



# Request for Proposals

## Strategic Planning

JANUARY 2019

### **ISSUED BY**

PATH Coalition of KY

### **REPRESENTATIVE**

Carrie Bohnert, MPA, CHSE

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## About the Organization

People Against Trafficking Humans (PATH) Coalition of Kentucky is a non-profit 501(c)(3) organization actively working to combat human trafficking occurring in Kentucky and across the world. PATH's mission involves two goals:

- (1) To provide education to the community with the intent to increase awareness related to the occurrence of human trafficking; and
- (2) To provide support services and safe and secure housing options to survivors of human trafficking.

Since its inception in October 2015, PATH has established a board of directors and employs one staff person responsible for assisting with the development of programming for the organization.

In 2018, we honed and delivered our education sessions, held a public prayer and vigil service during Derby Week, and hosted a board retreat during which we confirmed our need for guidance in strategic planning.

PATH Coalition of KY  
900 S. Shelby St.  
Louisville, KY 40203

## **Project Overview**

PATH is seeking a consultant to work with PATH on the creation of a three-year strategic plan through a comprehensive, data-driven, and participatory process. We hope to complete the strategic planning process within six to nine months. The candidate selected may be extended the opportunity to consult on a capital campaign upon conclusion of the strategic planning process.

The consultant should possess the following qualifications:

- Experience successfully developing consensus-based strategic plans
- Strong facilitation and conflict management skills
- Experience soliciting input from stakeholders
- Experience using data to inform the strategic planning process
- Knowledge of budgeting
- Knowledge of marketing, communications, and branding
- Experience inspiring others to think innovatively
- Project management experience

## **Scope of Work and Deliverables**

We expect that the project will include the following:

- Project management
- Design and execution of a strategic visioning and comprehensive planning process
- Development of an actionable three-year strategic plan, including a projected budget for implementation
- Development of recommendations regarding the plan's implementation and support structure

It is expected that these tasks will be accomplished through activities including:

- Background research by consultant on PATH history and current leadership team,
- Background research on the scope of anti-human trafficking activities in the Louisville area

- Benchmarking PATH with other similar sized non-profits or additional organizations with similar focus
- Focus groups, interviews, surveys and/or other appropriate methods of gathering input from partners and community members
- Facilitated group meetings with board, staff and partners to create consensus regarding a strategic vision and plan
  - These meetings will typically be conducted during standing board meetings, on the second Monday of the month from 11:30 am - 1:00 pm at PATH headquarters.
- Review and present available data and partner strategic plans as well as any relevant research and best-practices relating to the work PATH accomplishes

While price is a significant factor, other criteria will form the basis of our award decision, as more fully described in the Evaluation Factors section of this Request for Proposal below.

## **Project Goals & Target Audience**

While PATH 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. The consultant will serve as the facilitator of this process, with leadership from the PATH board.

### **1. Mission, Vision and Key Goals with PATH Board**

- Consensus-building among PATH board members
- Discovery of a shared strategic vision that is clearly stated, compelling, and timely. The vision should:
  - Describe a clear and present need
  - Motivate people to act
  - Be a worthwhile challenge
  - Be bold

### **2. Research and Validation - Needs assessment, gap analysis, SWOT analysis, research, etc.**

### 3. Development of the Strategic Plan

To include

- Executive summary
- Mission statement
- Vision
- 3-5 Strategic goals
  - Objectives
  - Strategies/tactics
  - Outcome measures
- Detailed budget with fund development recommendations

### 4. Implementation strategies

- Initial communication strategies
- Infrastructure needed to support implementation

## Proposal Format

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

- Evidence of experience
- Your approach to strategic planning
- A summary of strategic planning experience
- Client references
- Suggested project timeline with major tasks and milestones
- Project budget with proposed payment schedule

Proposal must include the following

- Name, title, mailing address, phone number, and email address for each partner consultant to be engaged under your contract. If multiple partners will contribute, please name a point person.
- References for at least three individuals who can speak to their experience with the consultant in conducting projects of similar scope
- At least two examples of written work similar to the scope of work requested within this RFP

If a consultant group or partnership of consultants is proposed to conduct the 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.

## Scoring Proposals

Proposals will be reviewed and evaluated based on the following criteria:

Qualifications	15	Consultant has the qualifications necessary to successfully complete the scope of work.
	10	Consultant has prior experience working on similar projects.
	10	Consultant has prior experience working with similar organizations.
Scope of Proposal	10	The proposal demonstrates an understanding of the project objectives and desired results.
	10	The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan.
	10	The proposal illustrates the consultants ability to successfully execute the proposed approach.
Work Plan	10	The proposal adequately details project activities and milestones or deliverables associated with each stage of the scope of work.
	10	The proposal includes a reasonable, detailed timeline for each stage.
Consultant Fees	15	The proposal includes a detailed consultant fees for each stage of the scope of work. Proposed costs are reasonable.

# Submitting Proposals

Proposals are due by 5:00 p.m. Eastern on Friday, February 8, 2019. PDF copies of all related files should be submitted in a single email to [PATHLouisvilleRFP@gmail.com](mailto:PATHLouisvilleRFP@gmail.com).

Inquiries concerning this RFP should be directed to Carrie Bohnert, board chair, at (502) 386-3274.

**Costs** All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by PATH.

**File Format** Proposals should be submitted in PDF format via email to [PATHLouisvilleRFP@gmail.com](mailto:PATHLouisvilleRFP@gmail.com) before the closing submission date. If the file is too large for email, a link to the file should be provided. Mail submissions will not be accepted.

**Deadline** Proposals are due by 5:00 p.m. Eastern on Friday, February 8, 2019. Late arrivals will not be accepted. It is the responsibility of the bidder to ensure that the response is received by PATH by the closing submission date.

**Right to Reject** PATH reserves the right to reject any and all responses received in response to this RFP. A response may be judged non-responsive and excluded from consideration if it is not received by the deadline or does not follow the specified format.

**Notification**  
PATH It is expected that a bidder will be recommended for hire to the board on February 11, 2019, although this timeline is subject to change. Upon conclusion of negotiations with the successful bidder, all bidders submitting responses to this RFP will be informed by email.

**Right to Cancel** PATH reserves the right to cancel this RFP at any time.

**Conflicts 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. In the event of any change in interests, the bidder will inform PATH. All conflicts shall be resolved to PATH's satisfaction.