



Request For Proposal (RFP) Strategic Planning Consulting Services

INTRODUCTION

The Community Action Program Belknap-Merrimack Counties, Inc. (CAPBM) is soliciting proposals for a contractor to navigate the strategic planning process and successfully plan, develop, implement, and evaluate a strategic plan for the Agency.

The Community Action Program Belknap-Merrimack Counties, Inc. (CAPBM) is a New Hampshire-based, I.R.S. approved 501© (3) private, nonprofit organization overseen by a voluntary Board of Directors. The Agency was established in 1965 under the provisions of the Equal Opportunity Act of 1964 and is a New Hampshire organization in good standing with the New Hampshire Secretary of State.

CAPBM continues to plan for the future, maintaining a balance between the needs of our diverse residents and a growing business community. The Agency administers federal, state, and local government-funded programs.

MISSION STATEMENT

The purpose the corporation includes providing assistance for the reduction of poverty, the revitalization of low-income communities, and the empowerment of low-income families and individuals to become fully self-sufficient through planning and coordinating the use of a broad range of federal, state, local, and other assistance (including private resources) related to the elimination of poverty; the organization of a range of services related to the needs of low-income families and individuals, so that these services may have a measurable and potentially major impact on the causes of poverty and may help families and individuals to achieve self-sufficiency; the maximum participation of residents of the low-income communities and members of the groups served to empower such residents and members to respond to the unique problems and needs within their communities; and to secure a more active role in the provision of services for private, religious, charitable, and neighborhood-based organizations, individual citizens, and business, labor and professional groups, who are able to influence the quantity and quality of opportunities and services for the poor.

A Brief Overview of Strategic Planning As Outlined In A Comprehensive Guide To Community Action Planning Published By Community Action Partnership

Strategic planning is a systematic, participatory process to manage long-term organizational change and growth. The process is proactive, not reactive – anticipating change while simultaneously stimulating it. The process is designed to assess an organization's capacities and environment, clarify its mission, build a shared vision of the future, determine its priorities, set common goals for the entire organization, create action plans, focus energy and resources, measure results and evaluate and adjust the organization's direction in response to evolving customer and community needs and a changing environment. In short, the process is about developing and implementing a

strategic plan and then tracking its progress and evaluating its results.

The strategic plan itself is a road map to achieving a shared vision of the organization and/or community in 3-5 years. Day-to-day, the plan's implementation guides an organization in fulfilling its mission, making decisions, and allocating resources. Over the long term, the strategic plan acts as a blueprint for implementing changes that incrementally realize the organization's vision. By planning for change, an organization can strategically chart its own growth and revitalization in a manner that improves its effectiveness, capacity, and relevance.

A strategic plan should always begin with a review of the data and conclusions drawn from the assessment of community needs and resources since it represents the agency's overall strategy for how to meet those needs by best utilizing available resources. In turn, the strategic plan should inform the CAP's description of how the agency will deliver programs and services.

REQUEST FOR PROPOSAL (RFP)

CAPBM seeks a vendor who has demonstrated experience in successfully developing consensus-based strategic plans, has strong facilitation skills, has proven experience with non-profit strategic planning, and a strong understanding of the structure and purpose of Community Action Programs.

We expect the project to include the following:

Project management:

- Design and execution of a strategic visioning and comprehensive planning process
- Develop an actionable strategic plan, including a projected budget for implementation. The actionable strategic plan will identify:
 - Shared vision
 - Goals & Objectives
 - Strategies and or activities
 - Responsible partners and their roles
 - Measures & Outcomes
- Develop recommendations regarding the plan's implementation and support structure

The proposal should include:

- Understanding of the work to be performed, estimated hours, and other pertinent information.
- Organization description, size and structure. Indicate whether the firm is a small or woman- or minority-owned business.
- Qualifications of all staff to be assigned to the project and specify the project manager.
- Resumes of staff to be assigned to the project. Education, position in firm, years and type of experience, continuing professional education, etc., will be 4 considered.

This plan should also include:

- Resource development strategies

- Initial communications strategies (What are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)

It is expected that these tasks will be accomplished through a combination of activities, including but not limited to:

- Environmental Scan and researching and analyzing current existing data such as current strategic plan, Community Assessment, CSBG Organizational Standards, other CAAs.
- Benchmarking our organizations with other similar sized non-profits or additional organizations with similar focus.
- Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner and community input.
- Facilitated group meetings with the board and staff to create consensus regarding a strategic vision and plan
- Develop a SWOT analysis

Methodology and Deliverables: Please explain the each of the following stages:

Stage 1: Preparation – Define Process parameters

Stage 2. Discovery - Vision and key goals with CAPBM Board - This stage includes consensus building among the CAPBM Board members to discover a shared strategic vision that is clearly stated, is compelling, is timely, describes a clear and present need, motivates people to act and is a worthwhile challenge.

Stage 3. Research and Validation - Needs assessment, gap analysis, SWOT analysis, research, etc. This stage should produce the substantive documentation and solutions needed for validation of discovered vision and key goals and inform the strategic planning process.

Stage 4. Identify strategic goals and write the strategic plan, including detailed budget After the discovery and research phases, stage 3 entails the identification of key strategic goals and the development of an actionable strategic plan that will serve as the overall blueprint for our work.

Stage 5 Development of implementation recommendations This stage includes the development of recommendations regarding the implementation phase of CAPBM's work. Included within this phase should be a detailed budget to implement the plan and methods of measuring successful implementation

INQUIRIES

Questions regarding this RFP are to be submitted to Jeanne Agri at jagri@capbm.org with "Strategic Plan" in the subject line and copy Michael Tabor at mtabor@capbm.org. Questions regarding this RFP will only be accepted via email. The deadline for questions is November 23, 2022 by 9:00am.

SUBMITTING PROPOSALS

Submit an electronic copy, to Jeanne Agri @jagri@bm-cap.org. All proposals must be received on or before 12:00 PM, November 28, 2022. Proposals received after the due date will be rejected. The proposal offer acknowledges the right of CAPBM to accept or reject any or all proposals and to waive any informality in any proposal received.

INFORMATION REQUIRED WITH PROPOSAL

Proposals must include:

- Introduction of Contractor summarizing company's background, resources and relevant experience.
- Examples of past projects, preferable of a similar size and scope.
- References from at least three (3) past projects, preferably matching those projects used as examples in B above.
- Proposed budget for the project. Budget should include a suggested work plan and a breakdown of fees for professional services, hours, and administrative services.
- Proposed schedule for the project, including project stages, milestones and payments.
- A list of personnel on the project team
- Identify the main point of contact – name, title, phone and email address must be included.

AWARD OF CONTRACT

Award of the contract resulting from this RFP will be based upon the most responsive contractor whose offer will be the most advantageous to CAPBM in terms of cost, functionality, experience, quality of past work, and other factors as specified elsewhere in this RFP. Proposals will be evaluated upon the contractor's responsiveness to the RFP and the total price quoted for all items covered by the RFP. The successful contractor may be asked to participate in negotiations and may be asked to revise their proposal based on their negotiations. In submitting a proposal, each contractor acknowledges that they have read and understand these requirements. Competitive proposals will be considered and will result in a Fixed Price Contract.

CAPBM RESERVES THE RIGHT TO:

- Consider proposals based on their relative merit, risk, and values to the organization;
- Negotiate with all service providers.
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential contractor, when it is in the Agency's best interest;
- Accept other than the lowest-priced offer.
- Proposals received shall be judged by CAPBM solely on the following selection criteria:
 - Contractor's understanding of CAPBM's mission and the scope of this project;
 - The proposed price of the entire project;
 - The expected timeline for completing the project;
 - The contractor's demonstrated experience in similar projects for both corporate audiences and nonprofit organizations.

REJECTION OF PROPOSALS

CAPBM reserves the right to accept or reject any and all proposals and waive any minor discrepancies or technicalities in the proposal or specifications required to complete this project or when deemed to be in the best interest of CAPBM.

CONFIDENTIALITY

All information presented in this RFP, including information subsequently disclosed by CAPBM during the proposal process, shall be considered confidential and should not be released to outside parties. This document represents a request for proposal only and in no way should be construed as a contract or letter of intent.

PROJECT DELIVERABLES

All recommendations identified during this engagement will be documented and reviewed with CAPBM management. All deliverables produced during the engagement are for the sole use of CAPBM management. All work papers, analyses, and final reports will remain the property of CAPBM.

COST OF PROPOSAL

The Respondent shall bear all costs associated with the proposal meeting(s), interview(s), preparation, and submission of the bid, and CAPBM shall in no case be responsible or liable for those costs, regardless of the conduct or outcome of the solicitation.