

Request for Tender to complete and Organisational Review followed by support to develop Exchange House Ireland Strategic Plan 2023-2027

Introduction

Exchange House Ireland National Traveller Service

Exchange House Ireland National Travellers Service is an organisation of Traveller and non-Travellers and a leading provider of front line and support services to some of the most marginalised Travellers in Ireland since 1980. We are a multi-disciplinary frontline service provider offering Education and Training Services, Children and Young People Services, Family Support and Crisis Intervention Services, Addiction Services and the National Traveller Mental Health Service. We also deliver partnership services through training, provision of expertise and collaborative working with other organisations providing services to Travellers in Ireland. Our aim is to break down barriers and discrimination in order to facilitate Travellers to access the range of services they need in an equitable way. Exchange House Ireland has been providing a professional standard of practice that has been shown to produce good results with our client group for over 40 years. Exchange House Ireland utilises a distinctive multi-disciplinary approach. Clients are facilitated to address their individual situation and needs under one roof where possible, and link them into additional services when this is beneficial. We work with a service user group who often face multiple social issues and barriers and have a skilled staff team throughout the organisation who can work with members of the Traveller community to facilitate positive outcomes.

Objectives

The main objectives of Tribli Company Limited by Guarantee, trading as Exchange House Ireland National Travellers Service, as set out in our constitution are:

a) to provide a range of family support services for Travellers; to support Travellers in their struggle against oppression and discrimination in promoting equal opportunities for Travellers in the areas of health, education, training, accommodation, employment and enterprise and access to leisure opportunities of their choice.

b) with subsidiary objectives:

(i) to act as agents, representatives, advisors, consultants for community organisations, whether voluntary or not, for companies, partnerships, firms and all those involved in the development of the above main objectives

(ii) to engage in providing facilities such as health and educational programmes, housing projects, (ii) the promotion and development of equal opportunities for Travellers

Current Plan and Organisational Review

The current Strategic Plan 2019 – 2022 has been extended to allow us to fully evaluate progress compared to the plan and assess where the organisation is now. It has been decided by the Board that before entering the Strategic Planning process that it would be useful to get a full review of the organisational structure, strengths, weaknesses and gaps that need to be filled. The organisation has been going through a period of growth and wants to make sure that we have all of the structural needs to continue to grow.

The current Strategic Plan has five Strategic Priorities:

- To deliver frontline services of excellence to the Traveller community that are professional and trusted
- To provide information and promote our services as one of expertise and best practice in our field
- To provide services including advocacy for individuals and families in the Traveller community and celebrate their achievements
- To work in partnership with Traveller specific and mainstream services, representative structures and funding partners to increase the capacity to deliver best services to the Traveller community
- To bring together people with a range of skills, knowledge and experience to deliver best practice in all our services. To invest in people and provide support and advancement for those in the organisation

We would want to evaluate how well these priorities have been achieved over the past 4 years and how they would inform the next 5 years on terms of our strategic priorities.

Our Current Vision

To live in an Ireland where Travellers are fully valued as a distinct ethnic minority receiving equitable treatment and access to all supports and services without barriers

Our Current Mission

Exchange House Ireland is an organisation of Travellers and non-Travellers working together to provide frontline services of excellence to the community. We also strive to work with partner agencies to improve service standards and accessibility for the Traveller community to all services

Core Principles

In all of our work, we are guided by the principles of:

- Professionalism
- Equality
- Diversity
- Excellence

Context

The Exchange House Ireland Board see 2023 as a time to take stock of our progress against the current strategy as well as identify achievements and shifts since the creation of the last plan in 2019. Added to this, the external context (political, economic, social, technological, environmental, legal) has changed, and we want to understand how to best respond. Our aim is that by autumn 2023 we will (a) understand the strengths and weaknesses of our current structures; (b) understand how we have fared against the current Strategic Priorities; (c) have pinpointed where we believe Exchange House Ireland can make the most significant contribution in serving the Traveller community in Ireland. The organisational review and planning exercise will involve the management team, the full staff team, the Board, service users, funding partners, partner agencies and other identified key stakeholders.

Requirements

We are seeking to retain a Consultant(s) to undertake a full organisational review and support the development of a Strategic Plan for the years 2023 to 2027. The organisational review should look at the organisational structure and how our four main services are currently functioning. It should identify strengths and weaknesses in our organisation and identify potential gaps that need to be prioritised moving forward. It is envisaged that the new strategic plan will need to include vision, mission, goals, objectives and to provide clear measures of success, target groups, target areas, strategic approaches and activities/projects.

Specifically, these are the outputs we require:

- Organisational Review – identify current strengths and weaknesses in the current structure of the organisation. Identify gaps in the current structures as well as any inequalities in comparison to similar organisations. It is important to also identify opportunities that exist to feed into the strategic planning process.
- Evaluate the organisations ability to withstand any further growth and identify areas of specific risks in current structure, communication and decision making.
- Evaluate success of current plan - to complete a comprehensive Review of our performance against the current strategy; and to facilitate Board and Staff engagement with the results. The review outcomes will form the basis for the priorities selected in the Strategic Plan.
- To facilitate the development of a 5-year Strategic Plan for Exchange House Ireland (2023-2027), and to facilitate Board and Staff engagement with the outline proposals.
- To engage effectively with the Board, all staff, service users and other key stakeholders to develop a shared vision, mission, and strategy.
- To strengthen learning for key staff and board members with respect to leadership, teamwork, culture, developing and implementing strategy, effective communication, collaboration, and structures.
- Together with the CEO to present a completed strategy document to Exchange House Ireland Board by the end of September 2023.

Timeframe and Process

It is envisaged that the successful tenderer will deliver work in two phases:

- Start of April to end May 2023 will focus on organisational reviewing and review of the current Strategy,
- June – August 2023 - the second phase will be to support the creation of the next Strategic Plan.
- Provide a draft strategic plan by the start of September 2023
- The new Strategic Plan should be ready to be launched in conjunction with the CEO by the end of September 2023

Accountability and Management

The contract for services lies with Exchange House Ireland. The primary point of contact for the successful tenderer will be Kevin Burn, CEO, Exchange House Ireland. The successful tenderer will be expected to:

- Maintain regular contact with the CEO, responding to communications in a timely manner
- Be flexible and responsive to the needs of the organisation as they arise
- Be proactive in seeking clarification, information or guidance as needed

Competency and Expertise Requirements

- an understanding of development issues generally
- an understanding of organisational issues
- a proven track record in project management
- insight and empathy
- authority/credibility
- experience in running strategic planning processes
- a good reputation with previous clients
- conflict management skills and confidence about handling conflict
- ability to help clarify our outcomes
- a commitment to helping us reach our desired outcomes
- honesty and fairness
- logic, self-discipline and the ability to operate systematically
- commitment to deadlines
- verbal and written skills
- a style that suits our organisation, and
- reasonable rates, measured against market prices

Tender Requirements

Tenders for this work must include:

- Name of applicant / organisation name, address and contact details. In the case of an organisation, please assign one person as the principal contact
- A statement outlining the understanding of the brief (max 1000 words)
- Personnel involved – details of all personnel who will be involved, including a CV which outlines their qualifications/experience
- Description of proposed project approach, methodology, actions and timeframe (max. 1500 words)
- Examples of two relevant previous projects along with a separate referee for each, including contact details, for both projects
- Costs – detailed costs including any associated costs, VAT inclusive (approximate budget of €10,000)
- Notification of any potential conflicts of interest
- An up-to-date copy of the tenderer's Tax Clearance Certificate and relevant insurances.
- Signed Declaration of all the above

Evaluation of Tender Submissions

Evaluations of Tender submissions will be based on criteria specified in the Tender requirements, using the following award criteria:

- Understanding the Brief 20%
- Relevant Knowledge, Expertise, Experience, Project Management and Resources Allocated 30%
- Content and Quality of Proposed Plan and Methodology 30%
- Cost 20%

Total marks 100%

Tenderers must achieve a minimum score of 60% of the total marks available for each of the individual qualitative criteria.

Any Tender which does not meet this minimum threshold shall be excluded from further consideration.

1. Understanding the Brief

Those tendering should demonstrate in their proposals a good understanding of the brief and issues which this strategic plan is seeking to address, including an excellent understanding of issues relating to strategic planning, NGOs, the Traveller community in Ireland and the main issues they face

2. Relevant Knowledge, Expertise, Experience and Resources Allocated

The highest scores will be awarded to the tenderers with the most appropriate knowledge and experience in delivering similar projects. The tenderer must supply a CV of the person who will be carrying out the work.

3. Content and Quality of Proposed Plan and Methodology

This refers to the proposed approach to the design and development given the content in this Request for Tender. Tenderers must demonstrate their capability to bring the contract to a satisfactory conclusion by describing the methodology of approach to accomplish the project's required outcomes within the stated timeframe.

4. Cost This must include all costs and expenses for the work. Quotations should be inclusive of VAT and in Euro. All prices quotes must remain valid for the duration of the work. (approximate budget of €10,000)

A Tender assessment panel will assess the applications and to award the contract to the successful tenderer. The panel will have to be satisfied that the method and programme of work meet the requirements outlined and are cost effective. The panel does not commit itself to accepting the lowest Tender and will not accept any responsibility for any expenses incurred in the preparation and submission of a Tender. The panel may cancel the process at any time. Exchange House Ireland will not engage in any discussions or negotiations in advance of adjudication. Following completion of the Tender evaluation, the successful tenderer will be notified in writing by email. Once the offer is accepted, emails will be issued to the unsuccessful tenderer/s notifying them of the result. Exchange House Ireland is not in a position to provide feedback on unsuccessful tenders.

Shortlisting

A shortlist of applicants may be invited to present or provide further information on their bid prior to selection. An invitation to interview will not be an indication that a contract has been awarded. Applicants attending such interviews will do so at their own cost.

Budget and Schedule of Payments

A payment schedule will be agreed with the successful tenderer prior to the commencement of the work based on project deliverables.

Insurance

The successful tenderer must produce evidence of professional indemnity as part of the Tender submission and this cover needs to be in place for the duration of the contract for work.

Conflicts of Interest

Any conflicts of interest involving a tenderer must be fully disclosed in a timely manner to Exchange House Ireland. Failure to disclose a conflict-of-interest may disqualify a bidder or invalidate an award of contract, depending on when the conflict of-interest comes to light. If no conflict of interest exists, tenderers must indicate that in writing.

Ownership of Material Resulting from this Work

Exchange House Ireland will retain ownership of research, materials and/or documentation resulting from the development of the strategic plan. All research, materials and/or documentation must be returned to Exchange House Ireland on request or in the event that the contract is terminated. No part of the research, materials and/or documentation may be used without the prior consent of Exchange House Ireland.

Closing Date for Receipt of Tender

The closing date for receipt of the Tender to Exchange House Ireland is 5pm on Monday 13th March 2023. Any tenders received after this time and date will not be considered for adjudication.

Tenders should be sent by email to kevin.burn@exchangehouse.ie by 5pm on Monday 13th March 2023.