



Center for Human Development

Changing Lives, Transforming Communities

REQUEST FOR PROPOSAL: STRATEGIC PLANNING CONSULTANTS

PURPOSE

Center for Human Development has initiated a Request for Proposal (RFP) process to identify qualified consultants to help guide and execute a strategic planning process that will serve as the basis for the organization's three-year strategic plan to achieve the following major goals:

- Refine the language we use to describe who we are and what we do (mission, vision);
- Solidify the way we operate (culture, values), the way we do our work (guiding principles, frameworks), and how we are organized (operational excellence, organizational structure);
- Create a shared internal understanding of who we are, where we are going (strategic goals, growth opportunities); and
- Establish performance indicators and anticipated outcomes that reinforce our accountability to each other, the communities we serve, our stakeholders, and funders (performance and success metrics/indicators, outcomes).

WHO IS ELIGIBLE TO RESPOND?

Center for Human Development seeks consultants who demonstrate a strong overall understanding of nonprofit structures with mission-driven activities, have strong facilitation skills, and have proven experience with nonprofit strategic planning. In addition, consultants should have knowledge of public health, health care, prevention strategies, and the nonprofit landscape with a broad reach and programmatic scope. We are looking for a consulting service that is client-centered and can create an engaging experience for all participants in the strategic planning process.

ABOUT THE ORGANIZATION

Center for Human Development (CHD) is a community-based organization that offers a spectrum of services for at-risk youth, individuals, families, and communities in Contra Costa County since 1972. We provide wellness programs, systems navigation, and support services aimed at empowering people and promoting positive growth. Our dedicated staff and volunteers create and deliver programs and services addressing wellness and prevention, youth leadership, conflict resolution, parenting skills, reducing health disparities, and other challenges faced by the community. We deliver quality programs in schools, health clinics, the courts, and community sites throughout Contra Costa County.

CHD is an equal-opportunity employer with a dedicated and diverse workforce committed to directly impacting racial and health equity in the communities we serve. We have over 30 employees to serve the Contra Costa County area. Our staff supports a broad range of public health and prevention-related programs in the areas of policy and advocacy, health and racial equity, community assessment, capacity building and mobilization, patient-centered advocacy and health systems navigation. CHD's current (FY23-24) annual operating budget is roughly two million dollars. Our partners represent a broad range of stakeholders including government, academia, healthcare systems and providers, mental health and social services, community-based organizations, policymakers, business leaders, and community advocates. We work together to build community, capacity, and resilience to address social, economic, and racial factors that impact access to services and health outcomes.

SCOPE OF WORK & DELIVERABLES

We expect the project to include:

1. Project management and facilitation¹.
2. Design and execution of a strategic planning process that meets the criteria outlined in this RFP (including gathering secondary data to inform an environmental scan, multiple listening sessions, a one-day board retreat, and establishing a mechanism to report back on the progress made);
3. Development of a three-year strategic plan (2025- 2028) that includes a summary; and
4. Development of a dashboard to monitor and evaluate the strategic plan's implementation.

The proposal should include:

1. A project plan that demonstrates a clear 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, positions held, years and type of experience.
3. Time and cost projections.

PROJECT GOALS AND TARGET AUDIENCE

The strategic planning process is expected to begin in late February 2024 and go through December 2024, with an opportunity for extension or expansion of scope.

CHD has established the core areas that the Strategic Planning process will focus on:

- **Revitalize Purpose and Direction** (Mission, Vision)
- **Guiding Principles and Value Statement** (Equity, Excellence, Cohesiveness, Frameworks and Theory of Change, Guiding Principles for Decision Making)
- **Administrative and Operational Excellence** (Organizational Structure and Alignment, Relationships and Reporting Structure)
- **Making an Impact** (Metrics and Success Measures)
- **Revenue Growth** (Nonprofit Landscape Analysis; Sustainable Fund Development/Fundraising; Diversification, Stretch Goals)

CHD 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 the organization's history, current state in terms of programmatic and funding areas, organizational structure, and core background and defining documents.
- Benchmarking CHD with other community-based nonprofits, health, and capacity-building related organizations/consulting groups, and local, state, and national organizations/entities with similar missions and priorities.
- Conduct interviews, listening sessions, surveys and focus group polling to receive stakeholder, partner & community input.
- Develop a SWOT analysis of the organization to evaluate opportunities, gaps, and concerns.

¹ The organization is familiar with a collaborative consensus building and group process model called "Tribes."

2. Stage 2: Strategic Planning Creation

At this stage, the consultant helps CHD's Executive team to identify strategic goals and create an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive 3-year Strategic Plan that includes areas such as:
 - Shared Mission and Vision
 - Guiding Principles and Values
 - Goals
 - Strategies and Investments
 - Outcomes
 - Performance Measures
- Recommendations for enhancing current financial, technological, administrative, human resources, and organization alignment.
- A Budget Plan that represents resource allocations needed to achieve identified goals.

3. Stage 3: Implementation & Evaluation Follow-Up

This stage requires the consultant to assist CHD by providing oversight of the implementation & evaluation process. This process should include:

- Develop a monitoring and evaluation plan (dashboard) for strategic planning implementation.
- Follow-up session(s) with CHD leadership to gauge the progress of the implementation at three (3) months point after plan delivery.
- Support the gathering of any measures that would indicate successful implementation.

OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of CHD receiving services. All data remains the sole property of CHD. 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
- 1-2 success stories (including measures) that demonstrate your client's revenue growth and operational excellence as a result of engaging with your organization
- 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 as applicable. The name and email address of 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 the review and redesign of organizational structures
- Experience gathering input from diverse stakeholders (board members, staff, partners, and other key stakeholders)
- 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 experience
- Understanding of organizational development approaches for Diversity, Equity, and Inclusion
- Budget planning experience
- Knowledge of statewide nonprofits, public health, state, and federal funding.

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 stakeholder engagement strategies
- Sample timeline for the activity at each stage
- Specific approach for making this an equitable process
- 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.

Budget - Anticipated contract is valued at \$28,000, the overall budget is \$40,000.

SCORING

Proposals will be reviewed and evaluated on the following criteria:

- Qualifications (35%)
- Scope of Proposal (25%)
- Work Plan (25%)
- Budget (15%)

PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for Submission

1. Closing Submission Date Proposals are due by 4:00 pm Pacific Time on Thursday, January 18, 2024.

2. Inquiries concerning this RFP should be directed to Kevin Martin at kevinm@chd-prevention.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 CHD.

4. Submission Instructions:

- All submissions must be electronically sent to: kevinm@chd-prevention.org.
- Electronic submissions cannot exceed 25 megabytes per email. An email acknowledgment of each submission received will be sent to the applicant.
- The narrative description of the project proposal should not exceed 8 pages. Submissions will NOT be returned.

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

CHD 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. CHD 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. CHD reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. CHD reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of CHD. It does not commit CHD 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 CHD vendor, and therefore may not submit a proposal.

- CHD employees and Board members, and their family members

8. Notification of Selection and Timeline

CHD 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 the 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 CHD'S Executive Director and is not subject to appeal. All applicants will receive written notification of CHD's decision regarding their proposal.

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 shall disqualify the applicant from award of the project and/or contract. CHD 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.

If no proposal is selected, CHD 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.

TIMELINE

January 5, 2024: RFP release date

January 24, 2024, 4 pm PST: Deadline for receipt of proposals

January 25, 2024: Review committee convenes

January 29, 2024: Interviews with highest-ranking applicants, if applicable

January 30, 2024: Notice of selection to applicants

February 1, 2024: Potential contract start date

March 1 - May 1, 2024: Key Stakeholder Surveying and Listening Sessions

May 18, 2024: Strategic Planning Retreat

June 1 - August 16, 2024: Analyze and Report results

September 15, 2024: Draft Strategic Plan

October 19, 2024: All Staff listening session

November 22, 2024: Present Strategic Plan for CHD Board of Director approval

January 14, 2025: Publish Final Strategic Plan and Annual Report