



Canadian Mental  
Health Association  
North and West Vancouver  
*Mental health for all*

North and West Vancouver Branch  
300-1835 Lonsdale Avenue  
North Vancouver, British Columbia V7M 2J8  
Phone: 604.987.6959 Fax: 604.980.0336

## Request for Proposals – Core Values and Strategic Planning

Canadian Mental Health Association (CMHA), North and West Vancouver branch is a not-for-profit, charitable organization. We provide a wide range of innovative and essential services and supports tailored to and in partnership with the communities of North and West Vancouver, Bowen Island, the Sunshine Coast and the Sea-to-Sky Corridor. For information on our programs and services visit [northwestvancouver.cmha.bc.ca](http://northwestvancouver.cmha.bc.ca)

CMHA is a federated national charity that includes a national office, provincial divisional offices and branches in community. CMHA NWV is a branch. As part of its federation-related agreements, each entity agrees to a shared mission and vision. Branches can establish their own core values and strategic plans.

***CMHA NWV is searching for a facilitator to help us establish core values and lead us on a journey of building a 3 year strategic plan – 2022-2025.***

### **Project requirements and project objectives:**

The facilitator will work with our leadership team, which includes managers and coordinators, alongside our Board of Directors to meaningfully discuss what is most important to us. Our values must be more than words; we want them to have meaning. We are striving for concepts clearly articulated in specific behaviours. The following article may provide additional clarity around this action item.

<https://nonprofit.com/2016/05/why-organizational-values-are-so-awesome-and-sexy/>

The facilitator must work within some confines around time availability and accessibility. Although we are committed to providing paid time for employees to participate, some programs have 24/7 staffing or have teams of mainly part-time employees. Scheduling will be the responsibility of the Facilitator with support from CMHA's Operations Manager and the Board Secretary.

Once the values are defined (by end of October) we will be looking to the facilitator to move us forward in the development of a 3-year strategic plan (April 1, 2022 - March 31, 2025). The Facilitator will build a process that engages staff and the Board, in partnership with the Executive Director, the Board Chair and the Diversity/Equity/Inclusion committee. Consideration needs to be given to time constraints and channels to ensure equitable participation in the processes put forward. At this time, it is out of scope to engage with external partners or collaborators but this is open for consideration.

Following the strategic planning dialogues/sessions etc., the facilitator will work with the Executive Director and CMHA's contracted graphic designer to build a one-page visual representation of the organization's strategic plan ([see example on page 15 of our annual report](#)), a longer narrative description, integrated with guiding core values. The facilitator will be involved in presenting the close-to-final product to the full team by end of January 2022. The subsequent month will be available



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to make any final changes required or to accommodate any possible delays. After February 28, 2021, further integration of the plan into existing policies/process at CMHA will transition to the leadership team.

### **Timeline:**

The timeline for this work is September 2021 to February 2022. The key deadlines are:

- Core Values Established by October 31, 2021
- Draft Strategic Plan documentation presented by Jan 31, 2022
- Final Plan created by February 28, 2022

### **Project budget**

CMHA has allocated \$12,000 for this work, based on the following assumptions:

- Development and launch of values: 25 hrs
- Strategic planning session/process and finalization of related materials: 45 hrs

Total Estimated Hours: 70 hrs

***Please note** that the above detailed are being provided to support a clear understanding around the timing and the organizational deliverables (namely the guiding values and a 3-year strategic plan). The described process is not meant to be prescriptive. We are open to the facilitator's vision and recommendation around how to structure the process, and we are interested in integrated online and in-person engagements. There is some flexibility around funding available for this work.*

### **Questions and required information:**

We are an equity employer and encourage proposals from women, persons with disabilities, members of visible minorities, First Nations, Inuit, and Metis people, people of all sexual orientation and genders and others who may contribute to our further diversification. CMHA NWV's DEI committee will work with representatives of the Board of Directors and the Executive Director to make a final decision about this RFP. Special consideration will be given to proposals from BIPOC facilitators. It is a requirement that the facilitator has demonstrated experience in working with DEI concepts and strategy.

Please submit proposals to [Julia.kaisla@cmha.bc.ca](mailto:Julia.kaisla@cmha.bc.ca) before August 15, 2021.

The successful candidate will be notified by September 10, 2021.