Request for proposal

Compliments of Wipfli LLP

Updated June 2021

(Entity name)

Request for proposal for conducting strategic planning services

Inquiries and proposals should be directed to:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please consider sending your completed request for proposal (RFP) to Wipfli.

Direct the RFP to Brian Gaumont via email at [*gfpbd@wipfli.com*](mailto:gfpbd@wipfli.com) or via mail to:

Brian Gaumont

Wipfli LLP

2501 West Beltline Hwy., Suite 401

Madison, WI 53713

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General information

A. Purpose

This request for proposal (RFP) is to seeking proposals from qualified consultants (“XXXXX”) for the purpose of obtaining information and firm pricing to conduct a far-reaching and inclusive process to inform and collaboratively create *(entity name)* strategic plan.

The plan will guide *(entity name)*’s operations and decision making from January 1, 202X through December 31, 202X. It will define *(entity name)*’s role in the community, guide the organization’s governance and advocacy for *(entity name)*, and establish a framework for setting strategic priorities and operational goals while creating measurable and achievable service plans and timelines. The purpose of the strategic plan is to position *(entity name)* to proactively provide service that meets the changing needs in a cost-effective manner and to educate stakeholders about *(entity name)*’s mission, vision, values and program.

B. Who may respond

Only qualified individuals with experience working with grant-funded programs may respond to this RFP.

C. Instructions on proposal submission

1. Closing submission date: Proposals must be submitted no later than 4:30 p.m. *(time zone)* on *(date).*
2. Inquiries: Inquiries concerning this RFP should be directed to (*name and telephone)*. Proposers may direct questions via email, or a phone or in-person meeting.
3. Conditions of proposal: All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the proposer and will not be reimbursed by *(entity name).*
4. Instructions to prospective contractors:

Your proposal should be addressed as follows:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

It is important that the proposer’s proposal be submitted in a sealed envelope clearly marked in the lower left-hand corner with the following information:

1. Electronic copy submissions: Proposals can be submitted electronically to the following email address: *(entity email address)* by the closing submission date noted above. It is the responsibility of the proposer to ensure that the proposal is received by *(entity name)* by the date and time specified above. Late proposals will not be considered.
2. Right to reject: *(Entity name)* reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based on the factors described in this RFP.
3. Presentations: At the discretion of *(entity name)*, proposers submitting proposals may be requested to make virtual presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected proposers. Not all proposers submitting a proposal will be asked to participate in oral presentations.
4. Notification of award:
   1. It is expected that a decision about selection of the successful proposer will be made within *(#)* weeks of the closing date for the receipt of proposals.

D. Description of entity and scope of work requested

*(Entity name)* is a nonprofit organization that serves *(#)* counties in *(state(s))*. *(Entity name)* is a private, nonprofit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. It is governed by a *(#)-*member volunteer board of directors. Administrative offices and all records are located at *(address).* Other offices are located throughout the *(geographic)* area.

Specification schedule

A. Pricing

The proposer’s proposed price for services should include a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated, including travel expenses.

B. Payment

Payment terms will be agreed upon with the proposer.

C. Confidentiality

The proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to *(entity name)*, the proposer agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the Proposer’s possession, to those employees on the Proposer’s staff who must have the information on a "need to know" basis.

The Proposer agrees to immediately notify, in writing, *(entity name)*’s authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

Technical qualifications

The proposer, in its proposal, shall, as a minimum, include the following:

A. Understanding our needs

The proposer should describe the current challenges and opportunities specific to our organization. Describe how your firm is best suited to assist our organization in facing those challenges and opportunities moving forward.

B. Understanding the scope of work

The proposer should clearly describe the scope of work to be performed in alignment with this RFP. The successful proposer in this RFP process will accomplish the following, in addition to other inclusions identified throughout the RFP. These include:

* Develop a comprehensive timeline. This project should be completed no later than ABC, XX, 202X.
* Facilitate a strategic planning process using a methodology acceptable for similar organizations to *(entity name)*.
* Perform an analysis of the political, economic and social factors affecting *(entity’s name)*.
* Engage internal and external stakeholders to gather critical input for the strategic planning process.
* Prepare the board, leadership, key staff and others to engage in strategic decision making around goals.
* Develop strategic priorities (three+ year goals), strategies (one-year goals), KPIs, 90-day accomplishments, and action plans that align with our mission, vision and values.
* Reflect the needs, voices and interests of a changing and diverse community.
* Include a process for the *(entity’s name)* to annually review and evaluate goals and develop new strategies based on the evaluation.
* Establish a method for evaluating progress and reporting on outcomes.

Optional scope options:

* Complete a community needs assessment that identifies the critical needs and disparities in the communities we serve.
* Comply with the requirements of the Community Services Block Grant (CSBG) Organizational Standards, ROMA, OMB’s Uniform Guidance and/or the Head Start Act.
* Asses the overall risk within our programs, activities and departments.

C. Understanding our industry

The proposer should describe its understanding of our industry by providing specific industry knowledge and expertise.

1. Prior experience working with similar organizations on similar projects.
2. Prior experience providing additional services to organizations similar to *(entity name)*.

D. Engagement team

The proposer should briefly describe the qualifications of staff to be assigned to the engagement. Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members.

E. Organization, size and structure

The proposer should describe its organization, size (in relation to work to be performed) and structure. Description should include:

1. Size of the proposer, including number of employees.
2. Industry specialization.

F. Approach to the engagement

The proposer should describe its approach to the work to be performed.

Proposal evaluation

A. Submission of proposals

Proposals should be submitted to *(contact name)* electronically or hardcopy by the date provided.

B. Nonresponsive proposals

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received in a timely manner in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers that the proposed undertaking would comply with requested work.

C. Proposal evaluation

Evaluation of each proposal will be scored on the following six factors:

* Understanding our needs
* Understanding our industry
* Organization size and structure of proposer’s firm
* Qualifications of proposer’s project team
* Proposer’s approach to the engagement
* Price

See appendix for additional information.

D. Review process

*(Entity’s name)* intends to select the proposal that is most advantageous to itself. The responses to this RFP will be evaluated by the strategic planning RFP committee established for this purpose.

The *(entity name)* may, at its discretion, request presentations by or meetings with any, all or none of the proposers to clarify or negotiate modifications to the proposers’ proposals.

However, *(entity name)* reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the proposer can propose.

*(Entity name)* contemplates award of the contract to the responsible proposer with the highest total points.

1. RFP schedule

|  |  |
| --- | --- |
|  | RFP issued |
|  | Deadline for questions submissions |
|  | Deadline for receipt of proposals |
|  | Initial review of received proposals |
|  | Evaluation of proposals begins |
|  | Final decision is made |

Appendix

A. Sample proposal evaluation

|  |
| --- |
| Using the attached form, C-suite staff and board members who are part of the proposal evaluation process should score proposals individually. Evaluation of each proposal will be scored on the below six factors. |

Total points will be calculated from each reviewer, providing a total point value for each responding proposer. The proposer, meeting all of the outlined criteria, that also accumulates the highest total point value may be awarded the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| Proposal evaluation | |  |  |
|  | | Point range | Points earned |
| Understanding our needs | | **0-5** |  |
|  | Understanding our current challenges and opportunities |  |  |
|  | Firm’s approach to addressing our challenges |  |  |
|  | |  |  |
| Understanding our industry | | **0-20** |  |
|  | Prior experience working similar organizations on similar projects |  |  |
|  | Prior experience providing additional services to organizations similar to *(entity name)* |  |  |
|  | |  |  |
| Organization, size and structure of proposer's firm | | **0-5** |  |
|  | Adequate size of the firm |  |  |
|  | Industry specialization |  |  |
|  | |  |  |
| Qualifications of staff to be assigned to the project | | **0-20** |  |
|  | Consulting team makeup |  |  |
|  | Prior experience of the individual consulting team members |  |  |
|  | |  |  |
| Proposer’s approach to the engagement | | **0-30** |  |
|  | Comprehensive methodology  Engages a variety of stakeholder groups  Collaborates with key leadership to achieve the desired outcomes  Delivers clear outcomes |  |  |
|  | Realistic timetable |  |  |
|  | |  |  |
| Price |  | **0-20** |  |
|  | |  |  |
| Total points | | ***0-100*** |  |

THANK YOU for your RFP!

Do you know Wipfli offers more than just this requested service? Wipfli provides products and services specifically for nonprofit organizations. Our specialists are ready to help your organization with:

Audit and tax

Keep your budget and finances balanced

Outsourced services

Finance and technology experience by your side, but not on your payroll

Online subscription services

Stay up to date on important compliance changes and get access to our specialists

Consulting

Consulting in HR, IT, leadership and operations

Tools to keep you compliant

Policy and procedure manuals you can customize for your organization

Training

More than 120 topics available through onsite, webinar and on-demand training

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