



## **REQUEST FOR PROPOSAL**

Strategic Planning

RFP Issued Date: Apr 29, 2022  
Responses/ Proposals Due: Jun 9, 2022

Approximate Award Date: Jun 30, 2022

## INTRODUCTION

Semcac, a nonprofit Community Action Agency (CAA), is seeking proposals from qualified parties for assistance in preparing, moderating and creating a Strategic Plan. The agency-wide Strategic Plan needs to follow the Community Service Block Grant (CSBG) Organizational Standards.

### Semcac's Mission & Vision

**Mission:** Empower and advocate for people to enhance their self-sufficiency by maximizing community resources.

**Vision:** Thriving individuals, families and communities leading a vibrant southeast Minnesota region.

### BACKGROUND

Semcac is a nonprofit 501c3 CAA established in 1966. CAAs were created under the Economic Opportunity Act of 1964 to fight America's War on Poverty. Today there are over 1,000 CAAs in the United States, with 24 being in the state of Minnesota. These agencies provide direct support for people who live in poverty to help them achieve self-reliance.

Semcac serves southeastern Minnesota counties including Dodge, Fillmore, Freeborn, Houston, Mower, Steele and Winona Counties and provides limited services in Rice, Goodhue, Wabasha, Waseca and Olmsted counties.

As a CAA, and recipient of CSBG funds, Semcac is required to prepare a Strategic Plan every five years and report on progress yearly to the governing board to ensure the agency's mission is moving forward. The last Strategic Plan was prepared in 2017.

### CSBG Organizational Standards - Regarding Strategic Planning

The CSBG Organizational Standards, issued in 2015, that address expectations of the agency's Strategic Plans are as follows:

6.1 The organization has an agency-wide strategic plan in place that has been approved by the governing board within the past 5 years.

6.5 The governing board has received an update(s) on progress meeting the goals of the strategic plan within the past 12 months.

### STRATEGIC PLAN PROJECT - SERVICES

Semcac is seeking responses to this Request for Proposal (RFP) in order to contract a party for assisting in formulating a Strategic Plan that aligns with the agency's mission and vision statements.

## Scope of Work

1. Create and lead a Strategic Planning process, including facilitating staff (& board members') input via creative meetings, which result in a full plan that the agency can utilize for goals and objectives in the next five years. (Organizational Standard 6.1)
2. Work with the Planning and development Director and Executive Director at Semcac to ensure the process is comprehensive, inclusive and relevant. Submit an outline of your process with a loose timeline.
3. Work with staff to create a Strategic Plan that will have measurable, annual goals. (Organizational standard 6.5).
4. Create a final Strategic Plan, in publishable format, with all rights given to Semcac for its use as deemed appropriate.
5. Present a summary of the final Strategic Plan to the Semcac Board of Directors at a monthly board meeting, upon completion. (May be presented virtually.)

## Proposal Requirements

1. An intro page or letter explaining interest, summarizing relevant qualifications and experiences.
2. Provide the full name, address, and phone number of your main office and contact information. Include the email and direct phone number of the individual who is the primary contact for the RFP.
3. Describe experience- including working with Community Action Agencies and/or nonprofits preparing Strategic Plans. Provide/attach example(s) if possible.
4. Proposed cost of the service to include estimated incidental expenses.
5. Include a brief summary overview describing how you foresee administering this project successfully. Please include a brief project timeline.
6. Provide two professional references including Name, Address, Email, Phone #
7. Include any information that you think will enhance the RFP.

## Semcac Responsibilities

1. Work with the contracted party to ensure relevant, forward-thinking information and goals are included in the Strategic Plan.
2. Work with the contracted party to provide relevant information needed to help formulate the Strategic Plan in accordance with the agency's mission and vision statements.
3. Approve/Review the overall timeline of the project and provide feedback.
4. Provide Semcac logo for materials and related needs.

5. Assist with communicating with leadership staff and board members, when appropriate.
6. Assist with encouraging participation from staff/board, in the creative process.
7. Reimbursement of the contracted party for expenses as outlined in the final contract. Timely payment of invoices received.

### Payments

The payment schedule will be negotiated as part of the contract for services. Requests for payment shall be processed upon the receipt of invoices from contracted party. All invoices shall document the tasks completed and other billable expenses.

### Selection Process

The proposals submitted will be evaluated by an internal team utilizing the (100) point system indicated below. We anticipate that the selection will be completed within a month of receipt.

1. The capacity of contracted party to perform work in a timely manner. (15 points)
2. Ability to formulate a Strategic Plan with the agency's mission & vision statements in mind. Knowledge of Strategic Planning & Community Action, including examples. (20 points)
3. Experience moderating and facilitating meetings/groups effectively. (15 pts)
4. Strength of process/project summary. (30 pts)
5. Competitiveness of proposed cost. (15 points)
6. Other relevant strengths. (5 pts)

### How to Submit Proposals

**Please email proposal submissions. Send to Cheryl at [Cheryl.boone-perez@semcac.org](mailto:Cheryl.boone-perez@semcac.org)**

Submit proposals by 5:00pm on **Jun 9, 2022**

Direct questions regarding this RFP to Annette Theobald, Planning & Development Director at [annette.theobald@semcac.org](mailto:annette.theobald@semcac.org) | D: 507.298.4027 or Semcac Main Office: 507.864.7741

### Independent Contractor

It is expressly understood that all persons employed by Semcac in the performance of any work or services required or provided in the awarded contract is an independent contractor and shall not be considered employees of Semcac for any purposes whatsoever. Including, but not limited to, workers' compensation coverage, unemployment insurance benefits, social security coverage, or retirement membership or credit, or any such claims shall in no way be the obligation or responsibility of Semcac.

*The successful responder must provide W9 tax documentation.*

### Insurance Requirements

The successful responder must provide a Certificate of Insurance. If the responder is self-insured, they must provide a Certificate of Self-Insurance. Maintain general liability insurance with minimum limits of \$1,000,000 occurrence & aggregate.

This RFP does not obligate Semcac to award a contract, and Semcac reserves the right to cancel the solicitation if considered to be in our best interest. Semcac reserves the right, for any reason to accept or reject any one or more proposals submitted. Semcac is not liable for any cost incurred by proposers in replying to this RFP. All submissions become the property of Semcac.