

Request for Proposals (RFP)

Consultant to Facilitate Development of OCI's 2027-2031 Strategic Plan

Introduction

The Ontario Centre of Innovation (OCI) is seeking proposals from qualified consultants to facilitate and support the development of OCI's 2027-2031 Strategic Plan. The process will be led collaboratively by OCI's Board of Directors, Chief Executive Officer, and senior management, with input from staff and selected external stakeholders. The consultant will provide analysis, facilitation, synthesis, and strategic planning support to help OCI develop a clear, focused, and actionable five-year strategy.

The process will begin with an initial facilitated Board strategy session on Wednesday, November 25, 2026. The successful proponent must be available to prepare for and facilitate this session, which will frame the key strategic questions, opportunities, risks, and areas requiring further analysis and engagement.

Background

For over 39 years, OCI has supported Ontario's innovation ecosystem by bringing together industry, academic, and government partners to co-invest in R&D, technology development, commercialization, and adoption. OCI is a non-profit organization funded by the Government of Ontario and also receives funding from the Government of Canada. The new strategy should reflect OCI's mandate and impact while responding to evolving economic, technology, policy, and innovation priorities.

Website: www.oc-innovation.ca

Scope of Work

The consultant will facilitate and support a collaborative, evidence-informed strategic planning process led by OCI's Board of Directors and senior management. The consultant will provide analysis, facilitate strategic discussions, engage stakeholders, synthesize findings, and support OCI in translating the resulting direction into a clear and actionable 2027-2031 Strategic Plan.

1. Preparation & Board Strategy Session

- Review OCI's current strategic plan, mandate, program portfolio, performance information, relevant Board materials, and key provincial and federal priorities.
- Meet with the CEO and senior management to confirm the key strategic questions, desired outcomes, and approach.

- Design and facilitate the November 25, 2026 Board strategy session, including the agenda, pre-read, exercises, and materials. The session should identify strategic choices, priorities, opportunities, risks, and the questions requiring further analysis.
- Provide a concise summary of the Board session, including initial strategic questions, hypotheses, priorities for further analysis, and direction for the next phase of work.

2. Strategic Analysis & Stakeholder Engagement

- Conduct a focused environmental scan of relevant economic, technology, policy, funding, R&D, commercialization, and innovation trends through 2031, including selected peer or comparator organizations where useful.
- Engage a targeted mix of internal and external stakeholders, including Board members, management, staff, government partners, industry, postsecondary institutions, investors, and innovation ecosystem partners, as appropriate.
- Synthesize the evidence and stakeholder input into the principal strategic opportunities, risks, trade-offs, and choices for OCI.

3. Strategy Development & Validation

- Develop strategic options and a proposed framework for 2027-2031 based on the Board's initial direction, research, and stakeholder engagement.
- Work collaboratively with the CEO and senior management to test and refine strategic choices, priorities, intended outcomes, and supporting objectives.
- Prepare for and facilitate a second Board strategy session to present key findings, strategic options, and trade-offs, and obtain Board direction on the proposed strategic framework.
- Review OCI's vision, mission, mandate, and value proposition and recommend changes only where they materially strengthen strategic clarity; prepare a draft strategic plan reflecting the direction established by the Board and management.

4. Implementation & Final Plan

- Develop a high-level implementation and performance framework linking strategic priorities to outcomes, key measures, and annual planning.
- Incorporate feedback from management and the Board and deliver the final strategic plan, executive summary, implementation/performance framework, and presentation materials in editable and publication-ready formats.

- Present the proposed final 2027-2031 Strategic Plan to the OCI Board of Directors and support the Board's final review and approval.

Key Deliverables

- Initial Board strategy session agenda, pre-read, facilitation materials, and session summary.
- Environmental scan and stakeholder findings summary.
- Strategic options, proposed 2027-2031 strategic framework, and materials for the second Board strategy session.
- Draft strategic plan for Board and management review.
- Final strategic plan, executive summary, implementation/performance framework, and final Board presentation deck.

Consultant Qualifications

Proponents should demonstrate:

- Significant experience leading strategic planning and Board facilitation for public-sector, not-for-profit, innovation, economic development, research, commercialization, or comparable organizations.
- Strong knowledge of Ontario's innovation ecosystem and the roles of government, industry, postsecondary institutions, investors, and innovation intermediaries.
- Demonstrated ability to translate research and diverse stakeholder perspectives into clear strategic choices, priorities, and measurable outcomes.
- Strong stakeholder engagement, facilitation, project management, and communication skills.
- Ability to meet the fixed November 25, 2026 Board session date and the overall engagement timeline.

Proposal Requirements

Proposals should include:

- **Proponent information:** Company and contact information, proposed team, roles, relevant experience, and confirmation of availability for November 25, 2026.
- **Relevant experience:** Understanding of OCI's objectives and examples of comparable strategic planning engagements, including at least two client references.

- **Approach and workplan:** Proposed methodology, collaborative approach with the Board and management, approach to the two Board strategy sessions and final Board presentation, stakeholder engagement, timeline, milestones, OCI requirements, assumptions, and quality assurance.
- **Sample work:** Up to two relevant strategic planning examples or equivalent work products.
- **Pricing:** Fixed fee in CAD by phase or deliverable, including assumptions, exclusions, expenses, optional services, and applicable taxes.
- **Conflicts and AI use:** Disclosure of actual or perceived conflicts of interest and any AI tools or services proposed for use in the engagement.

Evaluation Criteria

Proposals will be evaluated using the following weighted criteria:

- Experience, qualifications, Ontario innovation ecosystem knowledge, and references – 20%
- Demonstrated record and quality of successfully delivered strategic plans – 20%
- Approach, methodology, stakeholder engagement, and ability to meet timelines – 25%
- Board facilitation experience and proposed approach to Board strategy sessions – 15%
- Cost effectiveness and clarity of pricing – 20%

OCI may request clarification, presentations, or interviews with shortlisted proponents.

Timeline

- RFP issue date: Thursday, October 8, 2026
- Proposal submission deadline: Tuesday, October 20, 2026 at 4:00 pm ET
- Expected selection and contracting: By October 30, 2026
- Facilitated OCI Board strategy session: Wednesday, November 25, 2026
- Second Board strategy session: January 2027
- Final Board presentation and approval: March 2027
- Target final strategic plan: March 31, 2027

OCI reserves the right to adjust this schedule. The November 25, 2026 initial Board strategy session is a fixed milestone; subsequent Board dates will be confirmed.

Contract Terms and Conditions

- OCI reserves the right to award all, part, or none of this solicitation and is not required to accept the lowest-cost proposal.
- Changes to scope, schedule, staffing, or cost require written OCI approval. Payment will be made against approved invoices and agreed milestones.
- Travel and related expenses require prior written approval.
- The selected consultant must protect OCI information, comply with applicable laws and OCI policies, and use approved storage and processing environments for non-public information.
- OCI will own OCI-specific deliverables and work products, subject to any pre-existing vendor intellectual property identified and agreed to in the contract.
- Proponents must disclose actual or perceived conflicts of interest.

Use of AI Tools

Any AI tools used in delivering the engagement must comply with OCI's applicable GenAI and data-handling policies. Non-public OCI information may not be transmitted to public, consumer, shared-training, or otherwise unapproved AI services without prior written consent. Proposed AI use must be disclosed and all deliverables remain subject to appropriate human review and quality assurance.

Submission Instructions & Contact Information

Proposals must be submitted by email by 4:00 pm ET on Tuesday, October 20, 2026 to:

Carmela Mendoza

Administrative Coordinator
Ontario Centre of Innovation
cmendoza@oc-innovation.ca

All bids will be acknowledged with a return receipt. Questions may be submitted by email to Carmela Mendoza. OCI may share responses with other potential bidders where appropriate.

Confidentiality

All information provided by or obtained from OCI in connection with this RFP, including intellectual property, strategic information, and other non-public information, must be treated as confidential and used only for preparing a proposal and, if selected, delivering the engagement.