

## **About William Osler Health System**

William Osler Health System (Osler) is a diverse multi-site healthcare organization serving the residents of the Central West region including North Etobicoke, Brampton, Caledon and the surrounding communities. The organization has three hospitals and two specialized care centers – Etobicoke General Hospital (EGH), Brampton Civic Hospital (BCH), Peel Memorial Centre for Integrated Health & Wellness (PMC), a Reactivation Care Unit, and a Withdrawal Management Centre.

Osler is a distinguished hospital system with a vision of patient-inspired health care without boundaries. Committed to providing innovative health care delivered with compassion, Osler has been globally recognized as a Best Practice Spotlight Organization. In addition, Osler has achieved exemplary Standing with Accreditation Canada.

Serving one of the most culturally diverse and fastest growing populations in Ontario, Osler is eager about the future. With significant transformation on the horizon, Osler has a distinctive opportunity to differentiate itself and strengthen its identity as a leading academic health system in Ontario.

For more information, <https://www.williamoslerhs.ca/en/index.aspx>  
Follow us on Twitter [@Osler Health](#)

## **Project Overview:**

### **Opportunity & Scope:**

The key objective of this Request for Proposal (RFP) is to obtain professional services from a highly qualified, experienced firm that can provide the services as described within this RFP and complete the project deliverables for William Osler Health System.

The scope of the work is to lead the development of a new strategy and corresponding strategic plan for Osler. The professional will be responsible to conduct an environmental scan including SWOT/PESTLE and related analyses, lead stakeholder engagement activities, provide and justify recommendations with evidence, and champion the strategy with key stakeholders. The final deliverable is a new strategic plan that clearly articulates a compelling vision for the organization's future.

William Osler Health System's current Strategic Plan was developed in 2018/19. Since 2019, our Strategic Plan, *Going Beyond for Healthier Communities*, has guided William Osler Health

System's journey of placing the patient at the heart of what we do to collectively deliver innovative, compassionate care.

The organization continues to focus on four strategic directions:

- 1) Quality Excellence: Commit to delivering safe, compassionate, high-quality care every time.
- 2) Organizational Effectiveness: Optimize value through efficient and effective use of resources to deliver health care our communities can rely on.
- 3) Health System Leadership: Create the environmental conditions that change the way our patients and community access and engage with their health care.
- 4) People & Culture: Cultivate an organizational culture that inspires the people of Osler to be their best and do their best.

Osler's core values of Respect, Excellence, Service, Compassion, Innovation, and Collaboration, inspire the organization to achieve our Mission and Vision.

With significant transformation ahead, it is a pivotal time for William Osler Health System to engage in a review of its current strategic plan and develop a new plan that defines the future of Osler. This transformation includes becoming an Academic Health Centre, developing a new Peel Memorial Hospital, modernizing the Hospital Information System, and expanding regional services to become a Regional Cancer Care Centre. With these milestones already on the horizon, the new strategy must create a compelling vision and narrative for providers, patients, and partners, top entice them to continue to choose Osler as the place they work, receive care, and partner with.

Osler is seeking external expertise and professional services to support the Strategy Management Office. The role of the external service provider will be to provide and execute a project plan that 1) evaluates the current strategic plan and its relevancy in the emerging healthcare landscape, 2) conduct stakeholder engagement to validate priorities for the future and construct a narrative that galvanizes the organization, and 3) ensures alignment with the transformation of Osler in coming years.

### **Key Objectives:**

- 1) Produce discovery deliverables to create the strategic plan under the direction of the Strategy Management Office
- 2) Lead the review of current strategic plan and provide recommendations (with evidence-based justifications) about:
  - Mission

- Vision
- Values
- Promise
- Strategic Directions
- Key Strategic Initiatives

3) Craft a new strategic plan that is validated by meaningful stakeholder engagement, environmental and organizational analysis, and supporting data.

### **Actions and Deliverables:**

To achieve these objectives the vendor will undertake a planning process that includes the below deliverables and actions:

- Review current state using background documents including, but not limited to:
  - 2019/24 Corporate Strategic Plan: Going Beyond for Healthier Communities
  - 2022/23 Annual Report and prior reports
  - Leger Community Surveys
  - McLean & Company Employee Engagement Surveys
  - TMU School of Medicine Letter of Intent
  - Central West Ontario Health Team Strategic Plan
  - Other documents as required (i.e., clinical program/department clinical priorities plan)
- Devise a detailed, comprehensive **project plan**, outlining dates and timelines for engagements, deliverables and presentations. The vendor will also be responsible for the development of key project materials and deliverables as required to make the initiative a success.
- Conduct and provide an **Environmental Scan document** (including SWOT, PESTLE) of Ministry of Health, Ontario Health and William Osler Health System peer hospitals regarding trends, forecasts and future impacts:
  - William Osler peer hospitals include community integrator hospital systems within the GTA; number of beds (600+); annual operating budget (\$500M-\$1B); multiple discreet sites and community centered teaching hospitals.
  - Peer hospitals including Halton Healthcare, Humber River Hospital, Mackenzie Health, Trillium Health Partners; St. Mikes Hospital and UNITY Health; Hamilton Health Sciences, London Health Sciences Centre, and Kingston Health Sciences Centre.

- Develop and implement a **Stakeholder Engagement Framework and Consultation plan**. Guide the Stakeholder Engagement sessions and produce deliverables with key findings. Consider the use of advanced technology for convenient engagement where possible, and ensure approaches are catered to the stakeholder group(s) to ensure meaningful engagement. Attention should be given to SWOT analysis and risk assessment feedback.

- Internal and external stakeholder consultations shall include and not be limited to:

- 1) Strategy Management Office
- 2) Board of Directors
- 3) President & CEO and the Chief of Staff
- 4) Medical Advisory Committee
- 5) Executive Team and Director of Communications
- 6) Staff & Physicians
- 7) Patient Family Advisor(s)
- 8) Volunteers
- 9) Academic Partners: Toronto Metropolitan University, Humber College, Sheridan College, and McMaster University
- 10) The Central West Ontario Health Team
- 11) Others as determined

- Generate and synthesize an analysis of the current strategic plan with a **summary report of common themes**, including a gap analysis; to meet the future needs of the organization and respond to Ontario's evolving health system climate.
- Provide **strong justifications using visuals and data** for **recommendations** when possible. Direct the development of draft recommendations on refreshed and/or new strategy components (mission, vision, values, and strategic priorities).
- Cultivate the development of an internal and external communication strategy.
- Provide **weekly reports** to the Strategy Management Office (written and/or verbal).
- Provide **presentations as requested** to the Strategy Management Office, Board of Directors, Executive Team, Manager Information Sessions, Medical Advisory Committee, and others as required.
- Facilitate Executive Team dialogue and agreement to ensure fully team support on all aspect of the future strategic plan

#### *Additional Notes*

- *Ensure alignment with Central West Ontario Health Team objectives and activities.*
- *The Strategic Plan will cover three to five years in duration (the successful firm to advise on exact timeline).*

## **Interim and Final Deliverables:**

The vendor will be required to produce and review the below interim deliverables with the Project Lead and other Management as required.

- Detailed project plan (dynamic document)
- Weekly status reports
- Workshop and engagement materials (agenda, facilitation guide/thought prompts and presentations)
- Presentations for Board, Executive Team and Management meetings (as may be required)

At the conclusion of the engagement the vendor will be assessed on the following deliverables:

### **1) Environmental Scan**

- Conduct an environmental scan including SWOT/PESTLE analyses and other components, and document it in a report that clearly informs the development of the new strategic plan.

### **2) Stakeholder Engagement**

- Develop and implement a stakeholder engagement plan, to be approved by the Strategy Management Office.
- Facilitate engagement sessions with all relevant stakeholders.
- Create a strategic consultation summary report including analysis of stakeholder feedback into key themes.
- Create a communication strategy document to close the loop on engagement/consultation sessions to communicate to key stakeholder groups how their input was used.

### **3) New Strategic Plan**

- Finalized write-up of a new strategic plan document that is supported and justified by:
  - An analysis of the current strategic plan including current gaps.
  - Insights from stakeholder consultations and environmental scan.
  - Data, evidence and effective visuals to justify recommendations.
- Strategic plan implementation key messages document that outlines all stakeholder groups, key messages that align to the interests of each stakeholder group to generate enthusiasm and support for the plan, and justifications for key messages

#### **4) Overall Approach, Professionalism, and Project Administration**

- Timeliness and efficacy of detailed project plan (dynamic document) and proactive, reliable weekly status reports
- Collaboration with Strategy Management Office to ensure a high-touchpoint approach with prompt attentiveness and responsiveness
- Preparation of workshop and engagement materials (agenda, facilitation guide/thought prompts and presentations) well in advance
- Delivery of presentation and reports to key stakeholders (Board, Partners, Service Providers, Patients, Community, etc.) where required

#### **Presentations:**

Interim and/or final presentations will be required to be given to the Strategy Management Office, Board of Directors, Executive Team, Management Information Network, Medical Advisory Committee, and others as required.

#### **Timelines:**

The project work is expected to commence at the beginning of October 2023.

A draft report is anticipated to be completed / presented on or before February 12, 2024.

The final report is anticipated to be completed and presented to the Executive Team/Strategy Management Office/Board by no later than March 13, 2024.

Completion of the project deliverables is anticipated to be within three (3) to six (6) months of the project start date, with submission of the final report to the Board by no later than March 27, 2024.

The timeline may change upon mutual approval.