



REQUEST FOR PROPOSALS FROM NONPROFIT STRATEGIC PLANNING CONSULTANTS

PURPOSE

Westside Regional Center has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute a strategic planning process with our stakeholder community to inform a three year strategic plan.

WHO IS ELIGIBLE TO RESPOND?

Westside Regional Center seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, have strong facilitation skills and have proven experience with nonprofit strategic planning. In addition, consultants should have knowledge of the Regional Center System along with state and federal funding requirements. An emphasis and experience in engagement with person-centered-practices is highly preferred.

ABOUT THE ORGANIZATION

It is Westside Regional Center's mission to empower people with developmental disabilities and their families to choose and access community services that facilitate a quality of life comparable to persons without disabilities. Westside Regional Center (WRC) is one of 21 private, non-profit centers in California, funded by the State Department of Developmental Services to provide or coordinate services for individuals with or at risk for developmental disabilities and their families.

SCOPE OF WORK & DELIVERABLES

We expect the project to include:

1. Project Management and Facilitation
2. Design & execution of a strategic planning process that meets the criteria outlined in this RFP
3. Development of a three-year strategic plan (2021-2023) that includes a budget for implementation
4. Development and execution of a support structure for plan implementation

The proposal should include:

1. A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project
2. Qualifications of all consulting staff who will be assisting with the project such as; education, position within consulting firm, years & type of experience.
3. Time and Cost projections

PROJECT GOALS AND TARGET AUDIENCE

Westside Regional Center envisions the scope of work to be completed in three stages. Work completed in each of the stages will be summarized in a report to the Board of Directors and stakeholder community.

1. Stage 1- Pre-planning

This stage requires the consultant to research and report the following in preparation for the strategic planning session. Items to be considered:

- Review of organization's history and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities or concern
- Benchmarking the nonprofit in alignment with the Association of Regional Center Agencies (ARCA) strategic plan along with strategic plans of other Regional Centers with a similar focus
- Interviews, surveys & focus group polling to receive partner & community input
- Development of a shared understanding of the current status of the Regional Center system along with current federal and state guidelines and funding requirements.

2. Stage 2- Strategic Planning Creation

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

- An executive summary
- A comprehensive plan that identifies:
 - Shared Mission and Vision
 - SMART (specific, measurable, achievable, realistic, and time-limited) Goals
 - Objectives
 - Strategies
 - Tactics
 - Listing of responsible parties & roles
 - Outcomes
 - Measurables
- Optional items to the plan would include
 - Resource Development strategies
 - Recommendations for enhancement of current financial, technological, and human capital.
 - Communication strategies

3. Stage 3- Implementation & Evaluation follow-up

This stage requires the consultant to assist the nonprofit by providing oversight of the implementation & 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
- Gathering of any measurables that would give indication of successful implementation

OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of the nonprofit organization receiving services. All data remains the sole property of the nonprofit organization. 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.

PROPOSAL FORMAT

Please include the following information in your proposal:

- Your approach to strategic planning
- A summary of your strategic planning experience
- Identify specific nonprofit sectors in which you have conducted strategic planning
- Three Client references
- Sample project timeline with major tasks and milestones
- Detailed project budget
- Sample project plan
- Identification of those on your team who will be involved with the project which should include their role and experience

The proposal must also include the following specific information:

General information- The proposal should provide the name of the consultant, title, address, phone number, email address, and website, if one exists. The name and email address for any team members assisting in the project should also be included.

Consultant Qualifications & Roles- The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related nonprofit work.

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 thinking innovatively
- Project management experience
- Knowledge of Regional Center System, State and Federal Funding Requirements, and Person-Centered Practices

Work Plan- The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work.

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones & deliverables tied to the activities
- Proposed payment schedule tied to project milestones & deliverables

References- Information regarding each reference should include the individual's name, address, phone number and email address.

Previous Work Product- The proposal should include at least 1 sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

SCORING

Proposals will be reviewed and evaluated on the following criteria:

1. Qualifications (35%)
2. Scope of Proposal (25%)
3. Work Plan (25%)
4. Budget (15%)

PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for submission

1. Closing Submission Date

Proposals are due by 4:00pm on Monday, June 1st, 2020

2. Inquiries

Inquiries concerning this RFP should be directed to **Kate Harvey – Executive Assistant 310-258-4201**
KateH@WestsideRC.org

3. Conditions 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 Westside Regional Center.

4. Submission Instructions

- All submissions must be submitted through email to KateH@WestsideRC.org.
- Narrative description of project proposal should not exceed 8 single sided pages.
- Attachments/Forms must be type written. Include additional pages as needed.
- FAX copies will NOT be accepted.
- Submissions will NOT be returned.

Electronic submissions cannot exceed 15 megabytes per email. Multiple emails per RFP submission can and will be accepted. An email acknowledgement of each submission received will be sent to the applicant.

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 submission instructions in the RFP.

5. Reservation of Rights

WRC 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. WRC 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. WRC reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. WRC reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of WRC. It does not commit WRC to award any grant.

6. Confidentiality

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

7. Ineligibility

Under the following conditions, an individual or entity is ineligible to be a regional center vendor, and therefore may not submit a proposal.

Conflict-of-Interest: Any individual or entity that has a conflict-of-interest as established in DDS Regulations, Title 17, Sections 54314 and 54500 et seq., unless a waiver is permitted and obtained, including:

- Regional Center employees and Board members, and their family members

8. Notification of Selection and Timeline

WRC 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 WRC Executive Director and is not subject to appeal. All applicants will receive written notification of WRC's decision regarding their proposal, and an announcement of the applicant awarded the project will be posted on the Center's web site, www.westsiderc.org

Additional information may be required from the selected applicant prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract. WRC 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 that no proposal is selected, WRC may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.

Contact Person

Completed RFP submissions including all elements listed above are **due to Westside Regional Center by 4:00 p.m. on Monday June 1, 2020.** Submissions be emailed to:

Attn: **Kate Harvey – Executive Assistant**
KateH@WestsideRC.org

Timeline:	April 13, 2020	RFP Release Date
➤	June 1, 2020 at 4pm	Deadline for receipt of proposals
➤	June 2 – June 10, 2020	Evaluation of proposals by Selection Committee
➤	June 11 – 12, 2020	Interviews with highest-ranking applicants, if applicable
➤	June 15, 2020	Notice of selection mailed to applicants
➤	June 15, 2020	Notification of project award posted on WRC web site
➤	June 19, 2020	Startup contract signed