



REQUEST FOR PROPOSALS
For Conducting
A strategic plan
Garrett County Community Action Committee, Inc.
October 23, 2020

▪ **Overview and Purpose**

1. 5-7 year strategic plan

The Garrett County Community Action Committee (GCCAC) is soliciting written proposals from qualified consulting firms or individuals to lead and coordinate a process that will result in a comprehensive 5-7 year comprehensive organizational strategic plan. Proposals should clearly state how the consultant will work with GCCAC in a comprehensive and participatory process.

2. Augment Financial Management Plan

GCCAC will be conducting a review of its financial management operations in close proximity to the strategic planning process. There is a close relationship between the GCCAC strategic plan and its financial management capacity and practice. GCCAC is seeking ideas and recommendations on how best to coordinate the two processes including timelines and a blueprint for how the recommendations of each can support mutual implementation and practice. GCCAC will accept proposals for facilitating both the financial management and strategic planning process from the same consultant in either a separate or combined proposal. The financial management scope of work is described in a separate RFP. Whether done by the same firm or by separate entities, the two plans should specifically describe how they can best complement each other.

3 Guiding Principles

As a community action agency, GCCAC's mission and efforts are *community based* and *community driven*. It follows that any strategic planning process must, therefore, also be vested in the community. The plan becomes a dynamic, flexible roadmap that establishes outcomes, sets and prioritizes goals – complete with tasks and activities to accomplish outcomes. It assigns responsibility for carrying out goal-oriented activities, guides thinking and program decision making, and holds GCCAC accountable for actions within realistic timeframes.

- **Eligibility**

GCCAC seeks a consultant who demonstrates a strong understanding of needs and opportunities offered by organizations similar to GCCAC, has strong facilitation skills, is familiar with rural environments, and has demonstrated excellent communication and strategic planning in previous projects.

- **Description of GCCAC**

Established in 1965, GCCAC is a non-profit community benefit corporation organized under section 501 c 3 of the internal revenue code. It is a designated community action agency with a mission *to improve the quality of life for people in need by empowering them to become more self-sufficient and by providing essential services in collaboration and cooperation with partners.* Its primary service area is Garrett County Maryland located in rural Appalachia.

The corporation is governed by a Board of Directors comprised of 15 members who represent various sectors and constituencies within Garrett County. Over the past 50 plus years, GCCAC has emerged into a respected and capable community leader who has expanded the capacity to deliver needed services such as housing, community development, aging and nutrition, lifelong learning, family economic security and transportation. The agency is a respected voice and advocate on issues of policy on local, state, and federal levels as well as with the policy interests of private funders and foundations. More recently GCCAC has become an acknowledged leader of the 2-Generation Approach for disrupting generational poverty cycles and has developed a proprietary client tracking software platform marketed nationwide. The software captures fundamental client data, tracks client assessments, case notes, and related client outcomes. The agency offers a broad and deep array of over 40 programs and services to assist those in need. It has multiple sources of revenue that include federal, state and local governments, private foundations, earned income and private investments and donations. GCCAC is owner or part owner of several business enterprises and is general partner and in many case the limited partner in partnerships created to develop and operate affordable rental housing. Agency operating revenues were approximately \$18 million in 2019 and the consolidated gross income of \$26 million. GCCAC receives funding from the federal Community Services Block Grant which trigger standards on tracking and reporting outcome data and best practices unique to community action agencies.

GCCAC last completed a comprehensive strategic plan in 2007 with an update in 2013. Given the time lapse and the continued expansion of its involvement in responding to local needs, in participating in various policy circles and given emergent ideas in a shifting political landscape, it imperative that GCCAC re-evaluate its mission, vision and priorities in order to create a new strategic plan.

- **COVID issues**

GCCAC recognizes that COVID-19 has high potential to impact the logistics on how to approach strategic planning. Proposals must include options for conducting strategic planning activities within an environment that addresses COVID needs and practices. Specifically, the proposal

should include technology and options that will be offered for planning participants and stakeholders.

▪ **Scope of Services**

1. Preparation and Planning

The consultant will gather and review information to prepare for the planning sessions including past strategic plans, work plans, and outcome data. In consultation with the steering committee, the consultant will identify stakeholder groups and individuals who are essential to an assessment of GCCAC and the community. The consultant will describe a plan for engaging stakeholders so that they can participate meaningfully and will identify tools and methods for collecting data and documenting the process. The consultant will work with the steering committee to prepare and conduct a launch of the process.

2. Communication

The consultant will delineate a plan for soliciting input from staff and stakeholders to effectively, establish agendas, identify and prioritize issues, review findings, analyze data, make choices and review draft documents for the purpose of engaging participants and for decision making. The consultant will facilitate communication by documenting the process to include key discussions and decisions at each phase, and by sharing the documents with the different groups. The consultant will explain how the use of technology will be used for communication and engagement particularly in the era of COVID.

3. Creating the Plan

The consultant will help GCCAC identify strategic goals and create an actionable strategic plan. The plan will consist of an executive summary and a detailed and comprehensive description that identifies;

- a) Review of mission, vision and values
- b) Strengths, weakness, opportunities and threats
- c) Areas of growth, opportunity and improvement
- d) Long term organizational sustainability
- e) Identify 3-6 long and short term goals
- f) Strategies
- g) Strategic objectives
- h) Outcomes and metrics
- i) Initial action steps

The Consultant will demonstrate how the GCCAC operating departments, Human Resources, Asset Management, Information and Technology and Financial Management functions support and align with the strategic plan. In particular, the consultant will identify how employees' work plans will be tracked to support strategic objectives. The consultant will devise a plan for identifying, tracking and reporting outcomes that support the strategic plan goals and objectives.

4. Implementation

The consultant will describe how the following elements will be used and incorporated into the strategic planning process.

- a) Tools/work groups for effective monitoring and adjusting
- b) Data collection
- c) Coordinate with CSBG reporting
- d) Long range plan for ongoing updates and reviews.
- e) Final presentation

The consultant will produce a final report to be presented to the board of directors including separate summary document for external distribution. In addition to the elements described above in creating the plan, the report will include recommendations for how GCCAC can continuously monitor and adjust the strategic plan including data collection, timelines, and work groups. The consultant will also structure the plan to align with the CSBG organizational standards and the national CSBG reporting and outcome requirements. The final report will be in electronic and hard copy format.

- **GCCAC contribution and involvement**

GCCAC will provide support for the consultant. The proposal will identify any GCCAC staff support, staff assignments, documents required and desired, meeting space, technology needed and necessary introductions.

- **Format and Content**

Proposals will include the following information;

- a) Approach and methodology to strategic planning
- b) Summary of the strategic planning experience
- c) A recent list of organizations for which strategic planning has been completed.
List any Community Action Agencies.
- d) Examples of previously developed tools used for strategic planning
- e) Project time line with major tasks and milestones
- f) Project Budget (costs to GCCAC)
- g) Identification of individuals who will be involved in the process that includes role, and experience
- h) References with contact information

- **Proposal Requirements**

The proposal should provide the name of the consultant, title, address, phone number, email address of the company, and any team members assisting in the project. The proposal should also include the qualifications and experience of similar related work. The proposal should also include references with contact information.

- **Right to Reject**

GCCAC has the right to reject any and all proposals received in response to this RFP.

- **Submission Instructions**

Proposals must be submitted in PDF format via email to mbender@garrettcac.org before the closing submission date and time listed below. Late or incomplete submissions will not be accepted. Inquiries should be directed to Duane Yoder at dyode@garrettcac.org or 301 334-9431.

- **Fee**

The consultant will state the fee to be charged and a project draw schedule. If the consultant is also responding to the RFP for the financial management consulting contract, the statement should include both the price of the two combined contracts and one separate for the strategic planning agreement. The consultant will provide an estimate of any additional costs that might be incurred above the price quoted for the scope of work outlined in this RFP.

- **Closing Submission Date**

Proposals are due by 4:30 PM on December 15, 2020

- **Conflict of Interest**

The consultant will provide a statement of conflicts the firm, sub-consulting firms and/or key employees may have regarding the provision of services. The statement should not only include actual conflicts, but also any working relationships that may be perceived by disinterested parties as a conflict.

- **Patent Indemnity**

The Bidder shall hold GCCAC, its officers, agents, servants, and employees harmless from liabilities of any nature or kind on account of use of any copyrighted or non-copyrighted invention, or article of appliance furnished or used under this RFP

- **Minority, women and small business**

Efforts will be made by GCCAC to utilize small businesses, women and minority owned businesses with the consideration that the primary responsibility of GCCAC is to select the proposal deemed most favorable with regard to the achievement of the scope of work. A bidder qualifies as a small business firm if it meets the definition of *small business* as established by the Small Business Administration (13 CFR 121.3-8), by having average annual receipts for the past three fiscal years of less than four million dollars.

- **Authorization Statement**

A statement of authorization like the one shown below must be completed and provided and be incorporated into the respondent's proposal.

The undersigned hereby asserts that he/she is duly authorized to submit this proposal and to enter into a contract with Garrett County Community Action Committee, Inc.

Name of Firm/Consultant

Name of Principal/CEO/Owner

Signature

Title

Phone

Address

City/State/Zip

Date

License (if applicable)

E-mail
