



## **Request for Proposal: Strategic Planning Consultant/Facilitator**

Pathwise Credit Union is seeking applications from qualified consultants/facilitators to support the ongoing development and progress in our current 5-year strategic plan and development of our next 5 years (2023-2028).

### **About Pathwise:**

Based in Durham Region, Pathwise Credit Union has served the community since 1938. Our history was built by the auto industry, and we were established as Auto Workers Credit Union. Pathwise first offered savings and loan services to 29 amazing members. For over 50 years, our credit union proudly supported the financial needs of auto workers and their families. As Oshawa has grown, we have also expanded to help strengthen the community. Our Credit Union became open bond in the 90's so anyone could bank with us.

Last year, 2020, we went through a successful rebrand. This was a lengthy process in development since 2018. We wanted to take our time and ensure we were honouring the legacy of those who have been loyal for so many years.

Our core belief is that everyone deserves a path to financial success and our purpose is to put everyone on that path. We exist to guide members through their unique financial journey, no matter where they are or what they are looking forward to.

### Values:

- Recognize & meet people where they are.
- Encourage open and transparent conversations.
- Act with integrity.
- Commit to community-based decisions.
- Humanize banking.

### **Project Description**

Working with our Senior Leadership and Board of Directors to wrap our final year of our current 5-year plan and assist us to develop a new 5-year strategic plan which identifies strategic directions, goals, and priorities to guide the work of the organization to include the following:

- Review of current Strategic Plan and its implementation;
- Assess the previous plan's goals and objectives and recommend revisions based on stakeholder feedback;
- Assist with the development of and agreement of KPI's;
- Collaborate with the Board of Directors, Board Committees, and Executive teams;
- Engage with the Board of Directors, Membership, Employees and relevant stakeholders as necessary;
- Develop a process for strategic planning session;
- Facilitate Strategic planning session;
- Identify strategies and actions to continue forward on our path; and,
- Consult on the implementation of strategic plan.



## Qualifications & Experience

The successful candidate/organization will demonstrate:

- Experience in strategic planning and facilitation with financial institutions an asset.
- Experience and knowledge related to the development of action plans.
- Experience and knowledge related to board governance and credit union regulation.
- Facilitation skills working with boards of directors, members, employees, and key stakeholders.
- Highly developed project management skills.

## Timeline

- Consultation/Engagement – July – January 2021
- Pre-Meeting – End of July 2021
- Session Preparation – September
- In-person Strategic Planning Session Facilitation – October 2021
- Final Strategic Plan Report – November 2021
- Implementation Consultation – November – January 2022

## Responses

Proposals can be brief in nature and no more than 3 pages (plus a covering letter should you choose).

Please outline the following:

- Approach to the project as outlined above;
- Your knowledge and experience related to strategic planning, KPI's, and strategic implementation;
- Your process for pre-strategic plan and preparation;
- Your cost structure and pricing;
- Two clients who would serve as references; and,
- Any other details you feel pertinent.

**All interested parties are encouraged to send their responses to Lindsay Temple, Chief Experience Officer @ [ltemple@pathwise.ca](mailto:ltemple@pathwise.ca).**

## Accommodation

In accordance with the Ontario Human Rights Code, Accessibility for Ontarians with Disabilities Act, 2005, should you require an accommodation in this process please send an email with the subject line "accommodation".