



## Request for Proposals

# STRATEGIC PLANNING

**Issue Date:** June 12, 2026

**Closing Date:** **July 10, 2026** at 3:00pm local time

**Submit to:** Kawartha-Haliburton Children's Aid Society  
1100 Chemong Road  
Peterborough, Ontario K9H 7S2  
Attention: Joe Mahoney, Director of Corporate Services



## **TABLE OF CONTENTS**

### **1. PART 1 – INTRODUCTION**

- 1.1. Request for Proposal
- 1.2. Overview of Kawartha-Haliburton Children’s Aid Society
- 1.3. Type of Contract for Deliverables

### **2. PART 2 – REQUIREMENTS**

- 2.1. Requirements
- 2.2. Interviews
- 2.3. Engagement Deliverables
- 2.4. Contract Pricing

### **3. PART 3 – EVALUATION OF PROPOSALS**

- 3.1. Rating Criteria
- 3.2. Evaluation of Pricing

### **4. PART 4 – TIMETABLE**

### **APPENDIX A – Form of Offer**

## 1. PART 1 – INTRODUCTION

### 1.1. Request for Proposal

The Kawartha-Haliburton Children’s Aid Society is seeking proposals for consultation services to support the Board of Directors in developing a new Strategic Planning for the Kawartha- Haliburton Children’s Aid Society (the “Society”) to be approved by the Board of Directors on January 13<sup>th</sup>, 2026 for implementation commencing April 1, 2027.

The Kawartha-Haliburton Children’s Aid Society (**the “Society”**) is an Ontario corporation operating as a registered Charity, whose principal mandate is to protect the children and youth from abuse and neglect. Its catchment area consists of the Cities of Peterborough and Kawartha Lakes and the Counties of Peterborough and Haliburton. Principal funding is provided by the Province of Ontario and the Society operates under provisions of the Child, Youth and Family Services Act.

### 1.2. Overview of the Kawartha-Haliburton Children’s Aid Society

The Ontario Ministry of Community, Children and Social Services of Ontario (the “Ministry”) contracts with the Society as a transfer payment agency for the delivery of legislated Child Welfare Services. In fiscal 2025-2026, the core funding provided to the Society was about \$21.6 million.

The Society is governed by an independent volunteer Board of Directors, who are also its members and represent a cross section of disciplines necessary for effective governance. This structure allows it to be accountable to the Ministry and to the community it serves.

For the year ended March 31<sup>st</sup>, 2026, the Society provided service to children and youth aged 0 – 22, received 1,386 reported concerns regarding the protection of children and opened 1,274 investigations. The Society provided ongoing services to 227 families as of March 31, 2026, supported 133 children in the care of the Society, many who are placed in the 25 foster homes operated by the Society, and finalized 11 adoptions.

The Society employs approximately 106 staff and has approximately 35 volunteers, delivering services from its main office in Peterborough and from branch offices in Lindsay and Haliburton. The primary services offered include:

- Child protection services
- Kinship Services
- Child in care services
- Legal services
- Continuing Care and Support for Youth
- Adoption services and other forms of Permanency for children and youth
- Volunteer support services
- Foster and Kinship care services

For a more detailed overview of our mandate, programs and services, please visit our website at [www.khcas.on.ca](http://www.khcas.on.ca).

The last strategic plan was developed in 2019 and spanned a period of three (3) years commencing April 1, 2020. During the three (3) year period spanning the Strategic Plan, the COVID pandemic occurred resulting in significant disruption to the plans projects such that the Board agreed to extend the plan for one (1) additional year ending March 31, 2024. The plan has been subsequently extended for each additional year to March 31, 2026. Over the course of the past few years, the Society has been working towards implementing a new service delivery framework – Signs of Safety – a framework that is strength based, solution focused that values relationships with families and involves the wider family support network. The service model was also reviewed with a re-organization of work functions across the service delivery continuum to provide enhanced service to children in out of home placement and resource caregivers. The Society is also focused on evolving Equity, Diversity and Inclusion within the service context as well as within the organizational culture for staff and volunteers. Work also remains focused on restoring the mandate for delivery of services to Indigenous communities through commitments made towards Truth and Reconciliation. Focus also continues for the Society to find a pathway towards financial sustainability.

### **1.3. Type of Contract for Deliverables**

Where a firm is selected from this process, they will be required to provide services outlined in Part 2. Firms shall be deemed to have reviewed the Standard Terms and Conditions of the Society found on the Society website.

## **2. PART 2 – REQUIREMENTS**

### **2.1. Requirements**

To be considered for evaluation, the firm must provide a service proposal in the following fashion:

1. Proposals must be submitted to the attention of the Director of Corporate Services before 3 pm on **July 10, 2026**.
2. The Form of Offer (Appendix A) will be included as part of the proposal.

3. An outline of qualifications must be prepared, minimally containing the following information:
  - a. Experience of the engagement principal in providing strategic planning services to an Ontario children's aid society;
  - b. Experience of the engagement principal in providing strategic planning services to business organizations which are not-for-profit.
  - c. Details of the resources available to the engagement principal from within their firm to support providing strategic planning services to the Society
  - d. An overview of the organization and the firm's engagement with the community to consult on emerging issues which might affect child welfare organization
  - e. "Curriculum vitae" for all individuals of the firms who would be significantly involved (specifically identifying their previous work in providing strategic planning services)
  - f. A proposed timeline for providing strategic planning services with a goal of meeting presenting a final draft to the Executive Director and Board Representatives by December 11, 2026, and then to the full Board of Directors by January 13, 2027
  - g. an outline of similar engagements performed by the firm in the preceding three years, with reference to work completed for child welfare agencies
  - h. An outline of the approach and methodology being recommended for completion of the strategic planning process
  - i. An outline of the resources to be provided by the Society which the firm expects to need if its proposal is accepted. This should include Board of Director time, Executive Director and staff support
  - j. Any foreseeable limitation or concern identified by the firm in the course of preparing its proposal

## 2.2 Interviews

Upon completing the evaluation of the outline prepared by the firm, the Society, may interview the Engagement Principal to obtain further information to assess their suitability to complete the engagement deliverables.

## 2.3 Engagement Deliverables for the Society

- a. The Facilitator will work under the direction of the Society's Executive Director and will acquire sufficient organization-specific knowledge to complete the assignment in a professional manner.
- b. The Facilitator will apply their expertise to guide and facilitate the renewal of the Society's Mission, Vision and Values in consultation with the Board and Executive Director.
- c. To inform the development of the strategic plan, the Facilitator will use existing forums, documents and reports to work with the Executive Director and Board Strategic Planning lead(s) to develop an appropriate engagement strategy to solicit feedback from the stakeholders listed below. This may include but is not limited to electronic surveys and focus groups facilitated by the Service Providers and a representative from the Society. The Services Provider, upon agreement with the Executive Director and Board Strategic Planning Lead(s) will develop surveys, focus

group questions, organize and schedule focus-group meetings with the Society's stakeholders as set out below:

- Employees, Society Ujima Council, Society Indigenous Circle, foster parents, youth in care, families in receipt of services, Indigenous communities and partnership service providers (one) and the leadership from community partners.
  - Review the OACAS Strategic Plan and align the Mission, Vision and Values where appropriate with priorities of this plan.
  - Review the principles and pillars of Child Welfare Redesign, where appropriate.
  - Meet with the Board of Directors and senior leadership team to consider the Mission, Vision and Values and consider key priorities and actions to support a 3 year agency strategic and sustainment plan considering the fiscal and political environment.
- d. The Facilitator will complete a gaps analysis between the current strategic plan and the vision for the organization in consultation with the Executive Director and Board Strategic Planning Lead(s) after engaging in the steps above.
  - e. The Facilitator will develop, in consultation with the Executive Director and Board Strategic Planning Lead(s) a statement of measurable actions (scorecard) which will enable the Society to fulfill its stated mission and vision over the next three years.
  - f. The Facilitator will provide a comprehensive, final written Strategic Plan to the Board for adoption by the Board within four (4) months of awarding of this engagement.
  - g. The Facilitator will provide recommendations for the Society which will result in improving its service delivery mandate and closer alignment with community partners. The report document will be completed and submitted to the Executive Director and Strategic Planning Lead(s) no later than December 11, 2026, for Board approval on January 13<sup>th</sup>, 2027.
  - h. The firm will abide by all laws and professional regulations, will maintain professional liability insurance of at least \$5 million during its engagement, will ensure its employees will work in a safe manner and will respect the confidential information of the Society.
  - i. The firm will accept payment from the Society through electronic funds transfer.
  - j. The Society will have ownership rights to the report and all work product arising from the services provided by the Facilitator. The Facilitator will grant the Society nonexclusive rights to use specific proprietary techniques employed by the Facilitator in the execution of the deliverables.

## 2.4 Contract Pricing

- a. Prices quoted on Appendix A shall be denominated in Canadian dollars and will be all inclusive of all labour and materials, travel and carriage costs, insurance costs and all other overhead including but not limited to any fees or other charges required by law.
- b. Harmonized sales tax **is to be excluded** from the fee quotation.

- c. A proposal that includes conditional, optional, contingent or variable rates may be disqualified.
- d. The “Fees” shall be a total price for the purposes of the contract and may not be exceeded without prior written consent of the Executive Director of the Society.

### 3. PART 3 – EVALUATION OF PROPOSALS

#### 3.1 Rating Criteria

Rated Criteria Category	Weighting (Points)
Relevant experience	45 points
Capacity to provide services within timeline	15 points
Access to resources for emerging issues	10 points
<b>Total points possible</b>	<b>70 points</b>

#### 3.2 Evaluation of Pricing

Pricing will be scored based on a relative pricing formula using the Rates set out in the Rate Bid Form.

Each competing firm will receive a percentage of the total possible points (**30 points**) allocated to price by dividing that firm’s price into the lowest bid. For example, if the lowest bid price is \$500.00, that firm receives 100% of the possible points ( $500/500=100\%$ ), a firm who bids \$750.00 receives 67% of the possible points ( $500/750=67\%$ ) and a firm who bids \$1000.00 receives 50% of the possible points ( $500/1000=50\%$ ).

### 4 PART 4 – TIMETABLE

Date of Issue:	June 12, 2026
<b>Closing Date:</b> 3:00 pm Peterborough, ON (Local time)	<b>July 10, 2026</b>
Review of Proposals	July 20 – July 24, 2026
Interviews (if required)	July 27 – July 31, 2026
Offer Extended	August 14, 2026

Questions concerning this invitation must be addressed to the Finance Director of Corporate Services by June 26, 2026 by email ([joe.mahoney@kxcas.on.ca](mailto:joe.mahoney@kxcas.on.ca)) and responses will be provided with three business days.

## APPENDIX A

### Kawartha Haliburton Children’s Aid Society Strategic Planning Services

**FORM OF OFFER**

I/WE the undersigned agree to supply and deliver **Strategic Planning Services** for the fees stated.

Activity (detailed breakdown of services provided by cost)	Fees
	\$
	\$
	\$
	\$
	\$

**We hereby certify that the information given is correct and that if it is accepted, we will supply the Strategic Planning Services as described for the price quoted herein. We also confirm that we have read and understand the Society’s Standards Terms and Conditions as made available on the KHCAS website at [www.khcas.on.ca](http://www.khcas.on.ca).**

**RECEIVED FROM**

<b>Service Provider Name:</b>	
<b>Authorized Representative:</b>	
<b>Title:</b>	
<b>Date:</b>	
<b>Signature:</b>	