



# **Request for Proposal**

## **Strategic Planning Consultant**

Proposals accepted through:

**February 28, 2022**

**5:00 PM CST**

# Request for Proposal

## I. General Information

|                                |   |
|--------------------------------|---|
| Project Objective:             | To develop a 3-year Strategic Plan (2022-2025)  |
| Issuing Organization:          | St. Louis Office for Developmental Disability Resources<br>2121 Hampton Ave.<br>St. Louis, MO 63139 |
| RFP Issued:                    | January 18, 2022  |
| Questions must be received by: | February 7, 2022  |
| Responses to questions:        | February 14, 2022   |
| Due date for proposals:        | February 28, 2022   |

## II. Background

Senate Bill 40, which was passed by Missouri legislature in 1969 and is also known as the County Sheltered Workshop and Developmental Disability Services Law, RSMo. 205.968-205.972 allows local taxing districts to ask voters to approve a special real estate tax to provide services to persons who have developmental disabilities. St. Louis City voters approved this tax in 1980, establishing the St. Louis Office for Developmental Disability Resources (DD Resources).

DD Resources oversees the distribution of funds to local agencies that provide services to people with developmental disabilities that reside in the City of St. Louis. DD Resources is limited by state statute in its scope of funding possibilities. DD Resources is a nonprofit organization, but also a political subdivision so is a quasi-governmental entity. DD Resources also provides service coordination to St. Louis City residents with developmental disabilities through a Medicaid reimbursed contract with the State of Missouri Department of Mental Health.

DD Resources has a nine-member board appointed by the Mayor of St. Louis, and a 32 person staff. DD Resources has an annual budget of \$9.9M. Over \$6M of the annual budget is from personal property taxes.

## III. Scope of Work

DD Resources' current 3-year strategic plan launched in 2019. The agency needs an updated plan that will guide ongoing organizational, programmatic, and operational strategic initiatives to ensure sustainability for the organization. It is vital to the successful development and execution of the strategic plan to have Board, leadership, and staff involvement, along with stakeholder input.

The plan should create focus to achieve results, foster strategic thinking, and provide flexibility to respond to emerging issues and accommodate trends in the intellectual/developmental disability field. Areas to be addressed in the Strategic Plan include:

- Evaluate funding practices and service priority areas (priority areas: independent

living, employment, and community connection).

- Evaluate trends and opportunities within our Targeted Case Management Program, providing overall goals and direction for the program.
- Develop a process for DD Resources to review the strategic plan annually and update as needed in response to trends and events.

Provide a detailed description of the proposed strategic planning process with timelines and responsibilities of consultant, Board, and staff.

If the consultant is a content expert in intellectual/developmental disabilities (preferred):

- Identify additional areas of opportunity for collaboration and growth that are consistent with the agency's identity
- Identify trends in intellectual/developmental disability services that will affect DD Resources, both positively and negatively

The consultant will work with the full Board (7-9 members) and/or a board committee, leadership staff, and other selected staff or stakeholders.

#### **IV. Deliverables**

The finalized strategic plan document is to include, at minimum:

- 3-year Organizational Strategic Plan including strategic priorities, objectives, and action items
- A picture of the future that outlines DD Resource's long-term strategic direction

#### **V. Timetable**

|                   |                                |
|-------------------|--------------------------------|
| February 7, 2022  | Questions from consultants due |
| February 14, 2022 | Responses to questions sent    |
| February 28, 2022 | Proposal due                   |
| March 17, 2022    | Reach award decision           |
| April 2022        | Planning activities            |
| April - July 2022 | Execution of activities        |
| August 2022       | Plan completed                 |
| September 2022    | Board approval of plan         |

#### **VI. Selection Process**

The Board of Directors and Executive Director will review all proposals. In evaluating proposals, price will not be the sole factor. We may consider any factors deemed necessary and proper, including but not limited to: price, quality of service, response to this request, experience, staffing, and general reputation. The final decision rests with DD Resource's Board.

#### **VII. Information Required of Respondents**

In responding to this RFP please use the following format.

### **Section 1. Summary of the Proposal**

Provide a brief overview summary of the proposal.

### **Section 2. General Description of the Planning Activities Recommended**

Provide a brief statement of your understanding of the requested effort to develop DD Resource's strategic plan.

### **Section 3. Work Plan**

Provide information about proposed activities that would involve key stakeholders such as DD Resources, Board, staff, community members, and consumers. Also, provide a timetable for completing the process within the timeframe in Part V of this proposal. Specify what activities would be completed by DD Resources staff, Board, and leadership and what activities would be completed by the consultant.

### **Section 4. Staffing Plan, Including Resumes**

Identify each person who will work on the project and identify his or her role. Also, provide a resume and references for each member of your team.

### **Section 5. Bid**

Provide a "not to exceed" bid for the described services and, if applicable, projected expenses by line item.

### **Section 6. References**

Please supply the names and current contact information of three references for which you have worked on similar projects.

## **VIII. Proposal Submission**

Proposals should be prepared in a straightforward manner to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

Questions concerning this RFP shall be emailed to the RFP mailbox, at [rfp@stlidd.org](mailto:rfp@stlidd.org) by 5 p.m. (CST) **February 7, 2022**. All questions and responses will be posted to our website [www.stlidd.org](http://www.stlidd.org) no later than 5 p.m. (CST) **February 14, 2022**.

Address the Proposal to:           Shaelene Plank, Executive Director  
Email Address:                       [rfp@stlidd.org](mailto:rfp@stlidd.org)  
Subject Line:                         Strategic Planning Proposal

Deadline for Receipt of Proposal: No later than 5 p.m. (CST), **February 28, 2022**.

DD Resource's Board may request representatives of a bidding organization to appear for interviewing purposes. Travel expenses and costs related to the interview will be the responsibility of the bidder.

DD Resources will reach a decision on awarding the contract no later than **March 17, 2022**.

## **IX. Additional Information**

Consultants may provide any additional information they feel would assist DD Resources in the selection process.

**X. Proposal Review and Assessment**

Proposals will be evaluated to assess for highest-ranking. The proposer may be asked to make formal presentations to DD Resources Board. Consultants will be evaluated on the following criteria. These criteria will be the basis for the review of the written proposals and interview session.

**The rating scale shall be from 1 to 5, with 1 being a poor rating, 3 being an average rating, and 5 being an outstanding rating.**

**Proposal Evaluation**

| <b>PROPOSAL EVALUATION WEIGHTING FACTOR</b> | <b>QUALIFICATION</b>                             | <b>STANDARD</b>   |
|---|--|---|
| 2.0   | Scope of Proposal                                | <ul style="list-style-type: none"> <li>a. Does the proposal show an understanding of the project objective and results that are desired from the project?</li> <li>b. Is the methodology proposed?</li> </ul>   |
| 2.0   | Assigned Personnel                               | <ul style="list-style-type: none"> <li>a. Do the persons working on the project have the necessary skills?</li> <li>b. Are sufficient people of the requisite skills assigned to the project?</li> </ul>  |
| 1.0   | Availability                                     | <ul style="list-style-type: none"> <li>a. Can the work be completed in the necessary time?</li> <li>b. Can the target start and completion dates be met?</li> <li>c. Are other qualified personnel available to assist in meeting the project schedule if required?</li> <li>d. Is the project team available to attend meetings as required by the Scope of Work?</li> </ul> |
| 1.0   | Understanding of Industry and Participants needs | <ul style="list-style-type: none"> <li>a. Does the project team understand participant and industry needs?</li> </ul>   |
| 2.0   | Cost and Work Hours                              | <ul style="list-style-type: none"> <li>a. Do the proposed cost and work hours compare favorably with the committee's estimate?</li> <li>b. Are the work hours presented reasonable for the effort required in each project task or phase?</li> <li>c. Does the firm have the ability to meet deadlines and operate within budget?</li> </ul>                                  |
| 2.0   | Firm Capability                                  | <ul style="list-style-type: none"> <li>a. Does the consultant have the support capabilities required?</li> <li>b. Does the consultant have previous relevant and positive experience in jobs of this type and scope and success in planning?</li> <li>c. Does the firm have prior experience in working with a similar organization?</li> </ul>                               |

**Reference Evaluation (Top Ranked Proposer)**

The Executive Director and/or her designee will check references using the following criteria. The evaluation rankings will be labeled Satisfactory/Unsatisfactory.

| <b>QUALIFICATION</b> | <b>STANDARD</b> |
|----------------------|-----------------|
|----------------------|-----------------|

|                     |   |
|---------------------|---|
| Overall Performance | a. Would you hire this proposer again?<br>b. Did they show the skills required by this project?   |
| Timetable           | a. Was the original Scope of Work completed within the specified time?<br>b. Were interim deadlines met in a timely manner?               |
| Completeness        | a. Was the proposer responsive to client needs; did the proposer anticipate problems?<br>b. Were problems solved quickly and effectively? |
| Budget              | a. Was the original Scope of Work completed within the project budget?  |
| People Skills       | a. How did the proposer interact with the Board members and leadership staff, especially in areas of disagreement or general discussion?  |

### **XI. Conflict of Interest**

Applicants agree that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and DD Resources or DD Resources-funded agencies. Any perceived or potential conflict of interest must be disclosed in the proposal.