



OrKidstra Ambassadors

Angela Hewitt, CC, OBE,
Internationally acclaimed pianist

Alexander Shelley,
Internationally renowned conductor

Kellylee Evans
JUNO award-winning musician

REQUEST FOR PROPOSALS (RFP)

Strategic Plan Refresh & Facilitation

Crescendo | 2027–2030 strategic planning cycle

Issued: October 27, 2026 • Proposals due: November 30, 2026

Request for Proposal

OrKidstra – Sistema Ottawa (OrKidstra) invites proposals from experienced facilitators to help refresh our existing three-year strategic plan, *Crescendo*. We envision a thoughtful, practical and inclusive process that draws on the perspectives of our Board, staff and broader OrKidstra community, with opportunities to incorporate feedback from key interest holders. Building on the planning, decisions and commitments already in place, we look forward to shaping a clear, achievable direction for OrKidstra over the next three years.

We are seeking a skilled facilitator to guide this focused refresh from beginning to end, coordinating key deliverables, managing timelines and keeping the process moving forward. The facilitator will bring thoughtful and insightful questions, encourage constructive dialogue, help us identify priorities and trade-offs, and synthesize the outcomes into a clear, practical written summary to inform our updated plan. We welcome a collaborative, well-organized approach that makes effective use of everyone's time and is proportionate to our organization's size, capacity and budget.

We ask recipients to treat non-public information shared during this process as confidential.

Introduction to OrKidstra

OrKidstra is a registered charity that provides social development programming through music education for children from equity-deserving communities in Ottawa. Inspired by the international El Sistema movement, OrKidstra believes in the power of music to transform lives, strengthen communities, and create opportunities for young people to thrive.

Approaching its 20th season, OrKidstra serves more than 850 children and youth from over 62 cultural and linguistic backgrounds through our in-school and after-school programs. *Our mission is to empower kids and build community through the universal language of music.* We provide children from low-income families with barrier-free group and individual music lessons, along with opportunities to develop important life skills such as respect, compassion, teamwork, and responsibility through playing and singing together.

Our work is guided by four core values: Love, Courage, Excellence & Belonging. These values shape not only the experiences we create for children and youth, but also how we work together, make decisions and build community.

OrKidstra currently operates three established after-school Hubs in West Centretown, Vanier and Heron Gate, with a fourth Hub launching in Carlington in winter 2027.

Our organization is entering a significant new chapter, shaped by two important developments: the continued growth of our programming toward the establishment of four OrKidstra Hubs across Ottawa, and our transition beyond founder-led leadership. Alongside this growth, we are thoughtfully strengthening our organizational capacity, building on our established co-leadership structure, supporting our staff, strengthening Board governance, and evolving our systems and processes to ensure we can sustain our expanding programs and serve our communities well into the future.

Together, these developments present an important opportunity to reflect on our progress, strengthen our organizational foundations, and ensure our strategic priorities support both the continued growth and long-term sustainability of OrKidstra.

More information, including **Crescendo**, is available at orkidstra.ca. Selected organizational and funding documents will be shared with the successful facilitator.

Why We Are Refreshing Crescendo

The next three years present an opportunity to balance continued growth with thoughtful organizational strengthening and stabilization. OrKidstra intends to deepen programming and community relationships at Heron Gate and Carlington, while protecting the quality, culture and sense of belonging that define our established Hubs. At the same time, we are strengthening the structures, staffing, leadership and resources needed to support a larger organization sustainably, without losing the love.

Much of our direction is already established through current multi-year funding commitments. These existing priorities and commitments will provide a foundation for deeper conversations about how we can best align our resources, strengthen our capacity, and support their successful implementation over the next three years.

The refresh should help bring these commitments together into a realistic organizational roadmap, identify any gaps, and support thoughtful decisions about priorities and available resources. We anticipate building on the existing structure and presentation of our strategic plan, with a focus on refining its content to reflect OrKidstra's evolving needs and priorities.

Areas for Strategic Reflection

- ↓ **Programming and community relationships:** responsible development of Heron Gate and Carlington; quality and consistency across four Hubs; student progression, social development, community voice and partnerships.
- ↓ **People, leadership and organizational capacity:** staff complement and executive support; succession and knowledge transfer; professional development, mentorship, clear responsibilities, manageable workloads and staff wellbeing.
- ↓ **Governance and the post-founder organization:** how the Board best supports, challenges and stewards the organization; clarity of governance and leadership responsibilities; healthy relationships, oversight and leadership development.
- ↓ **Resources and sustainability:** aligning program ambitions with operating capacity, diversified funding, systems, facilities and long-term financial resilience.
- ↓ **Prioritization and accountability:** what should remain unchanged, what needs adjustment, what can wait, and how to translate strategic direction into practical milestones and measures of success.

These themes are intended to guide the work, not prescribe its conclusions. We welcome a facilitator who can help the group surface other important considerations without unnecessarily expanding the scope.

Scope of Services

The successful consultant will work primarily with the Executive Managing Director, in consultation with the Board Chair or designated representatives. We anticipate the following core components:

- ↓ **Orientation and planning:** review Crescendo and a concise package of relevant documents (including key grant commitments); participate in an initial planning meeting with the co-leads and agree on an efficient process and agenda. Extensive independent research or a broad stakeholder consultation exercise is not required.
- ↓ **Focused pre-work:** develop a manageable set of guiding questions or a short questionnaire for Board and staff, coordinate the distribution and collection of responses in collaboration with OrKidstra, review responses, and identify key themes and points requiring discussion. Pre-work should be accessible and respectful of participants' time.
- ↓ **Staff input:** collaborate with senior leadership to plan and support a short, focused opportunity for staff engagement in advance of the main session. This may take the form of a facilitated staff conversation, a brief workshop or another practical approach that allows staff perspectives to be meaningfully reflected in the planning process. The proposed approach should be included within the core scope, with any additional or expanded engagement opportunities identified separately.
- ↓ **Board reflection:** prepare a few focused governance and post-founder leadership questions for the Board. A short Board-only session of approximately one additional hour on the same day as the main retreat, is welcome if feasible; this is not intended as a separate full-day governance retreat.
- ↓ **In-person strategic planning session:** design and facilitate approximately six hours of structured discussion in Ottawa with Board members, staff and selected stakeholders (anticipated approximately 20–25 participants). Use clear, inclusive methods that encourage meaningful participation, constructive challenge, and practical prioritization. The format and timing of breaks will be agreed together.
- ↓ **Synthesis and close-out:** collate pre-work and session feedback into a concise, actionable summary identifying areas of agreement, strategic priorities, open questions, recommended refinements to Crescendo, and suggested high-level milestones or measures. Provide one opportunity for management feedback and a final debrief.

The successful consultant will be responsible for coordinating the agreed process, managing key milestones and deliverables, and keeping OrKidstra informed of progress throughout the engagement.

OrKidstra expects to prepare and finalize the actual revised strategic plan internally, using the facilitator's summary and recommendations. Full authorship, graphic design, detailed operational implementation plans, individual performance plans, and ongoing change-management consulting are not required. Consultants may identify such services as optional, separately priced additions, but they should not be necessary to complete the core engagement.

Anticipated Timing

Our preferred window for the main in-person session is late February or early March 2027, subject to availability and final scheduling. We anticipate:

- ↓ **Following selection:** Review existing operational and strategic planning materials and hold a brief introductory meeting with select senior leadership to discuss organizational context, clarify questions, and agree on the overall approach.
- ↓ **Approximately six weeks before the session:** Work with OrKidstra to develop thoughtful guiding questions, participant pre-work, and a draft agenda for the planning session.
- ↓ **Ahead of the session:** Distribute pre-work questions to Board and staff participants, collect and synthesize responses, and identify key themes to help guide the discussion.
- ↓ **Staff engagement:** Collaborate with senior leadership on a short, focused staff discussion, or another agreed approach to staff engagement, to explore emerging themes and ensure staff perspectives are meaningfully reflected in the planning process.
- ↓ **February/March 2027:** Facilitate the main six-hour in-person strategic planning session, with the possibility of an additional Board-focused hour on the same day.
- ↓ **Within approximately two weeks afterwards:** Provide a concise written summary of findings, emerging priorities and recommendations, incorporate one round of consolidated feedback, and participate in a final debrief with senior leadership.

The successful consultant and OrKidstra will agree on a practical schedule that respects staff capacity, minimizes disruption to program delivery, and makes effective use of participants' time.

Budget and Fees

We anticipate a professional-fee budget of up to approximately \$10,000 CAD, excluding applicable HST. This is intended as a guide to the scale of the engagement, rather than a target fee. We welcome thoughtful, proportionate proposals at a range of price points, and will assess overall value, relevant experience and fit. Please provide a clear fixed-fee breakdown covering the core scope, identify travel or other expenses separately, and price any optional components independently. If a proposed approach cannot reasonably be delivered within this budget, please explain the trade-offs and suggest a practical alternative.

We envision a focused, collaborative process that builds on OrKidstra's existing strategic foundation and the considerable work already underway. The engagement will centre on thoughtful preparation, meaningful discussions with our Board and staff, skilled facilitation, and a clear synthesis of findings and recommendations that OrKidstra can use to guide the refresh of its strategic plan.

Selection Criteria

- ♪ Demonstrated experience facilitating practical strategic planning with charitable or nonprofit organizations, ideally in the arts, community or youth-serving sectors.
- ♪ Ability to work effectively with both staff and a governance Board, including through leadership transition and organizational growth.
- ♪ Strong facilitation, listening, synthesis and consensus-building skills, with the confidence to ask thoughtful and challenging questions.
- ♪ A proportionate, inclusive and realistic approach to the scope and deliverables.
- ♪ Clear pricing, relevant references, and a strong working fit with OrKidstra's values and culture.

Proposal Requirements

Please provide a concise proposal (approximately 3–5 pages) including:

- ♪ Brief facilitator profile and relevant experience, with examples of similar engagements.
- ♪ Proposed process, including pre-work, the main session, any focused staff or Board component, and final deliverables.
- ♪ Proposed timeline and availability.
- ♪ Itemized fixed project fee, expenses, HST and any clearly identified optional services.
- ♪ Two relevant references or examples of comparable work (we will contact references only after advising you).

Equity, Diversity, Inclusion & Accessibility

OrKidstra is committed to diversity, equity, inclusion and belonging in our work and in our engagement with external consultants and service providers. We enthusiastically encourage proposals from Indigenous Peoples, newcomers to Canada, IBPOC, persons with disabilities, 2SLGBTQ+ individuals, and members of racialized and marginalized groups. We believe our community is stronger when it benefits from the understanding and wisdom of people with diverse lived experiences representative of the communities we serve.

OrKidstra is a place of belonging. We are committed to a fair and accessible selection process and welcome requests for accommodation. We also ask that the successful consultant bring an inclusive, respectful approach to facilitating conversations with our Board and staff.

Contact Information & Response Delivery Instructions

Please submit proposals and any questions to:

Carrie Lauzon, Executive Managing Director
OrKidstra – Sistema Ottawa
carrieolivo@orkidstra.ca

Proposal deadline: November 30, 2026

OrKidstra may invite shortlisted consultants to a brief discussion to clarify their approach. We thank you for your interest in helping OrKidstra build on the strength of Crescendo as we enter our next chapter.