



## **Request for Proposal**

### ***Strategic Planning Services***

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#### **INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:**

Name: Lori Johnson  
Title: President  
Entity: EightCAP, Inc.  
Address: 5827 Orleans Rd  
Orleans, MI 48865-8603  
Phone: (616) 236-1037  
Fax: (616) 754-9310  
Email: [lorij@8cap.org](mailto:lorij@8cap.org)

# **I. GENERAL INFORMATION**

## **A. Purpose**

EightCAP, Inc. (EightCAP) is seeking proposals from consultants experienced in facilitating inclusive strategic plans for non-profit organizations, specifically Community Action Agencies funded by the Community Service Block Grant (CSBG). This plan will shape EightCAP's direction from 2025 to 2029, establishing strategic priorities and operational goals to benefit the central Michigan counties of Gratiot, Ionia, Isabella, and Montcalm.

## **B. Instructions on Proposal Submission**

### **1. Closing Submission Date**

Proposals must be submitted no later than 4:00 p.m. on Wednesday, April 30, 2024.

### **2. Inquiries**

Inquiries concerning this RFP should be directed to Lori Johnson at (616) 236-1037 or [lorij@8cap.org](mailto:lorij@8cap.org).

### **3. Conditions of Proposal**

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Offeror and will not be reimbursed by EightCAP.

### **4. Instructions to Prospective Contractors**

Your proposal may be submitted by mail or email to:

Name: Lori Johnson  
Title: President  
Entity: EightCAP, Inc.  
Address: 5827 Orleans Rd  
Orleans, MI 48865-8603  
Fax: (616) 754-9310  
Email: [lorij@8cap.org](mailto:lorij@8cap.org)

It is the responsibility of the Offeror to ensure that the proposal is received by EightCAP by the date and time specified above. Late proposals will not be considered.

### **5. Right to Reject**

EightCAP reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based upon the factors described in this RFP.

6. Small Businesses, Minority Owned Businesses, Women Owned Businesses, and Labor Surplus Area Firms

Efforts will be made by EightCAP to utilize small businesses, minority and women owned businesses, and labor surplus area firms.

An Offeror qualifies as a small business firm if it meets the definition of “small business” as established by the Small Business Administration (13 CFR 121.201).

See Department of Labor website ([www.dol.gov](http://www.dol.gov)) for a current listing of labor surplus areas.

7. Notification of Award

A decision on the successful consultant will be made within four weeks of the proposal submission deadline. All Offerors will be informed in writing via email.

**C. Description of Strategic Planning Services and Project Deliverables**

EightCAP, governed by a 15-member tripartite board, has a rich history dating back to its incorporation in 1966. Designated as a community action agency, EightCAP secures federal, state, and private funding to implement a wide array of anti-poverty programs. With a grants portfolio exceeding \$19 million spread across more than 45 grants, EightCAP collaborates with numerous community agencies to fulfill its mission of combating poverty and enhancing community well-being.

As per the Community Services Block Grant (CSBG) Organizational Standards, EightCAP is mandated to maintain an agency-wide strategic plan approved by its governing board every five years. The most recent strategic plan, approved in January 2021, serves as a roadmap for the organization's initiatives and priorities.

The current strategic planning initiative seeks to develop a comprehensive organizational strategic plan that tackles key objectives such as poverty reduction, community revitalization, and empowerment of individuals with low incomes towards self-sufficiency. The plan must encompass goals at the family, agency, and community levels, integrating insights from the community needs assessment to ensure relevance and effectiveness.

For more information about EightCAP and to access the current strategic plan, please visit [www.8cap.org](http://www.8cap.org).

The selected consultant will be expected to:

1. Strategic Planning Process Design

Develop a detailed and customized strategic planning process that includes a clear timeline, milestones, and logistics for engaging stakeholders.

2. Stakeholder Engagement Plan

Create an engagement plan that outlines how diverse stakeholders, including staff, board members, community partners, and individuals with low incomes, will be involved in the strategic planning process. This plan should include methods such as surveys, interviews, focus groups, and community listening sessions.

3. Community Needs Assessment Integration

Integrate data and insights from the community needs assessment into the strategic plan to ensure that goals and strategies are aligned with the identified needs of the community.

4. Facilitated Strategic Planning Sessions

Conduct facilitated strategic planning sessions with the strategic planning team, which includes agency leadership, staff, board members, and community representatives. Ensure that at least one session is conducted in person, with the option for other sessions to be completed virtually.

5. Development of Strategic Plan Document

Create a visually engaging and comprehensive strategic plan document that includes an executive summary, detailed plan with strategic priorities, action steps, key performance indicators (KPIs), and a clear implementation roadmap.

6. Presentation to Governing Board

Present a summary of the final strategic plan to the EightCAP Governing Board at a meeting, either in person or virtually, upon completion of the plan. The presentation should effectively communicate the key elements of the plan and garner support from board members.

**Approximate Project Timeline:**

RFP Released	April 1, 2024
Proposals Due	April 22, 2024
Hiring Date:	May 15, 2024
Proposed start of project:	June 1, 2024
1 <sup>st</sup> Draft of Strategic Plan:	September 30, 2024
Expected Board Approval:	November 22, 2024

**D. Price**

Offerors should provide a detailed breakdown of proposed fees.

**E. References**

Offerors should provide references relevant to EightCAP’s work or examples of completed strategic plans.

**F. Payment**

Payment is contingent upon satisfactory completion of work. Progress payments may be considered based on satisfactory progress.

**II. PROPOSAL EVALUATION**

**A. Nonresponsive Proposals**

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received timely in accordance with the terms of this RFP.
2. The proposal does not provide a price.

**B. Evaluation**

Evaluation of each proposal will be based on the following criteria:

<b>Factor</b>	<b>Point Range</b>
Prior experience developing strategic plans for community action agencies	0-20
Prior experience developing strategic plans for nonprofit organizations	0-10
ROMA Certified Implementer or Trainer involved in production of strategic plan	0-5
Minority/Woman/Small/Labor Surplus area business	0-5
Price	0-20
<b>Total Points</b>	<b>60</b>

**C. Review Process**

EightCAP may, at its discretion, request presentations by or meetings with any or all Offerors, to clarify or negotiate modifications to the Offerors’ proposals.

However, EightCAP 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, which the Offeror can propose.

EightCAP anticipates award of the contract to the responsible Offeror with the highest total points.