



**COMMUNITY FOUNDATION**  
*Ocala/Marion County*

**REQUEST FOR PROPOSALS FROM NONPROFIT STRATEGIC  
PLANNING CONSULTANTS**

**PURPOSE**

The Community Foundation for Ocala/Marion County has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute a strategic planning process for nonprofits seeking assistance through the Nonprofit Resource Center.

**WHO IS ELIGIBLE TO RESPOND?**

The Community Foundation for Ocala/Marion County 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.

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## **ABOUT THE ORGANIZATION**

The Community Foundation for Ocala/Marion County was established in 2011 by a group of community focused donors who saw the importance of a Foundation that would empower other local donors to strengthen the community through giving. The Community Foundation provides a variety of channels to actively connect donors with nonprofits fulfilling their missions.

The Community Foundation focuses on three distinct groups of stakeholders: Donors, Professional Advisors & Nonprofit Organizations. In 2018, the Community Foundation created a collaborative partnership with the City of Ocala, Marion County, the Marion County Hospital District and Advent Health to support capacity building for our local nonprofits. After months of research and discussion, the Nonprofit Resource Center was established.

The Center provides strategic planning support for nonprofits, grants services, nonprofit technical assistance, professional development, capacity building tools, community partnership services and more. With meeting space and some office space available to nonprofits, the Nonprofit Resource Center continues to be the go-to location for community nonprofits.

## **PROJECT OVERVIEW**

One of the newest programs available to local nonprofits is in the area of Strategic Planning. Research conducted in late 2018 and early 2019 clearly supported the need for our local nonprofits to gain a better understanding of the importance of not only creating a strategic plan but implementing and reviewing it on a regular basis.

Many of the nonprofits surveyed did not have a formalized plan but relied on loosely followed guidelines for execution of their mission. Of those that had a strategic plan, leaders admitted that the plan was either more than 5 years old or that no one had reviewed the plan since its inception. Local grantors were also noticing this gap in strategic planning while working with nonprofits who had applied for grant funding.

To address these issues, the Community Foundation's Nonprofit Resource Center is looking for strategic planning consultants who can help local nonprofits build solid strategic plans through a comprehensive participatory process. We hope to create a strong list of available consultants to be available on an "as needed" basis, when consultant expertise matches the needs of a particular nonprofit. Work will begin in the Fall of 2019 and will continue into 2020. We anticipate that multiple strategic planning projects may be ongoing at any time, each with its individual timeline.

## **SCOPE OF WORK & DELIVERABLES**

We expect the project to include:

1. Project Management
2. Design & execution of a strategic planning process that meets the criteria outlined in this RFP

3. Development of a three-year strategic plan 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**

The Community Foundation 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 Foundation.

### **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, interviews of current leadership team & staff and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities or concern
- Research the level of need for the nonprofit's services in the community and an analysis of any areas where services provided overlap with those provided by other organizations
- Benchmarking the nonprofit with other similar sized nonprofits with a similar focus
- Interviews, surveys & focus group polling to receive partner & community input

### **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
  - 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

**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 5:00pm on **Tuesday, October 1<sup>st</sup>, 2019**

### **2. Inquiries**

Inquiries concerning this RFP should be directed to Lauren Deiorio at [Lauren@ocalafoundation.org](mailto:Lauren@ocalafoundation.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 the Community Foundation for Ocala/Marion County.

#### **4. Submission Instructions**

Proposals should be submitted in PDF format via email to [Lauren@ocalafoundation.org](mailto:Lauren@ocalafoundation.org) before the closing submission date.

Late or incomplete submissions will not be accepted. It is the responsibility of the bidder to ensure that the response is received by the Community Foundation by the closing date and time. A response may be judged and excluded from further consideration if it is not received by the deadline or does not follow the format outlined above.

#### **5. Right to Reject**

The Community Foundation has the right to reject any and all responses received in response to this RFP.

#### **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. Notification of Selection and Timeline**

It is expected that a bidder will be selected within 2 to 3 weeks of the closing submission date, although this timeline is subject to change. The Community Foundation reserves the right to cancel the RFP at any time.

Please note that due to the nature of the project, there may be a gap between a consultant being selected for the project and being assigned to a nonprofit client, as consultants will be matched to nonprofits based on their specific circumstances and expertise.

RFP Released: September 11, 2019

Proposals Due: October 1, 2019

Selections Made: October 15, 2019

Project Begins: Various start dates ongoing through 2020

#### **8. Criteria for Selection**

The Community Foundation will select the proposal based upon which one it feels will deliver the highest quality deliverable at the best value. Proposals will be initially reviewed by a selection committee designated by the Executive Director.

Recommendation will be made by the committee to the Foundation's executive board for final approval.

Pricing will be a significant consideration but not the only criteria in evaluating the proposal. The proposal will be awarded to the qualified bidders whose proposals are

most advantageous to the Community Foundation with price and other factors considered.

**9. Conflict of Interest**

The bidder must disclose any possible conflicts of interest that may result from the award of this contract or services provided under this contract. Except as otherwise disclosed in the proposal, the bidder affirms that to the best of their knowledge there is no actual or potential conflict between the bidder, a bidder's team member working on the project or its family's business or financial interests and the services provided under this contract. In the event there is a change in either interest or the services provided under the contract, the bidder will inform the Community Foundation regarding the possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to the Community Foundation's satisfaction or the bidder may be disqualified from consideration of this RFP.