

## Request for Proposal for Strategic Planning Process and Facilitation

The Arc Montgomery County is launching a strategic planning process that will define our direction for the next three years. The successful consultant will design a process to solicit input from our diverse range of stakeholders.

The process is expected to take six months, starting in September 2021 and ending in March 2022.

### Introduction

The mission of The Arc Montgomery County is to connect people of all ages and abilities with their communities to build inclusive and fulfilling lives.

The Arc Montgomery County provides support to children, youth, adults and senior citizens with and without disabilities throughout Montgomery County. The Arc Montgomery County provides the following support services.

- Inclusive childcare for children ages 6 weeks through 10 years
- Afterschool and summer program for youth with disabilities ages 11-21 years
- Personal supports for adults with disabilities that are provided in the person's/family home and/or in the community
- Employment and meaningful day programs for adults with disabilities
- Community living services for adults with disabilities provided in homes owned or leased by the organization
- Respite coordination for caregivers of children/adults with disabilities and frail seniors

The Arc Montgomery County is a membership organization governed by a volunteer board of directors. Members are parents, family members, people with disabilities, professionals, and interested citizens from the community. Employees are granted complimentary memberships. The Arc Montgomery County is part of a national organization, The Arc of the United States, that supports advocacy activities organized at the local, state and national levels. In addition to direct services, The Arc Montgomery County engages in advocacy and public policy work through collaboration with local, state, and national partners.

The Arc's most recent strategic plan was completed in 2018 and was designed to end in 2020. Progress on the plan and development of a new strategic plan was delayed due to changes in leadership during that time, as well as the pandemic. While some elements of the current plan may be retained in the new plan, the objective is to develop a plan which reflects the status of the organization today and where we want to be three years from now.

### Scope of Work

Key areas of work with approximate timelines are as follows.

- Conduct a strategic assessment of all key areas, including a thorough review of existing materials and interviews with key stakeholders (employees, board members, partners, donors, people supported, families, volunteers, and funders)
- Create a summary of the strategic assessment for discussion by the Strategic Planning Committee
- Design and facilitate strategic planning meeting(s) for the Committee to discuss key questions, aiming for consensus results
- In collaboration with the Committee, synthesize the discussions into a three-year strategic plan document for review and approval by the Board of Directors

## Specific Objectives

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

- Describe The Arc's current conditions and operating environment (assessment of current offerings and business model, stakeholder feedback, analysis of competitors, trend assessment, organizational strengths and challenges)
- Clearly identify The Arc's desired impact for the next three years
- Clearly outline organizational objectives that will help to achieve the desired impact
- Define and outline indicators of success to track progress the objectives
- Articulate The Arc's strengths and how it can strategically apply them to achieve 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 employee level) that is required to successfully implement the chosen strategies and objectives
- Determine revenue needed to meet the new objectives and outcomes

## Information Session

An information session will be held on **Wednesday, July 21, 2021 at 2:00 pm, via Zoom** to review this Request for Proposal and to ask questions. Attendance is not mandatory. Please email Loida Prophet to register and to receive the link. [LoidaP@arcmontmd.org](mailto:LoidaP@arcmontmd.org)

## Submission Details

Proposals must be submitted electronically, **no later than 5:00 pm on Monday, August 9, 2021** to Daria Cervantes at [DariaC@arcmontmd.org](mailto:DariaC@arcmontmd.org). Proposals 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
- Your opinion on critical factors that contribute to successful strategic planning
- A narrative description of the proposed process, activities and approach
- Timeline for the work
- Fee structure
- Three business references
- Copy of current resume(s)

Receipt of proposals will be confirmed by email no later than Tuesday, August 10. If you do not receive confirmation by 4 p.m. on August 10, please contact Daria Cervantes at 301.984.5777 x1225.

## Process and Timelines

- RFP released: 7.13.21
- Information Session: 7.21.21 at 2:00 pm
- Proposals due: 8.9.21 by 5:00 pm
- Finalists will be interviewed by The Arc's CEO and Director of Strategic Initiatives the week of 8.16.21.
- Vendor selection: no later than 8.27.21

## ***Procurement Terms and Conditions***

***Expertise:*** The successful bidder will have direct experience working with boards of directors, employees, and members to initiate and execute strategic planning. The successful bidder will contribute excellent analytical, interpersonal and verbal and written communications skills exercising knowledge of person-first disability language and etiquette.

***Right to Reject/Cancel:*** The Arc Montgomery County 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 Montgomery County 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 Montgomery County to award a Contract. The Arc Montgomery County 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 organization.

***Formal Contract Required:*** Upon award, The Arc Montgomery County 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 6 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.

***Confidentiality:*** All aspects of the strategic planning process are confidential and should not be shared with other organizations, clients or other entity without the approval of The Arc Montgomery County. This includes but is not limited to proprietary information, trade secrets, HIPAA-protected information and any other information obtained through work on this project.

***No Liability for Costs:*** The Arc Montgomery County 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 Montgomery County for any costs or liabilities incurred relating to this Request for Proposal.

***Indemnification:*** The successful bidder will indemnify and hold harmless The Arc Montgomery County, 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.