

Strategic Planning Consultation – Request for Proposals

Community Action Marin will soon embark on a new strategic planning process to map out our path into a vibrant future guided by our core values of relationship, inclusion, service, and unity. We seek an experienced strategic planning consultant to design and lead an inclusive, participatory, and transformative strategic planning process with the goal of advancing racial and economic equity in response to community need.

AGENCY BACKGROUND

Community Action Marin (CAM) is committed to racial and economic equity and driven by our vision that all of us in Marin have an equal opportunity to live our lives with dignity and respect. We make it possible for people to achieve well-being by providing the education, mental health, and vital services they need. Together, we break down the barriers that get in the way of fair and lasting change in service to better outcomes for all. Our work reaches over 20,000 people each year and we are the largest nonprofit human services provider in Marin County, California. CAM currently has over 225 employees and an annual operating budget of \$20 million. Our [2020 Impact Report](#) highlights some of the meaningful outcomes and collective power of our work this past year.

Since our last strategic planning process in 2017, there has been significant change underway at CAM. We welcomed a new CEO two-and-a-half years ago and have added strength to our board and staff leadership. CAM has been successful in growing its donor base and securing unrestricted gifts that have allowed the agency to be nimble and responsive. In the face of unprecedented need brought on by the pandemic, CAM expanded and adapted services. The agency is also pursuing a developmental approach to becoming a fully trauma-informed and vibrant place to work.

We have created cross-agency teams to work at all levels of the organization to align in advancing organizational goals. CAM has already made strides to advance pay equity internally and is committed to this ongoing effort as a priority. There have been noteworthy investments in our operational capacity to sustain the work into the future. The agency has significantly grown its visibility in community and taken an active role in leading systemic change on issues of equity and justice in partnership with allied organizations. CAM is eager to build on these successes and chart a future direction through a new strategic planning process that centers the people and communities we serve.

CAM has outlined a concrete goal of growing and developing over the next decade to better meet the community needs of today and anticipate the needs of tomorrow. By 2030 CAM is seeking to increase its budget to \$25 million and diversify its funding base.

PROJECT DESCRIPTION AND EXPECTATIONS

The desired outcome of this planning process is a comprehensive, 5-year strategic plan for CAM that focuses on equity, reflects the needs of the community, and is data driven. CAM has a budget maximum of \$30,000 for this effort and will determine the total project expenditure in alignment with the final scope and planning activities chosen.

The following are key components/deliverables that we expect to include in the planning effort. Consultants may include additional components in their proposed scope of work.

- Assessment of external landscape – Utilize existing agency data and conduct further assessment to identify community need, presence of other services in community, and relevant opportunities, to inform future direction and new initiatives
- Client and community input – Design and facilitate input gathering from the populations and communities CAM serves, including English and Spanish-speaking clients and those representing our current programs, as well as staff, funders, donors, and community partners
- Agency engagement – Collaborate with CAM staff and board to create meaningful cross-agency engagement in the planning process
- Assessment of organizational capacity – Leverage board and staff input to assess internal capacity and utilize to inform strategic priorities
- Strategic map – Organize and facilitate planning sessions with a focus on agency vision, guiding values, competitive advantage, and produce a strategic map with goals for the next 5 years
- Implementation recommendations – Offer suggestions on strategies for implementation and evaluation of the strategic plan to be utilized by CAM staff

CONSULTANT QUALIFICATIONS

We are looking for consultants with the following expertise, skills, experience and approach to successfully deliver project outcomes:

- Experience leading strategic planning efforts with community based human services agencies and agencies of similar size and complexity
- Demonstrated success designing and managing planning efforts centered on equity
- Expertise facilitating inclusive and collaborative processes with diverse stakeholders, including agency clients, partners, staff and Board members
- Experience designing and implementing data collection efforts (surveys, focus groups) with diverse audiences, including those who may have limited literacy, diverse cultural backgrounds
- Relevant experience working with groups in a virtual environment

PROPOSAL FORMAT AND INSTRUCTIONS

Please provide a complete written proposal to this RFP not to exceed 10 pages. Proposals should detail the following information:

1. Executive Summary – Overview of your proposal, highlights of key components
2. Consultant Approach – Description of your general approach to strategic planning consultation, including guiding perspective or philosophy, methodologies used, how you assess effectiveness and impact of your work, what you expect from your clients
3. Proposed Scope of Work – Description of project deliverables, associated activities, and timeline, including clarity on consultant vs. agency roles and responsibilities
4. Proposed Budget – Outline of project costs aligned with proposed scope of work
5. Consultant Qualifications – Description of your specific expertise to successfully deliver on this project and contact information for all personnel to be involved with the project, including name, associated firm (as applicable), website, email address, phone number
6. References – Provide a minimum of three (3) references for which you have provided services similar to those described in this RFP. References shall include entity name, contact person name, title, address, email address, and date of project

7. Attachments – Provide samples of past strategic plans you have led, resumes of all proposed personnel, and/or letters of commitment if you are proposing to subcontract or establish a formal collaboration. Attachments do not count toward the total page limit.

Submit completed proposals, no later than March 1, 2021, to Gina Guillemette at gguillemette@camarin.org.

PROPOSAL REVIEW AND SELECTION

Applications will be screened initially by CAM staff, followed by a working group staff and board members who will review and score all finalists using a standardized scoring instrument. The scoring instrument will reflect the requirements of the RFP to determine which applicants demonstrate the skills, expertise, and experience needed to successfully perform the tasks specified in the RFP. As part of this review process, the working group may choose to conduct interviews with one or more applicants and/or request additional information. The working group will make a recommendation to the CAM Board who will make the final selection of the consultant. All applicants will be notified in writing of a decision no later than March 31, 2021.