



CSRA Economic Opportunity Authority, Inc.
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REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING

PURPOSE

The CSRA Economic Opportunity Authority, Inc. (CSRA EOA, Inc.) has initiated a Request for Proposal (RFP) process to identify a qualified vendor to guide and execute a strategic visioning and comprehensive planning process.


WHO MAY RESPOND

CSRA EOA, Inc. seeks a vendor who has demonstrated experience in successfully developing consensus-based strategic plans, has strong facilitation skills, has proven experience with non-profit strategic planning, and a strong understanding of the structure and purpose of community action agencies and an understanding of Community Services Block Grant and Head Start Programs.

Vendors submitting proposals must include a statement indicating that the respondent is not on the U.S. General Services Administrator's System for Award Management's (SAM's) list of excluded entities.

SIGNIFICANT DATES

RFP Released: Tuesday, April 15, 2022
RSVP for Bidders Conference by: April 29, 2022 at 12:00 noon
Virtual Bidders Conference: May 6, 2022 at 10:00 a.m.
Proposals due: Monday, May 23, 2022
Vendor selection: May 31, 2022
Project begins: June 1, 2022

Leveraging resources, Empowering peOple, and Advocating
to alleviate poverty in the CSRA 

www.csraeoa.org

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1. About the Organization

Founded in 1966, CSRA Economic Opportunity Authority, Inc. (CSRA EOA) is a 501(c)(3) nonprofit Community Action Agency serving the counties of Burke, Columbia, Emanuel, Glascock, Jefferson, Jenkins, Lincoln, McDuffie, Richmond, Screven, Taliaferro, Warren and Wilkes (and Bulloch for Head Start only) in Georgia. Created through the Economic Opportunity Act in 1964, Community Action Agencies all have, at the core of their mission, “the elimination of the paradox of poverty in the midst of plenty, by opening to everyone the opportunity for education and training, the opportunity to work, and the opportunity to live in decency and dignity”. Our mission is to leverage resources, empower people and advocate to alleviate poverty in the CSRA. CSRA EOA, Inc. operates programs, projects, and services aimed at achieving the organization’s mission; innovative, comprehensive, life changing activities that produce quality results in providing a hand up, in garnering resources to strengthen a family and the community. Some of these programs and initiatives include Head Start, Early Head Start, Low-Income Home Energy Assistance, Supportive Services for Veteran Families, Weatherization Assistance Program, and a variety of programs through the Community Services Block Grant, such as our Home Ownership Planning and Education, Homeless Prevention, Senior Nutrition and Wellness, and Crisis Intervention. CSRA EOA, Inc. strives to keep the promise of community action, which is, “Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.” CSRA EOA, Inc. programs are supported through significant partnerships within the communities we serve.

Our core values include integrity, dedication, respect, compassion, cultural competence, diversity, professionalism, accountability, and teamwork. These values are essential as we strive to treat all people with dignity and take action in a united purpose to achieve excellence in the work we do to accomplish the mission of our agency.

Our 27-member tripartite Board of Directors includes public officials or their representatives (1/3), representatives of business, industry, labor, religious, social service, education or other major groups (up to 1/3), and representatives of the low-income communities we serve (at least 1/3). The Board of Directors is fiscally and legally responsible for our agency. This representation provides low-income community members the opportunity to work with elected officials, local organizations and businesses during the development of solutions to poverty, and ensures that they have a stake in their community.

Programs or services administered by each entity must support activities and services designed to assist low-income families and individuals to become self-sufficient. These programs and services are guided by three broad anti-poverty goals to include: (1) Individuals and families with low income are stable and achieve economic security. (2) Communities where people with low incomes live are healthy and offer economic opportunity. (3) People with low incomes are engaged and active in building opportunities in communities. Additionally, CSRA EOA, Inc. works to increase our capacity to achieve results through

partnerships, leveraging resources, developing the capacity of our Board, Policy Council, Staff, and Volunteers.

To accomplish these goals, programs are designed following the principles of Results-Oriented Management and Accountability. The needs and conditions of poverty in the community must be assessed and a clear anti-poverty mission and strategy to address needs in the context of existing resources and opportunities in the community must be considered. Programs, services and activities must include specifically targeted outcomes (results) to achieve anticipated results. Results must be documented and recorded, and information on outcomes must be reported and used to inform annual and long-range planning.

In our current strategic plan (April 2017 – March 2022) five of our key strategies included:

1. Integrating and implementing new operating standards into overall operating plans, goals, and outcomes.
2. Strengthening partnerships to increase involvement and engagement in antipoverty initiatives.
3. Enhancing program and service availability by developing on-line training, information and scheduling.
4. Increase leveraging of resources, maintain and increase (individual and businesses donors & foundations) diversity of revenue sources and expand on financial partnerships.
5. Enhance agency feedback mechanisms.

More information on the organization is available at www.csraeoa.org.

2. Project Overview

CSRA EOA, Inc. currently employs approximate 400 staff members. Staffing levels fluctuate based on funding.

Since 2019, CSRA EOA, Inc. has experienced significant changes to the COVID Pandemic, having to increase the use of technology in service delivery, and in funding streams. We have hired a new Fiscal Officer, are in the process of hiring a new Head Start Director (previous one retired), and have recently had board member turnover (retirements).

To help capitalize on these changes, CSRA EOA, Inc. is looking for a consultant to create a strategic plan through a comprehensive and participatory process.

3. Bidders Conference

A Bidder's Conference will be held virtually to answer any questions potential bidders may have as it relates to this project or the agency. To attend, an organization or consultant must register (RSVP), by sending an email as follows:

Subject Line: Strategic Plan Bidders Conference

In the body of the email, provide the name and email address of the person(s) attending from your organization. This will be the opportunity to ask questions for this project, and will ensure all applicants have questions addressed and receive uniform answers to and benefits obtained by the answers to the questions.

4. Scope of Work and Deliverables

We expect the project to include the following:

- Project management
- Design and execution of a strategic visioning and comprehensive planning process
- Develop an actionable strategic plan, including a projected budget for implementation
- Develop recommendations regarding the plan's implementation and support structure

The proposal should include:

- Understanding of the work to be performed, estimated hours, and other pertinent information.
- Organization description, size and structure. Indicate whether the firm is a small or woman- or minority-owned business.
- Qualifications of all staff to be assigned to the project and specify the project manager.
- Resumes of staff to be assigned to the project. Education, position in firm, years and type of experience, continuing professional education, etc., will be considered. Vendor may not sub-contract out any of the work without the pre-approval of the sub-contractor by CSRA EOA, Inc.

It is expected that these tasks will be accomplished through a combination of activities, including:

- Background research by consultant on CSRA EOA, Inc. history and current leadership team, including environmental scan of organization and opportunities ahead.
- Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner and community input.
- Facilitated group meetings with the board and staff to create consensus regarding a strategic vision and plan, from which the agency will develop action plans.

5. Project Goals and Target Audience

While CSRA EOA, Inc. seeks the consultant's recommendations regarding the best process to develop an actionable strategic plan, the organization envisions the scope of work will be completed in stages.

Stage 1. Discovery - Vision and key goals with CSRA EOA, Inc. Board and Policy Council

This stage includes consensus building among the CSRA EOA, Inc. Board and Policy Council members to discover a shared strategic vision that:

- is clearly stated
- is compelling
- is timely
- describes a clear and present need
- motivates people to act
- is a worthwhile challenge

Stage 2. Research and Validation – Review Community Needs Assessment data and Annual Programmatic reports as needed in preparation for strategic planning.

This stage should produce the substantive documentation and solutions needed for validation of discovered vision and key goals and inform the strategic planning process.

Stage 3. Identify strategic goals and draft the strategic plan

After the discovery and research phases, stage 3 entails the identification of key strategic goals and the development of an actionable strategic plan that will serve as the overall blueprint for our work. This plan should include:

- An executive summary
- A comprehensive, detailed plan that identifies:
 - Shared vision
 - Goals
 - Objectives
 - Strategies
 - Tactics
 - Responsible partners and their roles
 - Measures
 - Outcomes
- This plan should also include:
 - Resource development strategies
 - Initial communications strategies (What are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)

Stage 4. Development of implementation recommendations

This stage includes the development of recommendations regarding the implementation phase of CSRA EOA Inc.'s work. Included within this phase should be a detailed budget to implement the plan and methods of measuring successful implementation.

6. Ownership and Confidentiality

All intellectual property will become the property of CSRA EOA, Inc. All data remains the sole property of the organizations. The vendor shall further agree to keep information related to any and all contracts with CSRA EOA, Inc. in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with us.

7. Proposal Format

To best evaluate the ability of the vendor to meet our goals, please include the following in your proposal:

- A brief explanation of your approach to strategic planning
- A summary of strategic planning experience with a list of some similar projects completed
- Three client references
- Suggested project timeline with major tasks and milestones
- Project budget stage (Stages 1 – 4)
- Identify who will be involved on your project team, their role, and include their relevant experience.

Proposal – Must include the following:

General Information

CSRA EOA, Inc. understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in the project. If a consultant group or partnership of consultants, the proposal should indicate who will serve as the point person.

Consultant Qualifications and Roles

The proposal must describe the consultant's qualifications to conduct the RFP scope of work activities, expertise, knowledge, and experience. Experience should include examples of conducting similar or related work (i.e., working with other collaborative or collective impact initiatives to create a strategic vision and strategic plan), as well as experience working with non-profits, smaller trade associations, rural and small-metro communities, and regional development organizations.

To accomplish the scope requested, the consultant will need to possess the following

qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process
- Knowledge of marketing, communications and branding
- Knowledge of resource development
- Ability to constructively challenge key stakeholders
- Experience inspiring others to think innovatively
- Project management experience

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:

- the specific activities to be conducted at each stage,
- a timeline for the activities at each stage,
- milestones and deliverables tied to those activities, and
- a detailed budget for each task, along with a proposed payment schedule tied to project milestones and/or deliverables.

References

The proposal should include at least three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number and email address.

8. Scoring

Proposals will be reviewed and evaluated based on the following criteria:

- Qualifications
 - Consultant has the qualifications necessary to successfully complete the

- scope of work
 - The consultant has prior experience working on similar projects
 - The consultant has prior experience working with similar organizations
- Scope of Proposal
 - The proposal demonstrates an understanding of the project objectives and desired results. The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan
 - The proposal illustrates the consultant's ability to successfully execute the proposed approach
 - The proposal includes an appropriate process to interact with committee members
- Work Plan
 - The proposal adequately details project activities and milestones, or deliverables associated with each stage of the scope of work
 - The proposal includes a detailed timeline for each stage
 - The work can be completed within a reasonable project timeline
- Budget
 - The proposal includes a detailed budget for the scope of work
 - Proposed costs are reasonable

9. Process for Proposal Submission and Evaluation

Instructions for submission

a) Closing Submission Date

Proposals are due by 5:00 PM Eastern on Monday, May 23, 2022.

b) Inquiries

Inquiries concerning this RFP should be directed via email to Sharon DuBose, PMP, CCAP at sedubose@csraeo.org. All questions should be submitted

c) Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by CSRA EOA, Inc.

d) Submission Instructions

Proposals should be submitted in PDF format via email to sedubose@csraeo.org before the closing submission date. If the file is too large for email, a link to the file should be provided.

Late arrivals will not be accepted. Mailed submissions will not be accepted.

It is the responsibility of the bidder to ensure that the response is received by CSRA EOA, Inc. by the closing submission date. A response may be judged nonresponsive

and excluded for further consideration if it is not received by the deadline or does not follow the specified format.

e) Right to Reject

CSRA EOA, Inc. reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

f) Small Businesses, Minority-Owned Firms, and Women's Enterprises

CSRA EOA, Inc. will make efforts to utilize small businesses, women's business enterprises, and/or minority-owned firms. A bidder qualifies if it meets the definition established by the Small Business Administration.

g) Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, that must be indicated in the relevant section(s) of the response.

h) Notification of Selection and Timeline

It is expected that a bidder will be selected within two to three weeks of the closing submission date, although this timeline is subject to change. CSRA EOA, Inc. reserves the right to cancel this RFP at any time. Upon conclusion of negotiations with the successful bidder, all bidders submitting responses to this RFP will be informed in writing of the name of the successful firm or individual.

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i) Criteria for Selection

CSRA EOA, Inc. will select the proposal which it feels will deliver the highest quality deliverable at the best value. The Executive Director and Planner/Evaluation will conduct initial review of proposals for completeness. An executive committee will review, rate, and rank proposals. This committee will be comprised of agency Department Heads, key program staff, and the chair or appointed representative of the Evaluation and Planning Committee. Results will be submitted to the Executive Director for final selection.

Price will be a significant, but not the only, criteria in evaluating the proposals.

Consideration will also be given to the following:

- Ability of the bidder to provide all aspects of the proposal.
- Compliance of the vendor and proposal with the project requirements outlined above.
- The extent to which the proposed deliverable meets the scope and goals

outlined in the RFP.

- Experience with similar organizations and portfolio of work.

The award will be made to the qualified bidder whose proposal is most advantageous to CSRA EOA, Inc. with price and other factors considered.

CSRA EOA, Inc., in its sole discretion, may request proposal presentations by meeting with any or all bidders to clarify or negotiate modifications to proposals. However, CSRA EOA, Inc. 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 bidder can propose.

CSRA EOA, Inc. contemplates award of the contract to the responsible Bidder with the most cost-effective solution and the capabilities to perform the contract services.

j) Conflict of Interest

The Bidder must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the Contract or the services provided under the Contract. Except as otherwise disclosed in the proposal, the Bidder affirms that to the best of its knowledge there exists no actual or potential conflict between the Bidder, the Bidder's project manager(s) or its family's business or financial interests ("Interests") and the services provided under the Contract. In the event of any change in either Interests or the services provided under the Contract, the Bidder will inform CSRA EOA, Inc. regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to the CSRA EOA, Inc.'s satisfaction or the Bidder may be disqualified from consideration under this RFP. As used in this Section, "conflict of interest" shall include, but not be limited to, the following:

1. Giving or offering a gratuity, kickback, money, gift, or anything of value to a CSRA EOA, Inc. official, officer, or employee with the intent of receiving a contract from CSRA EOA, Inc. or favorable treatment under a contract;
2. Having or acquiring at any point during the RFP process or during the term of the Contract, any contractual, financial, business or other interest, direct or indirect, that would conflict in any manner or degree with Bidder's performance of its duties and responsibilities to CSRA EOA, Inc. under the Contract or otherwise create the appearance of impropriety with respect to the award or performance of the Contract;
or
3. Currently in possession of or accepting during the RFP process or the term of the Contract anything of value based on an understanding that the actions of the Bidder or its affiliates or Interests on behalf of CSRA EOA, Inc. will be influenced.