



## PURPOSE

The Association of Municipal Managers, Clerks, and Treasurers of Ontario (AMCTO) have initiated a Request for Proposal (RFP) process to identify a qualified vendor to guide and develop AMCTO's 2027-2030 Strategic Plan and discovery phase of organizational rebranding process.

## WHO MAY RESPOND

AMCTO seeks a vendor who has demonstrated experience in successfully developing consensus-based strategic plans, has strong facilitation skills, has proven experience with non-profit strategic planning, and a strong understanding of the municipal sector and AMCTO's role within the sector.

AMCTO is also seeking vendors with knowledge and experience with organizational rebranding, particularly within the non-profit association sector.

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## 1. About the Organization

The Association of Municipal Managers, Clerks and Treasurers of Ontario (AMCTO) represents excellence in local government, management and leadership. Since 1938, AMCTO has provided education, accreditation, leadership, and management expertise for Ontario municipal professionals. With 2,200+ members working in municipalities across the province, AMCTO is Ontario's largest association of local government professionals, and the leading professional development organization for municipal professionals.

Known as 'The Municipal Experts', AMCTO offers a breadth of expertise and knowledge through year-round education and professional development programming, and through its members across a range of municipal operation areas and legislative issues. AMCTO is recognized as an influential voice for local government professionals regarding key management and legislative issues affecting the sector.

The Association continues to grow and to search out new opportunities to provide municipal professionals with the tools they need to succeed in today's continually evolving municipal environment.

AMCTO is governed by a Board of Directors (16 members) representing AMCTO's nine (9) geographic zones across Ontario. The Board is responsible for setting overall policy direction for the Association and work closely with the Executive Director to oversee implementation.

AMCTO currently employs 16 full-time staff members, organized based on subject matter portfolios and administrative responsibilities. Over the past four (4) years, AMCTO has experienced growth in its membership and overall organizational stability from both a staffing and financial perspective.

More information on the organization is available at [www.amcto.com](http://www.amcto.com).

## 2. Project Overview

In recent history, AMCTO's Strategic Plan has been renewed every four (4) years, roughly following the Ontario municipal election cycle. AMCTO's 2022-2026 Strategic Plan is set to expire in 2026.

AMCTO is looking for a consultant to engage membership, the Board and AMCTO staff in a process to create the 2027-2030 AMCTO Strategic Plan, with a focus on reviewing foundational components of the 2022-2026 Strategic Plan (vision, mission, guiding principles) and identify new sets of goals, strategic actions/initiatives and performance measures.

The project will also include the discovery phase of an organizational rebranding. This work will assist in providing the AMCTO Board of Directors with valuable information and data for future decision-making related to the organization's overall brand and place within the marketplace.

As information gathered during the rebranding discovery phase can help inform the overall strategic direction of the Association, providing guidance for the development of both the 2027-2030 Strategic Plan as well as any continued work on an organizational rebranding process, the decision was made to combine this work within one project.

### 3. Scope of Work and Deliverables

We expect the project to include the following:

- Project management
- Review of existing foundational Strategic Plan components (vision, mission, etc.)
- Develop an actionable Strategic Plan, including a goals, actions and measures
- Develop recommendations regarding the Plan's implementation and support structure
- Develop and implement an outreach plan for the 'discovery phase' of a possible organizational rebranding
- Final design and delivery of 2027-2023 Strategic Plan and related assets

It is expected that these tasks will be accomplished through a combination of activities, including:

- Background research by project lead(s) on AMCTO and current leadership team, including environmental scan of organization and opportunities ahead.
- Benchmarking with other similar sized non-profits or additional organizations with similar focus.
- Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner, member and community input.
- Facilitated group meetings with the board, staff and AMCTO to generate feedback regarding the 2027-2030 Strategic Plan and rebranding discovery phase work

The proposal should include:

- Understanding of the work to be performed, estimated hours, and other pertinent information
- Organization description, size and structure
- Qualifications of all staff to be assigned to the project and specify the project manager
- Highlights of assigned staff experience including relevant education, years and type of experience, municipal/not-for-profit background
  - If applicable, highlight any vendor support be retained as part of the project team and experience as stated above. Vendor partnerships are welcomed should the necessary skill sets and experience not reside with one vendor.

See further details in section 6 below.

### 4. Project Components

AMCTO seeks the vendor's recommendations regarding the best processes to develop an actionable Strategic Plan and rebranding discovery phase. AMCTO anticipates that the vendor will address the following components within their proposal:

- Discovery, Research and Validation - Needs assessment, gap analysis, SWOT analysis, research, etc.
- Confirmation of organizational values, operating principles, vision and mission as previously identified in the 2022-2026 Strategic Plan.
- Engagement/Consultation

- Board
- Staff
- Broader Membership
- AMCTO Zones

- Identification of strategic goals, associated actions, proposed timelines and key success measures.

Identification of any other processes or components to support the Association's strategic direction as it relates to the development of the 2027-2030 Strategic Plan and rebranding discovery phase

## 5. Ownership and Confidentiality

All intellectual property will become the property of AMCTO. All data remains the sole property of the organization. The vendor shall further agree to keep information related to any and all contracts with AMCTO in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with AMCTO unless expressly permitted by AMCTO Executive Director.

## 6. Proposal Format

To best evaluate the ability of the vendor to meet the Association's goals, please include the following in your proposal:

- Examples of similar projects
- Your approach to strategic planning
- Your approach to organizational rebranding, specifically conducting a rebranding discovery phase
- A summary of strategic planning and rebranding experience
- Three client references
- Suggested project timelines with major tasks and milestones identified
- Project budget by line item
- Sample project plan
- Identify who will be involved on your project team, their role, and relevant experience

Proposal – Must include the following:

### General Information

AMCTO understands that the scope of work requested may be conducted by a single vendor/consultant, a vendor/consultant group, or by a partnership of vendors/consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in the project. If a vendor/consultant group or partnership of vendors/consultants, the proposal should indicate who will serve as the main points of contact for the Strategic Plan development and rebranding discovery phase.

### Qualifications and Roles

The proposal must describe the vendor/consultant's qualifications to conduct the RFP scope of work and related activities, expertise, knowledge, and experience. Experience should include examples of conducting similar or related work (i.e., working with other collaborative or collective impact initiatives to create a strategic vision and strategic plan, organizational rebranding), as well as experience working with not-for-profits, smaller trade/sector associations and/or municipal corporations.

To accomplish the scope of work requested, the vendor/consultant will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Experience in leading an organizational rebranding process, particularly with initiating discovery phase work including conducting and developing market surveys and outreach
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process and understanding of organizational brand strategies
- Experience evaluating and synthesizing qualitative and quantitative data into actionable reports and project plans
- Ability to constructively challenge key stakeholders
- Experience inspiring others to think innovatively
- Project management experience
- Experience with not-for-profit sector
- Experience/understanding of municipal sector and municipal association environment

If a vendor/consultant group or partnership of vendors/consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each party will conduct as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

#### Project Plan(s)

The proposal should contain a detailed description of the activities to be conducted by the vendor/consultant to complete the requested scope of work, including:

- The specific activities to be conducted at each stage
- Timeline(s) for the activities at each stage
- Milestones, KPIs, and deliverables tied to those activities
- Detailed budget(s) for each task within a project plan(s), along with a proposed payment schedule tied to project milestones and/or deliverables.

#### References

The proposal should include at least three references of individuals who can speak to their experience working with the vendor/consultant in conducting similar projects. Information regarding each reference should include the individual's name, address, telephone number and email address.

#### Previous Work Product(s)

The proposal should include at least two examples of written/portfolio work similar to the scope of work requested within this RFP (e.g., previous final strategic plans, previous project plans related to facilitated a rebranding discovery phase.).

## 7. Scoring

Proposals will be reviewed and evaluated based on the following criteria:

- Qualifications
  - Vendor/consultant(s) has the qualifications necessary to successfully complete the scope of work identified in this RFP
  - The vendor/consultant(s) has prior experience working on similar projects
  - The vendor/consultant(s) has prior experience working with similar organizations
- Scope of Proposal
  - The proposal demonstrates an understanding of the project objectives and desired results
  - The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan and rebranding discovery phase
  - The proposal illustrates the vendor/consultant's ability to successfully execute the proposed approach(es)
- Project Plan(s)
  - The proposal adequately details project activities and milestones, or deliverables associated with each stage of the scope of work
  - The proposal includes a detailed timeline(s) for each stage
  - The work can be completed within a reasonable project timeline
- Budget
  - The proposal includes a detailed budget(s) consistent with the proposed scope of work
  - Proposed costs are reasonable and within the budget proposed for completing the work

## 8. Process for Proposal Submission and Evaluation

Instructions for submission

### a) Closing Submission Date

Proposals are due by 4:00 PM EST on Friday, August 29, 2025.

### b) Inquiries

Inquiries concerning this RFP should be directed to David Arbuckle (contact information below) no later than Monday, August 22, 2025.

**David Arbuckle, Executive Director**

**[darbuckle@amcto.com](mailto:darbuckle@amcto.com)**

### c) Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by AMCTO.

d) Submission Instructions

Proposals should be submitted in PDF format via email to [darbuckle@amcto.com](mailto:darbuckle@amcto.com) before the closing submission date and time. If the file is too large for email, a link to the file should be provided.

Late arrivals will not be accepted. Mail submissions will not be accepted.

It is the responsibility of the bidder to ensure that the response is received by AMCTO by the closing submission date. A response may be judged nonresponsive and excluded for further consideration if it is not received by the deadline or does not follow the specified format.

e) Right to Reject

AMCTO reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

f) Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, that must be indicated in the relevant section(s) of the response.

h) Notification of Selection and Timeline

It is expected that a bidder will be selected within two to three weeks of the closing submission date, although this timeline is subject to change. AMCTO reserves the right to cancel this RFP at any time. Upon conclusion of negotiations with the successful bidder, all bidders submitting responses to this RFP will be informed in writing of the name of the successful firm or individual.

RFP Released: July 14, 2025

Proposals due: August 29, 2025

Vendor selection made: In or around September 12, 2025\*

\*Vendors may be contacted by AMCTO to conduct vendor interviews in advance of final vendor selection should additional information be required.

Project begins: September/October 2025 (Date to be determined)

i) Selection Process

AMCTO will select the proposal that it feels will deliver the highest quality deliverable at the best value, based on the scoring criteria outlined in section 7 of this RFP. Proposals will be initially reviewed by the Executive Director. Selection of vendor will be made by the AMCTO Management Committee with input from the Executive Director.

j) Conflict of Interest





The Bidder must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the Contract or the services provided under the Contract. Except as otherwise disclosed in the proposal, the Bidder affirms that to the best of its knowledge there exists no actual or potential conflict between the Bidder, the Bidder's project manager(s) or its family's business or financial interests ("Interests") and the services provided under the Contract. In the event of any change in either Interests or the services provided under the Contract, the Bidder will inform AMCTO regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to the AMCTO's satisfaction or the Bidder may be disqualified from consideration under this RFP.