



## REQUEST FOR PROPOSALS FROM STRATEGIC PLANNING CONSULTANTS

### PURPOSE

Louisiana Public Health Institute has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute an equitable strategic planning process for the organization to inform a three-year strategic plan to achieve the following goals:

- Refine the language we use to describe who we are and what we do (mission, vision);
- Solidify the way we operate (culture, values), the way we do our work (guiding principles, frameworks), and how we are organized (operational excellence, organizational structure);
- Create a shared internal understanding of who we are, where we are going (strategic goals, growth opportunities); and
- Establish performance indicators and anticipated outcomes that reinforce our accountability to each other, the communities we serve, our stakeholders and funders (performance and success metrics/indicators, outcomes).

### WHO IS ELIGIBLE TO RESPOND?

Louisiana Public Health Institute seeks consultants who demonstrate a strong overall understanding of nonprofit structures with mission-driven activities, have strong facilitation skills, and have proven experience with nonprofit strategic planning. In addition, consultants should have knowledge of the public health, health care and/or related nonprofit landscape with broad reach and programmatic scope. An emphasis and experience with person--centered-practices is highly preferred.

### ABOUT THE ORGANIZATION

The [Louisiana Public Health Institute](#) (LPHI), founded in 1997, is a statewide 501(c)(3) nonprofit and public health institute that translates evidence into strategy to optimize health ecosystems. Our work focuses on uncovering complementary connections across sectors to combine the social, economic, and workforce needed to align action for health. We champion health for people, within systems, and throughout communities because we envision a world where everyone has the opportunity to be healthy and well.

LPHI is an equal opportunity employer with a dedicated and diverse workforce committed to directly impacting racial and health equity in the communities we serve. We have over 65 employees, of which 25% are located outside of the New Orleans area. Our staff support a broad range of public health and research related programs in the areas of policy and advocacy, health and racial equity, community assessment, capacity building and mobilization, clinical quality improvement, patient-centered research and health information exchange. In addition, LPHI offers fiscal sponsorship to non-profits, and human resources support and hiring for local, state and local non-profits. LPHI's current (FY21) annual operating budget is roughly 17 million dollars. Our partners represent a broad range of stakeholders including government, academia, healthcare systems and providers, mental health and social services, community-based organizations, policy makers, business leaders and community advocates. We work together to build community capacity and resilience and to address social, economic, and racial factors that impact health outcomes.

## 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 (July 2021- June 2024) that includes a budget plan for implementation; and
4. Development of a plan to monitor and evaluate the strategic plan's implementation.

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, positions held, years & type of experience.
3. Time and Cost projections.

## PROJECT GOALS AND TARGET AUDIENCE

The strategic planning process is expected to begin late January 2021 and go through September 2021, with an opportunity for extension or expansion of scope.

LPHI has established the core areas that the Strategic Planning process will focus on:

- **Brand Refresh** (Mission, Vision, Tag Line)
- **Guiding Principles and Value Statement** (Equity, Excellence, Cohesiveness, Frameworks and Theory of Change, Guiding Principles for Decision Making)
- **Operational Excellence** (Organizational Structure and Alignment, Relationships and Reporting Structure)
- **Making an Impact** (Metrics / Key Performance Indicators (KPIs) / Success Measures); Power of Storytelling
- **Revenue Growth** (Landscape Analysis, Service Line Growth; Fund Development/Fundraising; Diversification, Stretch (Goals)

LPHI 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 stakeholder community.

### 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, current state in terms of programmatic and funding areas, organizational structure, and core background and defining documents.
- Benchmarking LPHI with other public health institutes, health and capacity building related organizations/consulting groups, and local, state and national organizations/entities with similar missions and priorities.
- Conduct interviews, surveys & focus group polling to receive stakeholder, partner & community input.
- Develop a SWOT analysis of the organization to evaluate opportunities, gaps and/or concerns.

## 2. Stage 2- Strategic Planning Creation

At this stage, the consultant helps LPHI to identify strategic goals and create an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive 3 year Strategic Plan that includes areas such as:
  - Shared Mission and Vision
  - Guiding Principles and Values
  - Goals
  - Strategies and Investments
  - Outcomes
  - Performance Measures
- Recommendations for enhancing current financial, technological, human resources, and organization alignment.
- A Budget Plan\* that represents resource allocations needed to achieve identified goals.

## 3. Stage 3- Implementation & Evaluation Follow-Up

This stage requires the consultant to assist LPHI by providing oversight of the implementation & evaluation process. This process should include:

- Develop monitoring and evaluation plan for strategic planning implementation.
- Follow-up session(s) with LPHI leadership to gauge the progress of the implementation at three (3) month point after plan delivery.
- Support the gathering of any measures that would give indication of successful implementation.

## **OWNERSHIP AND CONFIDENTIALITY**

All intellectual property will become the property of LPHI receiving services. All data remains the sole property of LPHI. 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
- Identify specific nonprofit sectors in which you have conducted strategic planning
- 1-2 success stories (including measures) that demonstrate client's revenue growth and operational excellence as a result of engaging with your organization
- 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, as applicable. 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
- Knowledge of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience in the review and redesign of organizational structures
- Experience gathering input from diverse stakeholders (board members, staff, partners, other key stakeholders)
- 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
- Understanding of organizational development approaches for Diversity, Equity and Inclusion
- Budget planning experience
- Knowledge of statewide nonprofits, public health, state and federal funding.

*Work 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 stakeholder engagement strategies
- Sample timeline for the activity at each stage
- Specific approach for making this an equitable process
- 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.

*Budget -* Anticipated budget is \$15,000

## SCORING

Proposals will be reviewed and evaluated on the following criteria:

- Qualifications (35%)
- Scope of Proposal (25%)
- Work Plan (25%)
- Budget (15%)

## PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for Submission

1. Closing Submission Date Proposals are due by 5:00pm Central Time on Tuesday December 22, 2020.
2. Inquiries concerning this RFP should be directed to Maria Ludwick at [mludwick@lphi.org](mailto:mludwick@lphi.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 LPHI.
4. Submission Instructions:
  - All submissions must be electronically sent to: [rfp@lphi.org](mailto:rfp@lphi.org).
  - 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.
  - Narrative description of project proposal should not exceed 8 pages. Submissions will NOT be returned.

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

LPHI 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. LPHI 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. LPHI reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. LPHI reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of LPHI. It does not commit LPHI to award any grant.

### 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 LPHI vendor, and therefore may not submit a proposal.

- LPHI employees and Board members, and their family members

## 8. Notification of Selection and Timeline

LPHI will seat the RFP Selection Committee. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee 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 RFP Selection Committee will be submitted for approval by the LPHI Chief Executive Officer and is not subject to appeal. All applicants will receive written notification of LPHI'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 shall disqualify the applicant from award of the project and/or contract. LPHI 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, LPHI 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.

### **TIMELINE**

December 8, 2020: RFP release date

December 22, 2020, 5pm CT: Deadline for receipt of proposals

January 6-8, 2020: Review committee convenes

January 14, 2020: Interviews with highest-ranking applicants, if applicable

January 18, 2020: Notice of selection to applicants

February 1, 2021: Potential contract start date

May 1, 2021: Draft Budget Plan available for integration in Annual Operating Budget preparation

June 14, 2021: Present Strategic Plan for LPHI Board of Director approval