



Wateree Community Actions, Inc.

Request for Proposals: Strategic Planning Services

Summary of Essential Information

Wateree Community Actions, Inc. (WCAI) seeks a consultant to support the development of a five-year organizational strategic plan.

- Hiring date: As selected and approved by the WCAI Board of Directors by **February 29, 2024**.
- Proposed beginning of work: As selected and approved by the WCAI Board of Directors by **March 29, 2024**.
- Approximate completion date: By **June 30, 2024**
- Respond to: Annette Tucker (atucker@wcai.org)/Margaret Gibson (mgibson@wcai.org)

Organizational Overview and Key Considerations

WCAI was officially formed in July 1970 when the Sumter County and Kershaw County community action agencies merged. Subsequently, the newly formed agency grew with the merging of three other existing community action agencies: Lee County (Williamsburg-Lee), Clarendon County (Clarendon County Commission), and Richland County (Midlands Human Resource Commission). The merging process spanned from July 1970 until April 1988. The largest of five, the Sumter County Economic Opportunity Corporation, formed in 1967, was the lead corporation.

Thus, the agency is now a private, nonprofit agency serving the counties of Clarendon, Kershaw, Lee, Richland, and Sumter. The Community Service Block Grant (CSBG) Act provides the agency its designation as a Community Action Agency. This Act, as amended, outlines the requirements of the agency's governing structure as a tripartite board of directors. WCAI has a 15- member governing board that includes 3 seats for each county to include a representative of each county's public, private, and poor sectors.

Process and Project Deliverables

The strategic planning consultant will work with a steering committee of board members, agency management, and frontline staff to research and write a five-year strategic plan for 2024-2028.

The process of developing the plan should include:

- Gathering and analyzing quantitative data, including data on WCAI's inputs, outputs, and outcomes, from WCAI and other sources;
- A thorough scan of WCAI's operating environment, including gathering and analyzing information – through document review, interviews, focus groups, and surveys – from WCAI staff and board members; clients and members of client communities; service providers and other community partners; and other external sources;
- Engaging WCAI staff in the strategic planning process; and
- Facilitating steering committee meetings, focus groups, and other appropriate convenings.

The final plan should:

- articulate WCAI’s mission, vision, and messaging/value proposition/brand positioning relative to key audiences;
- A full SWOT analysis;
- Include input from agency staff, board members, and other stakeholders;
- Include clear and prioritized five-year organizational goals and objectives, including both organizational development goals and program goals;
- Include an agency theory of change;
- Fit well within the ROMA NexGen and new national community action performance measurement framework set out in partnership between DHHS OCS, NASCSP, and NCAP;
- Incorporate all other agency programs and services, including Head Start and Early Head Start and their performance standards, Weatherization, CSBG, and LIHEAP grants.
- Articulate a detailed set of strategies that WCAI should pursue to achieve its goals and objectives;
- Identify priority outcomes and other metrics that will allow WCAI to allocate limited resources and measure progress;
- Include an action plan for implementation, with a timetable and benchmarks;
- Include a framework for annual monitoring and reevaluation of progress under the plan;
- Align closely with WCAI’ projected available resources;
- Be written as an outward-facing document that WCAI can share, in whole or in part, with funders and other stakeholders.

Proposal Format

Please try to be as concise as possible in responding to this RFP. Responses should not exceed 10 single-spaced pages, not counting attachments, and must be emailed to mgibson@wcai.org.

Proposals should adhere to this format:

1. Introduction and executive summary of no more than 1 single-spaced page.
2. Describe your proposed approach to facilitating strategic planning and generating the requested deliverables. Please be sure to speak to the following issues/questions, which need not be addressed in this order or using these headings:
 - a. *Data*. WCAI wants both the planning process and the plan itself to be informed by data. The plan should articulate priority outcomes and metrics for evaluating success, and the planning process will benefit from an expert analysis of key data on WCAI’s inputs, outputs, and outcomes. Concerning one or two specific examples of past projects, please discuss your approach to using data in the strategic planning process and developing success metrics as part of strategic plans.
 - b. *Feasibility*. WCAI needs a plan that it can afford to implement. Please describe your approach to ensuring that the finished product will map onto WCAI’s reasonably-foreseeable budget and include activities to recruit the resources needed to implement the plan.
 - c. *Implementation*. WCAI is looking for a plan that is immediately useful and conducive to implementation. Please explain how you will generate a product that WCAI can implement.
 - d. *Engagement*. WCAI’s staff is one of its greatest assets, and staff input and buy-in will

be critical to the success of this effort. Please explain how you will engage staff throughout the process.

- e. *Brand Positioning.* WCAI wants to emerge from the strategic planning process with a stronger understanding of its value to a range of key audiences. Please explain how your strategic planning process will help WCAI to clarify its mission, vision, and value proposition.
 - f. *Collaboration.* WCAI intends to hire a strategic planning consultant simultaneously with a design and communications consultant, who will assist WCAI in rebranding, beginning shortly after the strategic planning process is completed. We will ask the two consulting firms to communicate so that the discovery and information-gathering portion of the strategic planning process can be leveraged to significantly inform – and, ideally, shorten – the discovery portion of the rebranding process. Please indicate any experience that you have in similar scenarios, reflect on any concerns that you might have about the envisioned process, and discuss how you might collaborate with the design consultant.
3. Proposed project schedule.
 4. Cost proposal, including a breakdown of costs.
 5. Brief consultant profile with a focus on relevant experience.
 6. Attachments:
 - a. Three references. We would appreciate references whose work or needs appear relevant to WCAI’s work and proposed project if possible.
 - b. Three examples of completed strategic plans. We would appreciate plans relevant to WCAI’s work and proposed project if possible.
 - c. Biographies of key project personnel.

Evaluation Process and Timeline

This RFP will be released on February 6, 2024. Proposals are due by 5:00 pm EST on February 23, 2024. Before February 20, 2024 we will respond via email and phone to any questions about the RFP (mgibson@wcai.org 803-712-4712). We will review proposals, conduct interviews, and select a final vendor by February 29, 2024.

Terms and Conditions

1. Work for Hire: All deliverables will be owned by WCAI, its successors, and assigns.
2. Costs of Preparing Responses: WCAI will not pay any vendor costs for preparing responses to this RFP.
3. Responses Property of WCAI: Materials submitted in response to this RFP will not be returned.
4. RFP Amendments/Cancellation/Reissue/Reopen: WCAI reserves the right to change the RFP schedule or issue amendments to this RFP at any time. WCAI also reserves the right to cancel or reissue the RFP.
5. No Obligation to Enter a Contract:
 - a. The release of this RFP does not compel WCAI to enter into any contract.
 - b. WCAI reserves the right to refrain from contracting with any vendor that has responded to this RFP, whether or not the vendor's response has been evaluated, and whether or not the vendor has been determined to be qualified.

Exercise of this reserved right does not affect WCAI's right to contract with any other vendor.

- c. WCAI reserves the right to request an interview with any vendor and a demonstration from any vendor before entering a contract with that vendor. If a vendor declines the request for an interview or demonstration, the vendor may be eliminated from further consideration.
6. Multiple Contracts: WCAI reserves the right to enter contracts with more than one vendor due to this RFP.
7. Non-Endorsement: The selection of a vendor under this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to WCAI in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of WCAI.