



REQUEST FOR PROPOSALS FOR STRATEGIC VISIONING AND PLANNING

PURPOSE

The National Association of Development Organizations (NADO) and the NADO Research Foundation have 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

NADO 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 national membership organizations.

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.

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1. About the Organization

Founded in 1967, **the National Association of Development Organizations (NADO)** provides advocacy, education, research, and training for the nation's regional development organizations. The association and its members promote regional strategies, partnerships, and solutions to strengthen the economic competitiveness and quality of life across America's local communities.

"Regional Development Organization" is used generically to describe the national network of more than 500 multi-jurisdictional regional planning and development organizations. These public-based entities play an invaluable role in fostering intergovernmental collaboration among federal, state and local officials. They deliver and manage various federal and state programs. Most importantly, they work to solve areawide issues and to address the fundamental building blocks required for competitive and sustainable communities and economies.

As a public interest group membership organization, **NADO** is structured to:

- Engage in a coordinated advocacy campaign that brings the RDO voice to the halls of Congress as well as into the offices of federal agencies to make sure the needs of their regions are considered in the federal budget and as policy is developed and implemented.
- Provide in-depth analyses of federal legislation that has a direct bearing upon the ability of RDOs to provide services to communities in their regions.
- Educate members of Congress and their staff about the positive impact of federally-funded programs administered by RDOs in their congressional districts.
- Inform NADO members about key policy and legislative actions that affect their programs and services.

NADO Research Foundation is the 501(c)(3) nonprofit affiliate of NADO. The Research Foundation provides professional development training, research and peer networking services. The Research Foundation examines new and innovative practices in regional development, strives to improve the organizational and professional capacity of regional development organizations and their partners, and bridges the communications gaps between policy makers, practitioners, and the public.

More information on the organizations is available at www.nado.org.

2. Project Overview

NADO is governed by a Board of Directors (65 directors) representing six regions from across the country. The Board is led by an Executive Committee (6 officers) who provide policy direction and work closely with the Executive Director to oversee implementation. The NADO Executive Committee members also serve as the Board of Directors for the NADO Research Foundation.

NADO currently employs seven full-time staff members (two of which are remote), a financial consultant, and a meetings/events consultant. Staffing levels fluctuate based on funding.

Since 2013, NADO and the NADO Research Foundation have experienced significant changes to the organizational structure of both entities including the hiring of a new executive director, board member turnover, staff reductions, fluctuating resources from federal government and foundations, and increased engagement from organization leadership.

To help capitalize on these changes, NADO and the NADO Research Foundation are looking for a consultant to create a strategic plan through a comprehensive and participatory process.

3. 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 is not able to sub-contract out any of the work without the pre-approval of the sub-contractor by NADO.

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

- Background research by consultant on NADO and NADO Research Foundation history and current leadership team, including environmental scan of organization and opportunities ahead.
- Benchmarking our organizations with other similar sized non-profits or additional organizations with similar focus.
- 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
 - These meetings may be conducted in conjunction with our scheduled meetings in La Jolla, CA (June 2-4, 2018) and Charlotte, NC (October 13, 2018), but may also be done virtually in some situations. If unable to utilize the June 2-4, 2018 dates, please outline an alternate time schedule.

4. Project Goals and Target Audience

While NADO seeks the consultant's recommendations regarding the best process to develop an actionable strategic plan, the organization envisions the scope of work being completed in stages.

Stage 1. Discovery - Vision and key goals with NADO Board

This stage includes consensus building among the NADO Board 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 - Needs assessment, gap analysis, SWOT analysis, research, etc.

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 write the strategic plan, including detailed budget

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 NADO's work. Included within this phase should be a detailed budget to implement the plan and methods of measuring successful implementation.

5. Ownership and Confidentiality

All intellectual property will become the property of NADO and the NADO Research Foundation. All data remains the sole property of the organizations. The vendor shall further agree to keep information related to any and all contracts with NADO and the NADO Research Foundation 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.

6. Proposal Format

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

- Examples of similar projects
- Your approach to strategic planning

- A summary of strategic planning experience
- Three client references
- Suggested project timeline with major tasks and milestones
- Project budget by line item
- Sample project plan
- Identify who will be involved on your project team, their role, and including their relevant experience.

Proposal – Must include the following:

General Information

NADO and the NADO Research Foundation understand 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 budgeting
- 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.

Previous Work Product

The proposal should include at least two examples of written work similar to the scope of work requested within this RFP (e.g., strategic plan).

7. 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 each stage of the scope of work
 - Proposed costs are reasonable

8. Process for Proposal Submission and Evaluation

Instructions for submission

a) Closing Submission Date

Proposals are due by 5:00 PM Eastern on Thursday, April 26, 2018.

b) Inquiries

Inquiries concerning this RFP should be directed to Joe McKinney (contact information below) no later than Friday, April 20, 2018.

Joe McKinney, Executive Director
 jmckinney@nado.org

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 NADO and the NADO Research Foundation.

d) Submission Instructions

Proposals should be submitted in PDF format via email to jmckinney@nado.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. Mail submissions will not be accepted.

It is the responsibility of the bidder to ensure that the response is received by NADO 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

NADO 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

NADO 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. NADO 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.

RFP Released: March 23, 2018

Proposals due: April 26, 2018

Vendor selection made: May 4, 2018

Project begins: May 2018

i) Criteria for Selection

NADOO will select the proposal which it feels will deliver the highest quality deliverable at the best value. Proposals will be initially reviewed by the Executive Director. Selection of vendor will be made by the Executive Committee with input from the Executive Director.

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 NADO and the NADO Research Foundation with price and other factors considered.

NADO, in its sole discretion, may request proposal presentations by meeting with any or all bidders to clarify or negotiate modifications to proposals. However, NADO 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.

NADO 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 NADO regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to the NADO'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 NADO or NADO Research Foundation official, officer, or employee with the intent of receiving a contract from NADO 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 NADO 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 NADO will be influenced.