



## **REQUEST FOR PROPOSALS**

## **STRATEGIC PLANNING SERVICES**

### **PURPOSE**

CAPSBC has initiated a Request for Proposals (RFP) process to identify a qualified consultant to guide and execute a strategic planning process with our CEO, Board of Directors, and staff to produce a five-year strategic plan.

CAPSBC seeks a consultant who demonstrates a strong understanding in nonprofit structure and operations, excellent facilitation skills, and proven experience with nonprofit strategic planning. In addition, consultants should be knowledgeable to matters related to the local and national nonprofit human services landscape, and government and private grant programs. Experience with community action agencies, community engagement and participant-centered practices is highly preferred.

### **ABOUT CAPSBC**

#### **About Community Action Partnership of San Bernardino County (CAPSBC):**

CAPSBC is a non-profit public benefit corporation with a 501(c)(3) status and is the designated Community Action Agency for San Bernardino County. CAPSBC has been serving San Bernardino County since 1965. CAPSBC is one of the 1,100 Community Action Agencies nationwide dedicated to assisting low-income individuals and families to become stable and self-reliant. CAPSBC's services benefits over 800,000 San Bernardino County residents annually through the following core programs.

- Family Development Program
- Energy, Education and Environmental Services
- Food Bank

For more information, visit [www.capsbc.org](http://www.capsbc.org)

### **SCOPE OF WORK & DELIVERABLES**

The project is expected to include the design and execution of a strategic planning process that meets the criteria outlined in this RFP, including project management, facilitation, budget for implementation, and support structure for plan implementation. The five-year strategic plan is targeted for 2022-2027.

CAPSBC envisions the scope of work to be completed in three stages. Work completed in each of the stages must be summarized in a report to the CEO and Board of Directors of CAPSBC. We expect that the work will be completed by **March 31, 2022**.

### **Stage 1: Preparation & Assessment**

This stage requires the consultant to research and assess in preparation for the strategic planning process. Items to be considered may include:

- Review organization's history and overall organizational assessment through Strength, Weaknesses, Opportunities, and Threats (SWOT) followed by a gap analysis to evaluate opportunities and/or challenges.
- Conduct an environmental scan benchmarking of the organization in alignment with other community development organizations with a similar focus, regionally and nationally.
- Conduct interviews, surveys and focus group polling to receive partner, stakeholder, and community input (should include but not be limited to current, past and potential funders).
- Assess the current and future direction of the field, specifically private foundation investment trends, emerging research, government programs and policy efforts.

### **Stage 2: Strategic Plan Creation**

At this stage, the consultant helps the nonprofit identify strategic goals and creates an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:
  - Shared Mission and Vision
  - Proposed priorities, innovative strategies, synergistic approaches, etc.
  - SMART (specific, measurable, achievable, realistic, and time-limited) Goals
  - Opportunities for staff, leadership, and the Board (e.g., staff retreats, Board retreat, leadership strategic planning meetings, etc.)
  - Objectives and tactics
  - Early action items to demonstrate progress, create momentum and buy-in
  - Listing of responsible parties and roles
  - Metrics and measurable outcomes
- Optional components of the plan could include:
  - Resource Development strategies
  - Recommendations for enhancement of current financial, technological, and human capital
  - Communication strategies

### **Stage 3: Implementation & Evaluation**

This stage requires the consultant to provide oversight of the implementation and evaluation process. This process should include:

- Follow-up sessions with nonprofit leadership to gauge the progress of the implementation at

- 3- and 6-month points after plan delivery.
- Continued identification of early action items
- Review of metrics to determine effectiveness of implementation

## **SUBMISSION INSTRUCTIONS**

### **SUBMISSION REQUIREMENTS**

- All submissions must be electronic
- General Information Narrative, Qualifications & References and Project Plan & Budget sections (see below)
- Attachments & Supporting Documents must be type written. Include additional attachments as needed.
- Faxed or mailed copies will NOT be accepted.
- Submissions will be kept on file.

### **CLOSING SUBMISSION DATE & INQUIRIES**

**Proposals are due by June 30, 2021**

All submissions must be sent to [RFP@capsbc.org](mailto:RFP@capsbc.org). Electronic submissions must not exceed 15 megabytes; a link to the file may be provided in lieu of an attachment. An email acknowledgement of each submission received will be sent to the applicant.

Questions on the RFP must be submitted to [RFP@capsbc.org](mailto:RFP@capsbc.org) by June 4, 2021 answers will be posted to our website, [www.capsbc.org](http://www.capsbc.org) by June 11, 2021.

Additional inquiries concerning this RFP should be directed to [RFP@capsbc.org](mailto:RFP@capsbc.org).

All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the Proposal Format (see below).

## **PROPOSAL FORMAT**

**Proposals must follow this format, in this order:**

### **1. General Information**

- Contact information:** Name of consultant/firm, address, phone number, email address and website.

### **2. Narrative, qualifications & References**

- Opening:** Your approach to strategic planning.
- Qualifications:** Relevant work activities, expertise, knowledge, and strategic planning experience. Experience should include specific examples of similar related nonprofit work. Please note any prior experience assisting foundations with their strategic priorities in the area of work related to CAPSBC. Some key qualifications that will be considered:
  - ❖ Education (degree(s) and/or certificate(s))
  - ❖ Experience in successfully developing strategic plans

- ❖ Knowledge of collective impact or collaborative strategic initiatives
- ❖ Strong facilitation skills
- ❖ Experience in creating a neutral environment for obtaining input
- ❖ Experience in gathering and utilizing data to drive the strategic process
- ❖ Ability to constructively challenge key stakeholders
- ❖ Experience in inspiring others to think innovatively
- ❖ Project management and change management experience
- ❖ Experience with community engagement and participant-centered practices
- ❖ Familiarity with the core programs at CAPSBC (preferred but not required)

c. **Your Team:** Information about all team members who will be involved with the project, including names, email addresses, title, tenure, experience, and education.

d. **References:** Three client references (please include each individual's name, address, phone number, email address and relationship to the bidder).

### 3. **Project Plan & Budget**

a. **Work Plan:** Detailed work plan, to include:

- ❖ Major stages and milestones
- ❖ Specific activities to be conducted at each stage
- ❖ Timeline for the activities to be conducted at each stage
- ❖ List of milestones and deliverables tied to the activities to be conducted at each stage

b. **Budget:** Detailed project budget (including estimated hours, and proposed payment schedule as it relates to project milestones and deliverables).

### 4. **Attachments & Supporting Documents**

a. **Work samples:** At least one sample of a previously completed strategic plan. Portions maybe redacted to protect private information as needed.

b. **Supporting documents:** Attachments may also be included.

## **EVALUATION NOTIFICATION & TIMELINE**

### **Scoring Criteria**

Proposals will be reviewed and evaluated based on the following criteria: qualifications, scope of work, work plan and budget.

### **Notification of Selection**

CAPSBC will seat the RFP Selection Committee. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled

with finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists.

The final recommendation of the RFP Selection Committee will be submitted for approval by the CAPSBC Board and is not subject to appeal. All applicants will receive written notification of CAPSBC's decision regarding their proposal, and an announcement of the applicant awarded the project will be posted on the CAPSBC's website, [www.capsbc.org](http://www.capsbc.org).

Additional information may be required from the selected applicant prior to the awarding of the project. CAPSBC reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need.

In the event no proposal is selected, CAPSBC may elect to either not develop the service pending further analysis of alternatives to meet the expressed need or issue a new RFP to attempt to expand the pool of potential respondents.

### **TIMELINE**

May 26, 2021	Release RFP
June 4, 2021	Deadline for questions
June 11, 2021	Answers to questions posted
<b>June 30, 2021</b>	<b>Deadline for receipt of proposals</b>
July 2021	Internal committee to evaluate and proposals select finalists
July 2021	Interviews with highest-ranking (if required)
July 2021	Notify the selected applicant; notification of project award posted on CAPSBC website; startup contract signed

### **TERMS & CONDITIONS**

#### **1. Ownership and Confidentiality**

All intellectual property will become the property of CAPSBC. All data remains the sole property of CAPSBC. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

## **2. Cost of Proposal**

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by CAPSBC.

## **3. Reservation of Rights**

CAPSBC reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. CAPSBC may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. CAPSBC reserves the right to withdraw this RFP and/or any item within the RFP at any time without prior notice. CAPSBC reserves the right to disqualify any proposal, which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of CAPSBC. It does not commit CAPSBC to award any contract.

## **4. Conflict of Interest**

Applicants agree that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and CAPSBC. Any perceived or potential conflict of interest must be disclosed in the proposal. The following individuals or entities are ineligible to be a CAPSBC vendor, and therefore may not submit a proposal:

- CAPSBC employees, Board members and their family members