

## **REQUEST FOR PROPOSAL**

Hamilton Community Foundation (HCF) is seeking proposals from qualified consultants to support the Board of Directors to develop its next 5-year strategic plan.

**Submission date is March 16, 2026**

**Budget - \$20,000 - \$25,000**

### **Background**

[Hamilton Community Foundation](#) was established in 1954 as Ontario's first community foundation. With the vision of *a vibrant, diverse, and inclusive Hamilton* and a mission to *drive positive change by connecting diverse people, ideas, and resources*, HCF works to:

- Bring diverse people, ideas and resources together to address priority issues that affect Hamiltonians.
- Support all aspects of community life through grants and loans to a wide range of charitable organizations and initiatives.
- Help people give in a way that has community impact and meaning to them.

HCF's [values](#) of *Equity, Reconciliation, Courage, Relevance, Accountability, and Collaboration* describe what we care about, what guides our decision making, the behaviours people can expect from us, and what guides us in fulfilling our mandate.

Here is our [Equity statement](#) and our [Declaration of Action on Truth and Reconciliation](#) for your reference.

HCF's [board complement](#) brings a wealth of expertise, experience, and community knowledge from a broad cross section of backgrounds. As part of the regular transition cycle, the board went through a recruitment and nomination process in 2024, onboarding a number of new members, with this being their first strategic planning process at HCF.

HCF's strategic priorities for the community are outlined in this excerpt from our [strategic plan](#). HCF takes a long-term view of its strategic priorities, often making commitments in 10-year time horizons, while our strategic plan is refreshed every five years.

### **Scope of work**

The main objectives, working closely with the senior management team, at a minimum, include:

1. Discovery and background preparation to better understand HCF's purpose, culture, and context
2. Identify relevant materials to inform strategic plan development
3. Design and facilitate staff and board sessions
  - o Staff all-day session April 24, 2026
  - o Board retreat, the evening of October 27, 2026, and all-day October 28, 2026
4. Deliver finalized strategic plan document with evaluation framework

## Proposal content

If your firm is interested in submitting a proposal, please ensure it includes the following:

- Your understanding of the project and the scope of work to be accomplished
- Brief bios of team members who would be involved in the work, and the roles they would play
- Examples of your work that demonstrate your experience in supporting strategic planning processes of mature and complex community organizations, including evaluation and metrics
- Project plan and critical path/timeline. It is anticipated the work would commence **April 6, 2026**. Project plans should include a breakdown of tasks and timelines (e.g. number of days)
- Your expectations from the HCF team through each phase of work outlined in the project plan
- Fee proposal broken down by day per person, plus hourly and per diem rates for any additional services relevant to this proposal
- The names and contact information for two organizations for whom you have completed similar work in the past five years that we may contact

## Process

Submission deadline	12 p.m. March 16, 2026
Shortlisted candidates meet with staff	Week of March 23, 2026
Successful candidate informed	March 30, 2026
Contract begins	April 6, 2026

## Evaluation criteria

All proposals will be evaluated based on the following key criteria:

- Understanding of HCF context (programs, structure, and strategic objectives) and commitment to HCF mission and values
- Performance capability—the extent to which the proposal demonstrates the firm's depth and breadth of experience, skills, knowledge, sensitivity and creativity required to successfully complete this project
- Completeness and quality of response, including clear deliverables and reasonable approach
- Cost effectiveness
- References

## <sup>1</sup> RFP Terms

1. The proponent firm shall bear all costs associated with responding to this RFP.
2. HCF is not bound to explain its decisions regarding submitted proposals.
3. By accepting a proposal, HCF does not intend to bind itself legally in any way. HCF intends solely to begin negotiating a contract on the subject matter of the proposal. Unless HCF states otherwise in writing at the time, oral or written communications between the firm and HCF, the subject matter of the proposal is always to be considered subject to the execution of a formal written agreement. In addition, the execution of a contract in no way binds HCF to an ongoing relationship with the vendor. A contract should be considered as a standalone.
4. Prior to the closing date of the RFP, respondents should not establish contact with anyone (staff or board) inside the organization regarding this RFP, other than the representative identified. Failure to abide by this requirement could be grounds for rejection of your proposal.

## Background

Our website is [hamiltoncommunityfoundation.ca](http://hamiltoncommunityfoundation.ca), with more information available in our [Annual Report](#) and [fact sheet](#).

## HCF contact

Please direct all submissions and questions to:

Mary Anne Grant, Corporate Secretary

Phone: 905.523.5600 x 227

Email: [m.grant@hamiltoncommunityfoundation.ca](mailto:m.grant@hamiltoncommunityfoundation.ca)

*Hamilton Community Foundation is committed to inclusive, barrier-free procurement and selection processes. We encourage proposals from diverse populations and equity-deserving groups, including applicants who require accessibility accommodations. If contacted for a procurement opportunity, please advise us if you require an accommodation.*

---

<sup>1</sup> All materials submitted during the proposal process will remain the intellectual property of the proposing firm, and unsuccessful proposals will be destroyed prior to the commencement of the contract.