



STRATEGIC PLANNING

ALGOMA NURSE PRACTITIONER-LED CLINIC

OCTOBER 6, 2021

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highest standards of social
and environmental impact

Corporation

Laridae
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October 6, 2021

Dear Dominic and Board of Directors:

Re: Strategic Planning

I am pleased to submit Laridae's proposal for the Algoma Nurse Practitioner-Led Clinic (ANPLC) strategic planning process, building on the work completed over the last number of years and supporting the ANPLC in articulating a visionary future for the organization.

At Laridae, we know that non-profit organizations are not the same as private companies. Leaders of mission-driven organizations need sound advice from those who share their values and worldview. As a full-service management consulting firm with more than [200 clients](#) across Ontario, Laridae serves only non-profit organizations. We have the necessary depth and breadth of experience to ensure the success of a collaborative and rigorous strategic planning process on time and within budget.

Strategic planning requires thoughtful process design, disciplined project management, and creative engagement strategies. Our process is designed to ensure the joint development of strategies and solutions that reflect and are owned by you and your team. We will consider the needs of and engage with the communities you serve in a respectful, inclusive way. Given our expertise and proven record of success, we trust you'll see us as well positioned to support the ANPLC as the organization strives to excel in the changing healthcare landscape and improve the overall primary healthcare in the community.

Laridae would welcome the opportunity to design and facilitate the strategic planning process for ANPLC. Our proposed approaches and pricing are detailed in the proposal below.

Please let us know if you have any questions. We look forward to the opportunity to work with ANPLC.

Sincerely,

A handwritten signature in cursive script that reads "D. Rocheleau".

Danielle Rocheleau, Consultant
Laridae

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1. OVERVIEW

1.1. Understanding the Context

Nurse Practitioner-Led Clinics are a new primary health care delivery model in which Nurse Practitioners are the lead providers of primary health care, enhancing access to health care in Ontario and beyond.

As your current plan comes to a close, it is our understanding that ANPLC is looking for a new three-year strategic plan.

Receiving updated feedback from patients, staff, funders, and community partners is a priority as the organization navigates towards a post-pandemic environment and a potentially different funding environment. As such, ANPLC is currently seeking consulting services to design and execute a strategic planning process through engagement with key stakeholders. The plan will build upon ANPLC's past work and plans, providing a roadmap for the organization's path ahead.

2. PROJECT APPROACH

2.1. Methodology

The scope of this project includes planning, research, stakeholder engagement, facilitation, analysis, writing, communications, and project management.

While this proposal provides the overall project structure based on our experience and understanding of your needs, **our process will be jointly crafted**. What differentiates the Laridae approach is that we customize our work to fit your circumstances, capacity, and needs. We will develop the final schedule in consultation with you to meet your needs, schedules and availability, and other priorities.

Working Together

For completing the ANPLC strategic plan, Laridae will work with both the staff and the Board to champion the process.

Laridae's approach will support the ANPLC Board throughout the journey, as they embark on a planning journey and provide oversight of the final strategy. Coordinating these efforts with the Executive Director is, of course, critical, as they are integral to deeply informing and influencing the strategy development, and they are ultimately responsible for implementation in the years to come.

Through the engagement process, we also ensure that the voices of stakeholders are included, and that they can see themselves in the final strategic plan. We have found that bringing along stakeholders, including all Board members, throughout the project, ensures full 'buy-in' at the end, producing results that can be easily communicated and implemented because investment by participants is there from the beginning.

Meeting During the Pandemic

We anticipate that this project will be completed entirely virtually, using online tools, phone, and videoconferencing. Understanding that we are each navigating our work through a pandemic, we recognize that planning can be difficult. Over the past 19 months, we have successfully delivered facilitation, focus groups, planning, and training virtually, and are confident that we can do the same for this project. We will work with you to craft the process together and adapt as the situation continues to evolve.

If requested, and if the situation evolves to safely permit in-person planning sessions and/or engagement (based on vaccines and/or low rates of COVID-19 transmission at the time of planning), we will work with you to transition to in-person facilitation.

Developing the Strategic Plan

Our approach to strategic planning begins with a comprehensive review of key organizational documents and in-depth discussions with the Executive Director and Board, giving us a **deep understanding of the current state of ANPLC operations and processes.**

Collectively, our firm has engaged tens of thousands of people through **focus groups, key-person interviews, online surveys, and large-format engagement events**. We have engaged adults and youth through traditional and alternative formats. As facilitators, we take a strengths-based approach: recognizing, naming, and building on the ideas, passion, lived experiences that participants bring to the process. We will consult with ANPLC staff, Board, community partners, and other relevant key stakeholders. Data and comments generated through stakeholder engagement will be analyzed and presented to the relevant leadership. We will work with you to **identify and define critical issues**.

A facilitated strategic planning retreat will provide an opportunity for relevant staff and Board members to consider all relevant information, including the stakeholder input, an environmental scan, performance data, and the strengths, weaknesses, opportunities and threats facing the organization. This is the culmination of the planning process, where **consensus on strategic directions will be achieved**. Laridae's role is to facilitate decision making by the Board and ensure that all relevant information and viewpoints are included in the process.

Following the retreat, Laridae will draft the strategic plan and submit it for comments. **We work with you** to ensure that the final product meets your needs. Typically, this involves a draft followed by a revision based on your input, to create a final approved document. With professional writers on our team, we pride ourselves on clear, concise, and actionable strategic plans.

3. PROPOSED WORKPLAN

A tentative start date for this project is **late November - early December 2021** and a full process will take about four months to complete. Laridae confirms that these timelines are feasible for our team, and we are committed to meeting all project milestones and deadlines.

The work plan below is Laridae's **proposed** plan to guide the process. Three options of varying scope have been provided for your consideration.

- **Option 1:** includes a facilitated planning session and a draft plan from the notes taken from the session. In this option, there may still need elements considered by the Executive Director and board in order to finalize and approve. Please note that this option can be completed sooner than the other two offered.

- **Options 2 & 3:** a full planning process that includes stakeholder engagement, more board engagement, and a final draft plan ready for approval by the board. The difference in these two options is the level of engagement.

We will develop the final scope and schedule in consultation with you to meet your needs, availability, and other priorities.

Activities	Dec	Jan	Feb	Mar	Option 1	Option 2	Option 3
Phase 1: Planning and Research							
Kick-off call with Executive Director					✓	✓	✓
Develop a stakeholder engagement plan , including communications support, and request key documents.					--	✓	✓
Document review: Conduct a review of all existing and relevant documents.					--	✓	✓
Meeting #1 – Project Kick-off Meeting with Board: Confirm scope and activities, establish planning framework, stakeholder mapping. Finalize overall project plan. (90 minutes)					--	✓	✓
Phase 2: Stakeholder Engagement							
Focus Groups: Audiences to be determined in consultation with ANPLC but may include sessions with staff, community partners, and community members.					--	x1	x3
Key Informant Interviews: Contacts to be determined in consultation with ANPLC. Informant interviews are often best for those with high influence in the organization but limited time, such as funders, partners or allied organizations, association executives					--	x1	x2
Online Strategic Planning Survey: Stakeholder engagement survey open to all internal and external stakeholders and the broader community.					--	x1	x1
Draft Engagement Report outlining results of research and engagement.					--	✓	✓
Meeting #2 – Pre-Retreat Meeting with Board: Present Stakeholder Engagement findings and facilitate discussion to leadership and Board. (90 minutes)					--	✓	✓

Activities	Dec	Jan	Feb	Mar	Option 1	Option 2	Option 3
Environmental Scan: Support the Executive Director with the development of an internal organizational snapshot and environmental scan.					✓	✓	✓
Circulate Stakeholder Engagement Report in preparation for the planning retreats.					--	✓	✓
Phase 3: Developing the Strategic Plan							
Meeting #3: Host Planning Sessions with Board and leadership: Two 3-hour virtual sessions. First to review environmental scan, stakeholder engagement and conduct a SWOT analysis. The second includes facilitated discussions and gives shape to strategy.					✓	✓	✓
Draft Strategic Plan: Circulate to Executive Director and Board for feedback.					✓	✓	✓
Finalize Strategic Plan: Incorporate feedback and submit final version to Executive Director and Board.					--	✓	✓
Project Management: Includes regular communications, status updates, and coordination.					✓	✓	✓

4. PRICING OPTIONS

Based on our best estimate of the time required to plan, research, prepare, and complete the activities identified, Laridae’s total fees for the project outlined above are as follows:

- Option 1: \$5,850 plus HST
- Option 2: \$12,050 plus HST
- Option 3: \$14,950 plus HST

The deliverables, and the fee, will not change unless mutually agreed in writing, and in advance of work beginning. Additional work requested by the client outside the scope of this project will be billed at \$175/hour plus HST and will be mutually agreed upon in writing and in advance of such work beginning.

We anticipate that this project will be completed virtually. If requested and feasible, considering COVID-19 restrictions, there may be additional costs related to travel (billed at cost), subject to reimbursement by ANPLC.

APPENDIX A: ABOUT LARIDAE

We are committed, experienced, and easy to work with. We have extensive non-profit strategic planning, facilitation, and project management experience, with each team member bringing their engagement expertise to the table. ***Our work is primarily with non-profits in social services and community-based health.*** Furthermore, we are a Vendor of Record for the Ontario Government in eight management consulting categories, including Strategic Advisor and Strategic Public Engagement Specialist.



At Laridae, we know that non-profit and public-sector organizations are not the same as private companies. Leaders of mission-driven organizations need sound advice from those who share their values and worldview. While we are not a non-profit ourselves, [we are a proud B Corp](#) – certified to uphold the highest standards in corporate social responsibility. With over 200 clients served, our relationships run deep. Nearly 70% of Laridae’s clients come back for additional projects.

We are committed to making our work environment a safe and welcoming place. Furthermore, it important that the work that we do creates a positive social and environmental impact, and that we actively influence positive shifts in anti-racism, anti-oppression, indigenous cultural safety, and LGBTQ and gender equality. To that end, we have [made a public commitment on anti-racism.](#)

4.1. Client Experience

The Laridae team brings deep experience with and knowledge of key stakeholder groups in the **community health sector**, including:

- **Healthcare:** Canadian Association of CHCs (CACHC), Northumberland Hills Hospital, Peterborough Regional Health Centre, Georgian Nurse Practitioner-Led Clinic, Six Nations Family Health Team, Morton Family Health Centre, Indigenous Diabetes Health Circle, Quinte Children’s Treatment Centre, Canadian Association of Staff Physician Recruiters, The Canadian Partnership for Women and Children’s Health (CanWaCH)
- **Mental Health and Wellbeing:** York Hills Centre for Children, Youth and Families, Kinark Child and Family Services Ontario Association of Social Workers, Addictions and Mental Health Services - Hastings

Prince Edward, Peterborough Public Health, Student Nutrition Ontario, Peterborough Child and Family Centres, CMHA HKPR, Wellness & Emotional Support for Youth Online (WESYO), National Collaborating Centre for Methods and Tools, Canadian Hearing Services.

- **Developmental Services:** Canopy Support Services, Surrey Place, Five Counties Children’s Treatment Centre, One Kids Place, KidsAbility, Specials Needs Strategy.
- **Long Term Care and Aging Population:** Hospice Quinte, VHA Ottawa, United Way Peterborough (*Older Adult Recreation, Leisure and Facilities Study*), Community Care Northumberland, Holland Christian Homes.
- **Child Welfare:** Ontario Association of Children’s Aid Societies, Highland Shores Children’s Aid, Payukotayno – James and Hudson Bay Family Services, Dnaagdawenmag Binnoojiiyag Child & Family Services, Nipissing & Parry Sound Children’s Aid Society.

4.2. Why Laridae?

Laridae has completed complex and varied projects, as our list of more than **200 clients** demonstrates. We believe that Laridae is right firm to assist ANPLC for three primary reasons:

1. **Expertise in strategy development.** Strategic planning is core work for us. To date, we have led over 50 strategic plans – for non-profits that serve vulnerable populations, including those in a wide range of sectors such as community health, mental health and addictions, child welfare, development services, autism services, housing and homelessness, public health and more. As sought-after thought-leaders in management consulting for non-profit and public sector organizations, particularly in the health and social service sectors, we help organizations to consider all aspects of strategy development—from risk assessments to success indicators and change management frameworks. We have led countless non-profit boards through facilitated planning and strategy projects.
2. **Committed to diversity, equity and inclusion:** At Laridae, we are committed to reinforcing the values that the company was built on. That is why we have made an ongoing commitment to our community, our clients, our team and our values to continue to develop our understanding and role with engaging anti-racism in our work. Through ongoing team development, actively reflecting on our

processes, and challenging our assumptions and biases we are continually seeking ways to ensure working with Laridae is an inclusive, and supportive experience for everyone involved. Together, we know we can do better and we aim to do this in all of our initiatives. Our most recent projects in which diversity, equity and inclusion have been at the forefront of the planning include strategic planning with [York Hills Centre for Children, Youth and Families](#), with [Streams Community Hub](#).






- 3. Expertise in stakeholder engagement.** Laridae has engaged tens of thousands of people through strategic planning, community engagement, rebranding, and research projects, facilitating open – and sometimes tough – conversations. As facilitators, we use a strengths-based approach that recognizes the ideas, passions, and lived experiences of participants. We utilize a range of research and engagement methods – including market research, surveys, focus groups, town halls, and one-on-one interviews – to gather critical information and data, as well as to build relationships and educate. We are adept at customizing activities to suit the audience (size, knowledge, interests).

While this proposal provides the overall project structure, based on our experience and understanding of your needs, *our process will be jointly crafted*. **What differentiates the Laridae approach is that we customize our work** to fit your circumstances, capacity, and needs. The process is necessarily iterative, inclusive, and dynamic. Laridae has proven success in helping organizations manage change, communicate their purpose, and create innovative, achievable, and transformational plans.

Strategic planning requires thoughtful process design, disciplined project management, and creative engagement strategies. We understand that the journey is just as important as the destination. Our process has been designed and refined to maximize the ancillary benefits of the strategic planning process, which include:

- Clarifying and strengthening the organizational culture,
- Building and enhancing relationships with key partners and stakeholders, and
- Grounding the strategic plan in a comprehensive environmental scan, as well as honest and open stakeholder engagement.

4.3. Our Impact At-A-Glance

	<p>200+ Non-Profit Clients in Ontario</p>	<p>We specialize in helping social service & community health non-profits in Ontario.</p>
	<p>65% Returning Clients</p>	<p>Over 65% of our work in 2020 has been with clients who decided to return to us after the success of their initial project.</p>
	<p>60+ Strategic Plans</p>	<p>We have helped over 60 non-profit clients develop strategic plans that helped them soar.</p>
	<p>9/10 Average Client Rating</p>	<p>We received an average NPS score of 9/10, based on feedback provided by 70+ clients over the last year.</p>
<p>Certified  Corporation</p> <p>This company meets the highest standards of social and environmental impact</p>	<p>106.1 B Corp Certification Score</p>	<p>We take our values seriously. We have been certified as a B Corporation since 2018.</p>