



Request for Proposals for Strategic Planning Consultants

PURPOSE

Southern Arizona AIDS Foundation (SAAF) has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute a strategic planning process with our stakeholder community to inform a three-year strategic plan.

WHO IS ELIGIBLE TO RESPOND?

SAAF seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, have strong facilitation skills and have proven experience with nonprofit strategic planning. Diverse businesses owned by people of color, women, persons with disabilities, LGBTQ+, veterans and other underrepresented businesses are encouraged to apply. Experience in working with and demonstrated support for LGBTQ+ organizations preferred.

ABOUT THE ORGANIZATION

The mission of SAAF is to cultivate a healthy and stigma-free society through transformative action. In 2015, SAAF celebrated 30 years of providing services and continues to be the only community-based organization in Southern Arizona providing case management and ancillary support services for people living with HIV/AIDS and their families; culturally appropriate prevention and education programs to reduce the rate of infection; and LGBTQ+ community outreach and engagement.

SCOPE OF WORK & DELIVERABLES

We expect the project to include:

1. Project Management and Facilitation
2. Design & execution of a strategic planning process that meets the criteria outlined in this RFP
3. Development of a three-year strategic plan (FY22-FY25)
4. Development and recommendation of a support structure for plan implementation and evaluation

The proposal should include:

1. A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project



2. Qualifications of all consulting staff who will be assisting with the project such as education, position within consulting firm, years & type of experience.

3. Time and Cost projections

4. Any experience with including a Diversity, Equity and Inclusion lens in strategic planning work

PROJECT GOALS AND TARGET AUDIENCE

SAAF envisions the scope of work to be completed in three stages. Work completed in each of the stages will be summarized in a report to the Board of Directors and CEO. SAAF is anticipating beginning the work in November 2020 with completion no later than May 2021.

1. Stage 1- Pre-Planning

This stage requires the consultant to research and report the following in preparation for the strategic planning session. Items to be considered:

- Review of organization's history and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities or concern
- Interviews, surveys & focus group polling to receive stakeholder, partner & community input

2. Stage 2- Strategic Planning Creation

At this stage, the consultant helps the nonprofit identify strategic goals and create an actionable strategic plan. The plan will include: • An executive summary • A comprehensive plan that identifies:

- Shared Mission and Vision and Core Values
- SMART (specific, measurable, achievable, realistic, and time-limited) Goals
- Objectives
- Strategies
- Outcomes
- Measurables

Optional items to the plan would include

- Resource Development strategies
- Recommendations for enhancement of current financial, technological, and human capital.
- Communication strategies



OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of the nonprofit organization receiving services. All data remains the sole property of the nonprofit organization. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

PROPOSAL FORMAT

Please include the following information in your proposal: • Your approach to strategic planning • A summary of your strategic planning experience, including any work in Diversity, Equity and Inclusion • Identify specific nonprofit sectors in which you have conducted strategic planning • Three Client references • Sample project timeline with major tasks and milestones • Detailed project budget • Sample project plan • Identification of those on your team who will be involved with the project which should include their role and experience.

The proposal must also include the following specific information:

General information- The proposal should provide the name of the consultant, title, address, phone number, email address, and website, if one exists. The name and email address for any team members assisting in the project should also be included.

Consultant Qualifications & Roles- The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related nonprofit work. Some key qualifications that will be considered: • Education (degree(s) and/or certificate(s)) • Experience in successfully developing strategic plans • Strong facilitation skills • Experience in creating a neutral environment for obtaining input • Experience in gathering and utilizing data to drive the strategic process • Ability to constructively challenge key stakeholders • Experience in inspiring others to thinking innovatively • Project management experience

Plan- The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work. • Specific activities to be conducted at each stage • Sample timeline for the activity at each stage • List of milestones & deliverables tied to the activities • Proposed payment schedule tied to project milestones & deliverables

References- Information regarding each reference should include the individual's name, address, phone number and email address.



Previous Work Product- The proposal should include at least 1 sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for submission

1. Closing Submission Date: Proposals are due by 4:00pm on Monday, October 12, 2020
2. Inquiries: Inquiries concerning this RFP should be directed to Erik Simonson – Executive Assistant, esimonson@saaf.org
3. 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 SAAF.
4. Submission Instructions • All submissions must be submitted electronically to esimonson@saaf.org. Submissions will NOT be returned. Electronic submissions cannot exceed 15 megabytes per email. Multiple emails per RFP submission can and will be accepted. An email acknowledgement of each submission received will be sent to the applicant. All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.
5. Reservation of Rights. SAAF reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. SAAF may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. SAAF reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. SAAF reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of SAAF. It does not commit SAAF to award any contract.
6. Confidentiality. If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.
7. Ineligibility. Under the following conditions, an individual or entity is ineligible to be a vendor, and therefore may not submit a proposal.

Conflict-of-Interest: Any individual or entity that has a conflict-of-interest including SAAF employees and Board members, and their family members

8. Notification of Selection and Timeline: SAAF will utilize a Strategic Planning Task Force. The evaluation process will include individual task force member evaluation and rating of each proposal, followed by task force discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled with



finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists. The final recommendation of the Strategic Planning Task Force will be submitted for approval by the SAAF CEO and Board President and is not subject to appeal. All applicants will receive written notification of SAAF's decision regarding their proposal. Additional information may be required from the selected applicant prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract. SAAF reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need. In the event that no proposal is selected, SAAF may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.

Contact Person: Completed RFP submissions including all elements listed above are due to SAAF by 4:00 p.m. on Monday October 12, 2020. Submissions must be emailed to Erik Simonson, Executive Assistant at esimonson@saaf.org

Timeline:

September 9, 2020 RFP Release Date

October 12, 2020 at 4pm Deadline for receipt of proposals

October 13 -October 27, 2020 Evaluation of proposals by Strategic Planning Task Force, Interviews with highest-ranking applicants, if applicable

October 31, 2020 – Selection of Applicant