

Request for Proposal Strategic Planning Process and Facilitation

The Board of Directors of The Arc Maryland is launching a strategic planning process for the organization that will define its direction for the next three years. The successful consultant will design a process to solicit input from the diverse range of stakeholders.

The process is expected to take six months, starting in late July 2018 and ending in December 2018.

Introduction

The Arc Maryland is the largest statewide non-profit, grassroots advocacy organization dedicated to the rights and quality of life of children and adults with intellectual and developmental disabilities. It is the mission of The Arc Maryland to work toward the creation of a world where children and adults with intellectual and developmental disabilities have and enjoy equal rights and opportunities.

The Arc Maryland is a membership organization governed by a voluntary board of directors. Members are parents, family members, persons with disabilities, professionals, and interested citizens. The Arc Maryland and its 10 affiliated local chapters engage in a wide range of activities, benefiting many citizens with intellectual and developmental disabilities residing in Maryland. The Arc Maryland is part of a national organization – The Arc United States – that supports advocacy activities organized at the local, state and national levels.

The Arc Maryland has many programs and priorities to encourage the full inclusion of children and adults in all aspects of life. We do this through education and advocacy, public policy work, and collaborations with local, state, and national partners.

Scope of Work

Key areas of work with approximate timelines are as follows:

- Conduct a strategic assessment of all key program areas, including a thorough review of existing materials and interviews with key stakeholders (staff, board members, partners, donors, program participants, volunteers, and beneficiaries)

- Create a summary of the strategic review for discussion by the Board of Directors that identifies and outlines key questions to be discussed at a facilitated retreat.
- Design and facilitate strategic planning meeting(s) for the board, staff, and key stakeholders to discuss the key questions, aiming for consensus results.
- In collaboration with staff and Executive Committee of the board, synthesize the discussions into a three-year strategic plan document for The Arc Maryland, for review and approval by the Board of Directors.

of note: the Scope of Work for this project does **not include a review or revalidation of the organization's mission, vision, and values. These guiding elements of the organization were previously (and recently) explored, reviewed, and reconfirmed by 100% board agreement and shall remain intact.*

Specific Objectives

The objective of this project is to assist The Arc Maryland in producing a comprehensive three-year strategic plan that will:

- Describe The Arc Maryland's current conditions and operating environment (assessment of current program offerings and business model, stakeholder feedback, analysis of competitors, trend assessment, organizational strengths and challenges);
- Clearly identify The Arc Maryland's desired impact for the next three years;
- Clearly outline organizational objectives in all key program areas that will help to achieve the desired impact;
- Define and outline indicators of success to track progress on the objectives;
- Articulate The Arc Maryland's strengths and how it can strategically apply them to achieve the objectives and desired impact;
- Identify strategic directions and partnerships, and tools that will assist in assessing future opportunities;
- Identify the organizational capacity (at both the Board and staff level) that is required to successfully implement the chosen strategies and objectives; and
- Identify strategic ways to generate the revenue needed to meet the new objectives and outcomes.

Information Session:

An information session will be held to review this Request for Funding Proposal and to ask questions. Attendance is not mandatory.

Conference Call information session: **Monday, June 25nd at 11:00 a.m.**

Please email or call Shannon McGovern to register for the call and to receive call-in information. smcgovern@thearcmd.org 410-571-9320.

Submission Details

If interested, please submit one electronic copy of a proposal in response to this RFP. The proposal should include the following information:

- Name and contact information and the names of any other participating consultants;
- Statement of qualifications to undertake this initiative;
- Summary of similar work conducted, highlighting specific accomplishments and also highlighting your experience evaluating, updating and revising strategic plans versus conducting the process from the ground-up;
- Your opinion on 5 critical factors that contribute to successful strategic planning;
- A narrative description of the proposed process, activities and approach, including one overnight facilitated retreat in the beginning of the second quarter of FY19;
- Timeline for the work;
- A detailed list of time/date commitment **conflicts**; these are any and all dates the respondent would be unavailable to conduct a Friday to Saturday overnight facilitation during the months of September through November;
- Timeline for the work;
- Fee & budget (identifying anticipated expenses in addition to fees);
- Three business references; and
- Copy of current resume(s).

Please submit proposals electronically no later than 3 p.m. on Monday, July 2, 2018 to:

Shannon McGovern at smcgovern@thearcmd.org

Important note: Receipt of all proposals will be acknowledged by email or phone on Monday, July 2. If you do not receive confirmation by 4 p.m. on July 2, please contact Shannon McGovern or Ande Kolp at 410-571-9320.

Process and Timelines:

RFP released: 6/14/18

Information Session: 6/25/18 at 11:00 a.m.

Proposals due: 7/2/18 by 3 p.m.

Top two to three proposals are selected for interview with Strategic Planning Committee by July 6 and respondents are invited to attend interview with Strategic Planning Committee meeting on July 17th at 10:30 or 11:30 a.m.

Vendor selected: 7/20/18

Commencement of work: 7/30/18

Final Product Due: 12/31/18

Procurement Terms and Conditions

Expertise. The successful bidder will have direct experience working with boards of directors and staff members of mid-sized, state-wide organizations to initiate and execute strategic planning. Additionally, the successful bidder also will have experience working with organizations engaged in advocacy, direct supports to families, fundraising, education and training, and community engagement. The successful bidder will contribute excellent analytical, interpersonal and verbal and written communications skills exercising knowledge of person-first disability language and etiquette. While experience working with nonprofit and disability-specific advocacy organizations is preferred, these experiences are not required for proposal submission.

Right to Reject/Cancel. The Arc Maryland reserves the right to reject any and all submissions received in response to this Request for Proposal, including proposals received from respondents who have previously failed to perform under the terms and conditions of a contract with The Arc Maryland including a failure to timely and/or to cost-effectively deliver similar services. The issuance of this Request for Proposal does not commit The Arc Maryland to award a Contract. The Arc Maryland reserves the right to cancel this procurement, to waive any defect or

technicality, and to advertise for new proposals, without notice or justification, where the rejection, cancellation, waiver or advertisement would be in the best interests of The Arc Maryland.

Formal Contract Required. Upon award, The Arc Maryland and the successful bidder will enter into a Contract based on the factors described in this Request for Proposal. The services to be provided will begin and end on specific dates to be negotiated by the parties. The Contract period shall not exceed five months, from date of Contract execution to submittal of final strategic plan, and the Contract value will not exceed the negotiated and ratified contract fee, unless the time period and/or the Contract value are modified by written, executed amendment to the Contract.

No Liability for Costs. The Arc Maryland shall not be liable for any costs associated with the development, preparation, transmittal, or presentation of any proposal or material submitted in response to this Request for Proposal. Each prospective bidder responding to this Request for Proposal agrees that it will have no claims against The Arc Maryland for any costs or liabilities incurred relating to this Request for Proposal.

Indemnification. The successful bidder will indemnify and hold harmless The Arc Maryland, its directors, officers, employees, agents and members from any and all liability resulting from the performance of the services provided under the Contract, including, but not limited to, the acts or omissions of the successful bidder, its directors, officers and employees, any and all sub-Contractor(s) and their employees, and/or from any and all third-party claims related to the Contract.

Applicable Law. This Request for Proposal and any Contract subsequently executed shall be governed and/or construed in accordance with the laws of the State of Maryland.