

**Request for Quote**

**COMMUNITY RENEWAL TEAM, INC.  
Request for Quote Strategic Planning Consultant**



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## INVITATION TO BID

The Community Renewal Team, Inc. (henceforth referred to as "CRT") is having an open request for quote (RFQ) for a Strategic Planning Consultant beginning Wednesday, September 11, 2019 until Wednesday, October 2, 2019.

- Beginning Wednesday, September 11, 2019, quote specifications may be downloaded on the CRT web site: [www.crtct.org](http://www.crtct.org) Business Solutions/Vendors and the State Portal at [www.biznet.ct.gov](http://www.biznet.ct.gov).
- **BY EMAIL:** Proposals will be accepted by electronic mail in PDF format to [crt-bids@crtct.org](mailto:crt-bids@crtct.org), the subject line must read "CRT Strategic Planning Consultant" however no responsibility will be attached to any person or persons for the non-receipt of a proposal submitted by electronic mail due to spam, incorrect email address, or any other like circumstance. Proposals sent by email must be received by Wednesday, October 2, 2019 at 3:00 p.m.
- **QUESTIONS:** Please direct all questions regarding this RFQ to Jeanette Dunbar at [dunbarj@crtct.org](mailto:dunbarj@crtct.org).
- Quotes from companies with prior experience working with non-profits will be considered.
- Late bids will not be accepted – no exceptions.
- Proposals must be submitted on the prescribed form.
- CRT is exempt from State or Federal taxes.

## ORGANIZATIONAL OVERVIEW

CRT is the largest community action agency in CT and one of the oldest continuously operating – providing services before the creation of community action agencies in 1964. The agency has built upon its grassroots foundation to become a broad-based, modern human services provider, pioneering results-based accountability and holistic case management models for all of its programs and customers. CRT currently has a workforce of almost 400 employees and an annual operating budget of \$48 million.

CRT's mission is "Preparing our Community to Meet Life's Challenges" and it conducts daily operations to fulfill this charge by incorporating the following core values: acting with integrity and responsibility; delivering quality programs and services; treating all people with dignity and respect; and constantly pursuing excellence.

CRT has 55+ years of experience in operating programs in the following 10 core support areas: Basic Needs; Community Corrections; Early Childhood Education and Youth; Employment and Training; Energy and Weatherization; Shelters and Housing; Mental Health and Wellness; Money Management; Senior Services; and Veteran Services.

CRT is a community action agency and is bound by CSBG regulations and organization standards. The Strategic Process should be guided by these regulations, in particular Informational Memorandum (IM) 138 by the federal Office of Community Services which established CSBG



Organizational Standards 6.1 through 6.4. Some of the Comprehensive Guides and technical assistance planning documents are attached, and others can be found on the Community Action Partnership website: <http://www.communityactionpartnership.com/>

In addition to CSBG mandates and organizational standards, CRT must ensure that there is a connection between strategic planning and the Results Oriented Management and Accountability (ROMA) framework. As a result of Government Performance and Results Act (GPRA) passed by congress in 1993, the Office of Community Services formed the Monitoring and Assessment Taskforce (MATF). In 1994, the MATF produced a National Strategic Plan endorsing a results-oriented approach for community action agencies (CAAs). In addition, agencies must:

- Meet a clearly identified community need
- Result in community change that is observable, measurable, and a direct result of the initiative
- Include community strategies that engage external stakeholders (e.g. customers, community partners or others in the community)

## **PROJECT PURPOSE**

Community Renewal Team is seeking proposals from qualified consultants to assist with the design, development, and implementation of a multi-faceted process for its next 3-year strategic plan (2021-2023). The goal of this process is to:

- Analyze CRT's strengths, weaknesses, opportunities and threats.
- Discuss the barriers that face our community and CRT's ability to effect change.
- Work in collaboration with CRT to develop the Community Needs Assessment and Community Action Plan.
- Perform a 360-degree analysis.
- Gather information from funders (current and prospective), clients, external stakeholders, board, and staff through surveys, interviews, and/or focus groups to understand needs, their perspective on CRT, and the changing environment.
- Work with leadership to ask pointed questions about agency direction and benchmarks.
- Assist in developing short- and long-term goals and objectives based on key indicators.
- Share with leadership innovative approaches and opportunities that CRT can implement to address gaps.
- Assist with identifying potential areas for agency growth, untapped funding opportunities, and potential entrepreneurial avenues.
- Develop a Local Theory of Change.

## **RIGHT OF THE OWNER TO TERMINATE CONTRACT**

Failure of a contractor to deliver within the time specified or to deliver within the time extended by CRT, and failure to make replacements of rejected articles when so requested, immediately or as directed by CRT shall constitute contract default.



**RIGHT OF REJECTION**

This is not an offer to contract. Acceptance of a proposal neither commits CRT toward a contract to any bidder, even if all requirements stated in this bid are met, nor limits the right to negotiate in the best interest of CRT. CRT, in its sole and absolute discretion, reserves the right not to contract with any bidder for any reason.

CRT also reserves the right, in its sole and absolute discretion, to accept or reject any and all bids in whole or in part, to waive any irregularity and/or informality in any bid and to request and receive additional information from any bidder when such acceptance, rejection, waiver or request as deemed by CRT to be in the best interest of CRT.

Community Renewal Team, Inc. may reject or accept any and all bids in whole or in part or to waive any informality in bids received if in their opinion, it is deemed in the best interest of the organization to do so.

**INDEMNIFICATION AND INSURANCE**

The selected contractor shall at all times indemnify and hold harmless CRT and its officers, agents and employees on account of and from any and all claims, damages, losses, judgments, workers' compensation payments, litigation expenses and legal counsel fees arising out of injuries to persons (including death) or damage to property.

The contractor shall carry liability insurance, which shall include coverage for, acts of independent contractors or sub-contractors. Such policy shall include the minimum coverage's detailed below.

- The contractor shall provide liability insurance and name "Community Renewal Team, 555 Windsor Street, Hartford, CT 06120" as additional insured on the Certificate of Insurance.
- Contractor shall provide a Certificate and other evidence of such insurance to CRT at the signing of the agreement and upon demand any time thereafter during the duration of this agreement in amounts acceptable to CRT not less than the following:
  - General Liability (\$1,000,000 each occurrence/\$2,000,000 general aggregate);
  - Automobile Liability (\$1,000,000 each accident);
  - Professional Liability (\$1,000,000 each occurrence) or
  - Umbrella Liability (\$1,000,000 each occurrence);
  - Workers Compensation (\$1,000,000 each accident, \$1,000,000 each employee, \$1,000,000 disease policy limit).

**EQUAL OPPORTUNITY - AFFIRMATIVE ACTION**

CRT shall not enter into any contract for purchasing with any person, agency, or organization if it has knowledge that such person, agency, or organization discriminates against any applicant, employee, or service recipient on the basis of race, color, religion, national origin, sex, age, sexual orientation or disability; or any person, agency, or organization who fails to comply with all federal and state anti-discrimination laws.



## **CONFIDENTIAL INFORMATION**

During the course of its contract with CRT, Contractor may encounter confidential agency and/or client information. Contractor agrees, as a condition of this bid to save and protect any such confidential information, shall hold the same in confidence, shall not use the Confidential Information other than for the purposes of its business with CRT, and shall not disclose it to anyone without the specific prior written authorization of CRT.

## **METHOD OF AWARD**

Bids will be awarded to the most responsible, responsive and qualified Contractor as determined by CRT.

Interviews may be scheduled with candidates that have submitted proposals as part of the selection process.

The delivery date shall be a factor considered in awarding a Contract and may result in an award offered to a vendor other than the low bidder.

Until a contract has been executed, no vendor can claim any contract rights by virtue of the receipt of the notice of acceptance of proposal alone. Awarding of the contract shall mean that a contract agreement has been executed by both the accepted vendor and CRT.

CRT reserves the right to add, modify or delete the proposal requirements or terminate the RFQ without awarding this project to a vendor. The decision of CRT is final and cannot be appealed.

In the event that there is a discrepancy between price written in words and in figures, the price written in words shall govern.

## **ERRORS, INTERPRETATIONS AND ADDENDA**

All information given by CRT except by written addenda shall be informal and shall not be binding upon CRT nor shall it furnish a basis for legal action by any bidder against CRT

## **REQUIREMENTS**

Bid submissions should include:

1. Cover letter
  - Must include a point of contact address, telephone number, and email address.
2. Methodology
  - A description of philosophy toward strategic planning as well as detail regarding bidder's technical approach/methodology to the requirements found in the scope of work. This should include (but is not limited to) specific planning and facilitation tasks to achieve each of the objectives in the scope of work. Preferred planning methods should be



detailed to clearly demonstrate how the bidder engages stakeholders in the planning process. The technical approach should also address expected roles and responsibilities and include a project management plan.

3. Experience

- A statement of management approach and qualifications responsive to the qualifications listed in this RFP. This section should provide evidence that the bidder is knowledgeable about the requirements of Community Action Strategic Planning. It should also provide a description of recent experience in facilitating strategy planning processes of similar size, scope, and complexity.

4. Work Samples

- Examples of previously developed surveys/questionnaires; reports from focus groups/survey analysis; statistical analysis of primary data; strategic plan reports. Proprietary information that the Consultant wishes to remain confidential should not be included in response materials.

5. References

- Provide contact information for a minimum of three professional references who can speak to performance on similar strategic planning projects.

6. Budget

- A detailed budget and narrative inclusive of all expenses. The cost proposal should include total costs for performing all tasks listed in this RFP. Price shall be broken out by major task and planned deliverables and shall include proposed labor categories, hourly rates, and number of hours. All other costs (such as travel, etc.) should also be provided. The budget for "Implementation" should be itemized separately from that of the general Strategic Planning process. The budget narrative should describe all underlying budget assumptions.

Review and consideration of proposals will begin immediately after the deadline for submission and will include interviews with qualified respondents at the discretion of CRT.

### Attachments

For background and/or clarifying information please reference the following materials included with this RFP under separate cover:

- 2018 CRT CAP Report
- 2018 CRT CSBG Annual Report
- Comprehensive Guide to Community Action Strategic Planning

Other relevant materials may be found on the Community Action Partnership website:

[www.communityactionpartnership.com](http://www.communityactionpartnership.com)

**ADDITIONAL DOCUMENTS TO BE SUBMITTED**

- Bid Form (Attachment I)
- Reference form (Attachment II)
- Sample Certificate of Insurance (COI) as outlined in Indemnification and Insurance on Page 4



<b>SCOPE OF SERVICES</b>
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CRT will conduct an intensive process to develop its next 3-year strategic plan (2021-2023). The agency seeks an experienced and highly engaging Consultant to facilitate a process that enables the Steering Committee to take a hard look at priorities and strategic direction while also keeping the process stimulating and meaningful for all involved. This strategic planning process should be inclusive of a broad array of stakeholders, including CRT Board members, staff, other area community service organizations, and CRT clients. Data gathered from this process will also be used by CRT to update its Community Needs Assessment. Finally, this process offers an opportunity to take a fresh look at how to achieve the agency's mission.

CRT will establish a Steering Committee that will participate in the strategic planning process and assist with various implementation tasks. The Committee will consist of CRT leadership, Board members, and selected staff. The Consultant will design and guide the process and lead certain strategic planning tasks, including: coordinating regular Steering Committee meetings; conducting a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis with the Board of Trustees and senior management; facilitating two Strategic Planning retreats; gathering data from clients, community, and staff; conducting interviews with external stakeholders; and developing a Local Theory of Change.

The Consultant shall provide services as indicated below:

**A - Planning and Communication:** Inform overall design of strategic planning process, including developing interactive and creative methods for gathering and incorporating client and stakeholder input. Maintain project planning and ongoing communication with CRT strategic planning lead. The Consultant will be responsible for organizing, setting the agenda for, and leading Steering Committee meetings. The Steering Committee will meet every three weeks from October 2019-March 2020, and as needed thereafter for the remainder of the contract period.

**B - Information gathering and synthesis:** Design and implement methods to gather input from a variety of groups. The Consultant will assist with survey design and focus group implementation. The Consultant will conduct a SWOT exercise with the Board of Trustees, CRT leadership, and staff. Working with CRT leadership, the Consultant will select the types of tools used to gather assessment information (surveys, focus groups, etc.) The Consultant will conduct a set of live interviews with key external partners and funders (approximately 20-25 interviews). The Consultant will synthesize and identify key themes from stakeholder input, including qualitative and quantitative analyses. Direct feedback will be solicited from:

- **Staff** – approximately 30 individuals from all levels of the agency
- **Board of Trustees** – approximately 15 members
- **Clients** – a statistically appropriate population as determined by Consultant
- **External Stakeholders** – approximately 15-20
- **Corporate Foundations** – approximately 3-5 foundations that are not yet familiar with CRT





Once they are developed, CRT will produce the surveys and provide Consultant with mailing lists, space for meetings, access to IT systems, and other logistics necessary for data collection. The Consultant will formulate questions for focus groups, facilitate focus groups, and ensure documentation of content. The Consultant will be responsible for data entry and analysis of all survey/interview information. In addition, the Consultant will work with CRT to design a method of organizing and analyzing existing program/client data already collected by the agency.

C - Goal and outcome formation: The consultant will design, facilitate, and evaluate a two-day Strategic Planning retreat to generate strategic plan goals and key outcomes. The goal of the retreat will be to:

- Review and revise (as necessary) vision and mission statements
- Review needs assessment and internal assessment data and identify agency priorities
- Develop short- and long-term goals
- Determine key strategies and brainstorm partnerships for goal attainment
- Begin work on developing Theory of Change

D - Strategic Plan Documentation: The Consultant will produce a written summary of the strategic planning process and the resulting 3-year plan. This summary will follow CSBG organizational standards and align with national goals and indicators. The Strategic Plan will align CRT's mission, core values, service priorities, and resources and provide answers to the following questions:

- How does the agency want to evolve over the next three years?
- How will the agency achieve these goals? What actions does CRT need to take to improve?
- What key performance indicators will measure success?

The plan will articulate priorities and goals based on community needs, building on agency and community strengths and will include an agency-based Theory of Change. The Consultant will work with CRT to structure an internal process to ensure cross-functional commitment and metrics for measuring progress toward goals. This process should include a timeline for regular re-evaluation of the Strategic Plan and assessment of agency priorities.

E - Final Presentation: The Consultant will design, facilitate, and evaluate a second retreat, during which he/she will present the final Strategic Plan and set the stage for successful implementation.

F – Implementation: The consultant will help operationalize and implement the Strategic Plan and work with staff to establish performance measures for evaluating progress.

### **Deliverables:**

The Consultant will be responsible for the following deliverables (at minimum):

1. Written overview of methodology
2. SWOT analysis
3. Written summary of qualitative and quantitative data analysis
4. Analysis of survey results, interviews, and focus group discussions
5. Local Theory of Change



6. Minutes/summary of Steering Committee meetings
7. Summaries of kickoff meeting and presentation retreat (including decisions related to priorities, goals, and objectives)
8. Strategic Plan (including implementation schedule and plan for ongoing measurement of progress toward goals)

### Service Period and Timeline

The period of performance for the Strategic Planning Consultant will begin no later than Oct. 21, 2019, and end on July 31, 2020.

A detailed work plan laying out the specific deliverables and timeline for the strategic planning process will be developed within the first 30 days of engagement. Some project milestones are outlined below:

Milestone	Notes	Due Date
Initial meeting	Develop SWOT format, survey design, develop list of stakeholders	October 2019
Agency SWOT analysis		
Detailed work plan		
Kickoff meeting (2-day retreat)	Present SWOT analysis, develop goals	Nov/Dec 2019
Data gathering	Survey distribution, collection, analysis; stakeholder interviews	
Survey report		
Local Theory of Change		
Presentation Retreat		Mid-April 2020
Strategic Plan Draft		May 15, 2020
Final Strategic Plan and all deliverables		May 29, 2020
Presentation to Board		June 2020



## Location of Performance

Planning activities, in-person interviews, and presentations to the Board will take place at venues within the Greater Hartford, CT, area. At the discretion of CRT leadership, some activities related to this project may be conducted remotely.

## Compensation

Under this contract, the price quoted will be for all work and will be inclusive of all expenses including travel. Quotes should indicate costs related to specific activities and deliverables within the scope of work and timeframes for completion.

## Qualifications

- Experience developing strategic plans and options for funding strategies.
- Experience developing and implementing methods of gathering meaningful data to support planning.
- Experience facilitating inclusive, collaborative processes including direct experience working with Board members and all levels of staff at nonprofit organizations as well as engaging community members to initiate and execute strategic planning.
- Experience building consensus among individuals with varying perspectives and opinions.
- Strong written and oral communication skills.
- Strong analytical skills and tools.
- Demonstrated ability to work collaboratively with a diverse group of stakeholders.
- Demonstrated ability to organize complex tasks and complete them in a timely manner.
- Experience working with a large, multi-service nonprofit agency that provides a diverse set of community programs.

**ATTACHMENT I  
 BID FORM**

**AUTHORIZATION AND EXECUTION OF BID**

- I. The undersigned bidder, having fully informed themselves regarding the accuracy of the statements made herein, agrees to abide by the conditions set forth in the attached bid document, and certifies that:
  - a. The propose bid has been presented by the bidder independently and has been submitted without collusion and without any agreement, understanding, or planned common course of action designed to limit independent bidding or competition, with any other vendor of materials, supplies, equipment or services described in the invitation to bid.
  - b. The bidder has submitted this bid without collusion with CRT, any of its affiliated companies, or any employee thereof, and is unaware of any direct, personal pecuniary interest of any employee of CRT or any of its affiliated companies in the outcome of this bid.
  - c. The bidder has not communicated the contents of the bid to its employees or agents to any person not an employee or agent of the bidder or its surety on any bond furnished with the bid, and will not be communicated to any such person prior to the official opening of the bid.
  - d. The bidder has not been debarred, suspended or excluded from any publicly-funded projects or programs.
  - e. The bidder has become familiar with and has agreed to comply with the terms and conditions of the specifications and all other contract documents and with all Federal, State and Local Laws, Ordinances or Regulations which in any manner relate to the furnishing of the equipment, material or services in accordance with the Contract.
  
2. The undersigned bidder further certifies that this statement is executed for the purpose of inducing the Community Renewal Team to consider the bid and make an award in accordance therewith.
  
3. Complete & Sign

Legal Name of Bidder	
Business Address	
Phone #	
Email	
Print Name & Title of Authorized Agent	
Signature	



**ATTACHMENT II  
REFERENCE FORM**

**Contractor Name:** \_\_\_\_\_

**Reference #1:**

Name of Company \_\_\_\_\_

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

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

_____	_____	_____	_____
City/Town	State	Zip Code	Telephone

Description of work/project/products completed for or sold to this customer:

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

**Reference #2:**

Name of Company \_\_\_\_\_

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

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

_____	_____	_____	_____
City/Town	State	Zip Code	Telephone

Description of work/project/products completed for or sold to this customer:

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

**Reference #3:**

Name of Company \_\_\_\_\_

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

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

_____	_____	_____	_____
City/Town	State	Zip Code	Telephone

Description of work/project/products completed for or sold to this customer:

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