expertise in multi-stakeholder strategic plan development in a not-for-profit organization.
- 4.1.3. The roles and responsibilities of the proponent and any of its agents, employees and sub- contractors who will be involved in providing the Deliverables.
 - 4.1.3.1. Define the proposed team members, complete with CVs, experience and project role, assigned to each phase.
- 4.1.4. A Reference Form in accordance with the instructions set out in Appendix E - Experience and Qualifications.

4.2. Proposed approach to meet deliverables.

- 4.2.1. A description of how the proponent will provide the Deliverables, which should include a work plan and incorporate an Institutional chart indicating how the proponent intends to structure its working relationship with ISI; and
 - 4.2.1.1. **ISI Strategic Plan Terms of Reference**
 - 4.2.1.1.1. Proponents should indicate any changes proposed to Appendix D1 - ISI Strategic Plan Terms of Reference including any changes to the proposed timeline.
 - 4.2.1.1.1.1. Proponents shall indicate any changes to the timeline proposed.
 - 4.2.1.2. **Diagnostic Phase**
 - 4.2.1.2.1. Provide an overview of the proposed project plan for the Diagnostic Phase.
 - 4.2.1.2.2. Provide an overview of the proposed stakeholder engagement sessions, define medium, and anticipated outcomes. It is anticipated the most engagement session will be undertaken remotely, except for the Board of Directors meeting in October 2021.
 - 4.2.1.2.3. Outline the outcome anticipated from the Diagnostic Phase, including proposed Mission, Vision and Goals.
 - 4.2.1.3. **Strategic Orientation Phase**
 - 4.2.1.3.1. Provide an overview of the proposed project plan for the Strategic Orientation phase.
 - 4.2.1.3.2. Outline the outcome anticipated from the Strategic Orientation Phase, including the proposed ISI Strategic Plan, inclusive of the Mission, Vision, Strategic Goals.