

STRATEGIC PLANNING CONSULTANT/FACILITATOR
REQUEST FOR PROPOSALS
SYNOPSIS

The Developmental Disabilities Resource Board of St. Charles County (DDRB) is seeking a candidate or firm to facilitate the creation of a 5-year Strategic Plan.

Closing Date: An electronic copy of the completed proposal must be received no later than **3:00 p.m. CST on October 3, 2023**

Submit To: dcross@ddrb.org

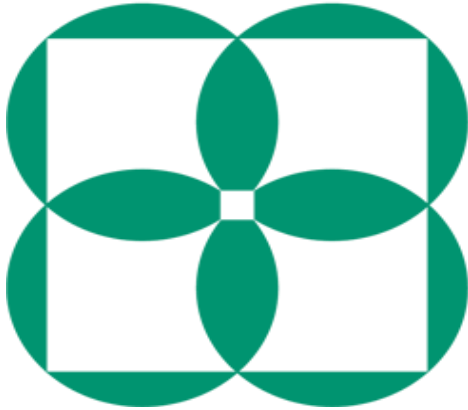
Contact: Denise Cross, Executive Director
Phone: (636) 939-3351
dcross@ddrb.org

To access the RFP or ask questions:

Technical assistance is limited to answering questions regarding clarification of RFP instructions, definitions, or terms.

- Go to <https://www.ddrb.org/news>
- To ask a question, email Denise Cross at dcross@ddrb.org

DDRB



**Developmental
Disabilities
Resource Board
of St. Charles
County**

**Request for Proposal
Strategic Planning
Consultant/Facilitator**

Proposals accepted through:

October 3, 2023

5:00 PM CST

Mission: The DDRB is a leader, ensuring that individuals with developmental disabilities living in St. Charles County have quality opportunities and choices to be fully included in society.

Request for Proposal

I. General Information

Project Objective: To develop a 5-year Strategic Plan to begin in FY25 (July 1, 2024)

Issuing Organization: Developmental Disabilities Resource Board of St. Charles County

RFP Issued: September 12, 2023

Questions must be received by: September 19, 2023

Responses to questions: September 26, 2023

Due date for proposals: October 3, 2023

II. Background

The Developmental Disabilities Resource Board of St. Charles County (DDRB) is a public taxing entity, commonly known as a “Senate Bill 40 Board”, that enters into funding contracts with agencies that serve individuals with intellectual/developmental disabilities in St. Charles County (the County). This public tax was established in 1977 when voters of the County approved taxing themselves up to sixteen cents per \$100.00 of assessed property valuation to provide community-based services and supports for citizens with intellectual/developmental disabilities.

A nine-member volunteer Board of Directors (the Board) appointed by the St. Charles County Executive sets the financial and administrative framework for DDRB and hires and directs the Executive Director to conduct the everyday operations. In May 2006, the DDRB began providing case management to individuals 18 years of age and older through an agreement with the Department of Mental Health Division of Developmental Disabilities. The DDRB provides case management services to individuals 16 and 17 years of age regardless of Medicaid status and individuals 18 years of age and older with active Medicaid.

III. Executive Summary

Thank you for your interest in this project. The DDRB is in a unique stage of its evolution. Recent changes in leadership roles such as the Executive Director and Finance Director, along with industry changes, make this an exciting and crucial time for the DDRB to engage in strategic planning.

The DDRB takes its mission very seriously and is a value driven organization. It is committed to maintaining its status as a leader, not limited to the intellectual/developmental disabilities field, but also in all ways it can support the community. The Board of Directors is knowledgeable, committed, and involved. They pride themselves on being a great partner in the cultivation of an excellent array of services available to St. Charles County residents. Additionally, they are proud to be a partner that helps make St. Charles County a great place to live for all. It is evident that the board, staff, and community are eager to take a deep look into the current needs and desires of the intellectual/developmental disability community. It is also important that the voice of the people the DDRB is created to support is heard. This selected partner will find teamwork, curiosity, and passion for this project. We look forward to a thoughtful and informed process and the development of a highly meaningful and actionable plan.

IV. Scope of Work

The DDRB 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 input from the intellectual/developmental disability community, the DDRB Board, leadership, employees, and the public (this list is not meant to be exhaustive).

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

- Evaluate funding practices and service priority areas.
- Evaluate trends and opportunities within our Targeted Case Management Program, providing overall goals and direction for the program.
- Develop a process for DDRB 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.
- Identify additional areas of opportunity for collaboration and innovation that are consistent with the DDRB's identity.
- Identify trends in the intellectual/developmental disability community and services that will affect DDRB, both positively and negatively.

The consultant will work with the full Board and/or a board committee, leadership staff, members of the intellectual/developmental disability community, and other selected staff or stakeholders.

V. Deliverables

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

- A Description of the Strategic Plan development process, how input was gathered, validated, and from whom it was received
- 5-year Organizational Strategic Plan including strategic priorities, objectives, and action items
- A measurement and reporting approach on progress made on the Strategic Plan
- A picture of the future that outlines the DDRB's long-term strategic direction

VI. Timetable

September 19, 2023
September 26, 2023
October 3, 2023

Questions from Respondents due
Responses to questions sent
Proposals due

October 12 and 13, 2023	Interviews with Selected Respondents
October 19, 2023	Reach award decision
November-December, 2023	Planning activities
December '23 – March '24	Execution of activities
April 2024	Plan completed
May 16, 2024	Board approval of plan
July 2024	Plan Implementation

VII. 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 DDRB’s Board.

VIII. 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 DDRB’s strategic plan.

Section 3. Work Plan

Provide information about proposed activities that would involve key stakeholders such as the intellectual/developmental disability community, DDRB Board, staff, and the public . Also, provide a timetable for completing the process within the timeframe in Part V of this proposal. Specify what activities would be completed by DDRB 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, along with work samples or case studies of recently completed work

IX. 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 Denise Cross, Executive Director, at dcross@ddrb.org by 5 p.m. (CST) September 19, 2023. All questions and responses will be posted to our website www.ddrb.org no later than 5 p.m. (CST) September 26, 2023.

Address the Proposal to: Denise Cross, Executive Director Email Address: dcross@ddrb.org
Subject Line: Strategic Planning Proposal

Deadline for Receipt of Proposal: No later than 5 p.m. (CST), October 3, 2023.

DDRB'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.

DDRB will reach a decision on awarding the contract no later than **October 19, 2023.**

X. Additional Information

Respondents may provide any additional information they feel would assist DDRB in the selection process.

XI. Proposal Review and Assessment

Proposals will be evaluated to assess for highest-ranking. The proposer may be asked for an interview and/or to make formal presentations to DDRB’s Board or Committee. Respondents 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

PROPOSAL EVALUATION WEIGHTING FACTOR	QUALIFICATION	STANDARD
2.0	Scope of Proposal	Does the proposal show an understanding of the project and results that are desired from the project? Is the methodology proposed?
2.0	Assigned Personnel	Do the people working on the project have the necessary skills? Are sufficient people of the requisite skills assigned to the project?
1.0	Availability	Can the work be completed in the necessary time? Can the target start, and completion dates be met? Are other qualified personnel available to assist in meeting the project schedule if required? Is the project team available to attend meetings as required by the Scope of Work?
1.0	Understanding of Industry and Participants needs	Does the project team understand participant and industry needs? Does the project describe how input will be received from stakeholders including with the intellectual/developmental disabilities community, partnering agencies, employees, the tax paying public, and so on?
2.0	Cost and Work Hours	Do the proposed cost and work hours compare favorably with the committee's estimate? Are the work hours presented reasonable for the effort required in each project task or phase? Can the firm meet deadlines and operate within budget?
2.0	Firm Capability	Does the respondent have the support capabilities required? Does the respondent have previous relevant and positive experience? Does the firm have prior experience in working with an organization that is similar?

Reference Evaluation (Top Ranked Proposals)

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

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

XII. Conflict of Interest

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

XIII. Contractual Agreement

The DDRB will enter into an appropriate engagement agreement with the selected applicant.

XIV. Confidentiality

The User understands the confidential nature of the Request for Proposals and agrees to protect it in the same manner as it would its own confidential information, and not disclose the Confidential Information to third parties or use the Confidential Information other than as provided for in this Agreement.

XV. Rights Reserved to the DDRB

The DDRB reserves the right to reject any and all proposals or to waive any irregularities and omissions if, in its judgement, the best interest of the DDRB will be served.