

Pittsburgh Community Services, Inc.

REQUEST FOR PROPOSALS for Facilitation of Strategic Planning Process

Issued: December 21, 2022
Deadline for Submission of Proposals: January 30, 2023

1. Introduction

Pittsburgh Community Services, Inc. (PCSI) is seeking proposals from qualified consulting firms to facilitate the development of its strategic plan. The strategic planning process will result in a comprehensive three-year plan that will outline goals and objectives that will guide priorities based on considerable research, extensive input from a variety of stakeholders, and consensus on the vision and mission of the organization.

2. Background & Purpose

Pittsburgh Community Services, Inc. (PCSI) was established in 1983 as the designated Community Action Agency (CAA) for the city of Pittsburgh, Pennsylvania, and has served as the anti-poverty agency for the city for over 30 years. PCSI serves approximately 6,000 individuals annually.

PCSI is recognized as the innovative Community Action leader in reducing the impact of poverty in Pittsburgh through direct service, advocacy, mobilization of resources, sustainable economic empowerment, and effective institutional change.

PCSI offers the following programs:

- Case Management
- Anti-Hunger Initiatives
- Training & Workforce Development
- Work Ready
- Housing Services

The purpose of this Request for Proposals (RFP) is to invite prospective bidders to submit a proposal to facilitate the strategic planning process, and to work closely with the PCSI Strategic Planning Committee (SPC) to develop and disseminate a new strategic plan for 2024-2026.

The strategic planning process will be under the direction of the SPC, as approved by the PCSI Board of Directors. Consultations and information gathering will be done in conjunction with the SPC and key staff members of PCSI.

2. Scope of Work and Proposal Submission Requirements

The strategic planning process will be closely coordinated with and guided by the SPC. The SPC envisions a highly engaged consulting role that is deeply involved in gathering, processing, and summarizing the information generated by various consultation and participation processes. The planning process should be conducted in a manner that listens intently to stakeholders.

PCSI envisions a thorough strategic planning process that builds community and provides shared direction for our organization. The Strategic Planning process should:

- a. Undertake a re-articulation of PCSI's Mission and Vision.
- b. Conceptualize a more focused PCSI within revenue projections.
- c. Develop agreed frameworks, directions, and strategies for Key Issue Areas.
- d. Articulate approaches that would lead to more focused and high-impact programs.

- e. Suggest organizational management and governance structures that will enable implementation of the plan.
- f. Ensure ongoing monitoring to measure plan progress and make adjustments based on changing conditions.

The Plan itself should remain at a strategic level, providing clarity on general program directions and internal goals, while avoiding engagement with detailed work plans or program descriptions, which will be the responsibility of staff and specific governance groups during implementation.

The following schedule applies to this RFP, but may change in accordance with PCSI's needs or unforeseen circumstances:

Issuance of RFP – December 21, 2022

Technical Questions/Inquiries Due – January 16, 2023

Proposals Due – January 30, 2023

Interviews with Finalists – Week of February 6, 2023

Selected Consultant Notified – Week of February 13, 2023

All proposals must be received by January 30, 2023. Proposals received after this deadline will not be considered. A transmittal letter and proposal should be sent to pamelaw@pghcsi.org. The proposal itself should be no more than six (6) pages in length and should address the complete scope of work and deliverables. Work samples, including examples of strategic plans and other relevant information, may be submitted as links or as appendices. Proposals should include the following sections:

a. Consultant Background

State the name of the organization and describe the general nature of its work and specifically name the lead consultant who will be conducting the work. Describe the education, skills, and experiences that uniquely qualify the lead consultant and his/her team for this work. Proposals must include three examples of related work completed with contact information for the organizations served.

b. Statement of Proposed Work

Describe in succinct terms the methodologies proposed to complete the strategic planning process including:

- The approach to partnership and team-building. How would your organization build and maintain an engaged relationship with the key stakeholders in the strategic planning process?
- Ideas and methods for data gathering and information dissemination appropriate for PCSI.
- Ways to ensure cross-fertilization of ideas and feedback loops between the various stakeholders.
- Ideas or examples of how to present and promote the finalized plan.

c. Workplan

Describe the workplan, or provide a sample workplan, for the strategic planning process, including key milestones, timetable for completion of specific tasks, the resources needed to complete tasks, and expectations for support and assistance from PCSI. The work plan should include regular consultation with the SPC, beginning with an initial meeting to

present the strategic plan design and make any necessary adjustments. Proposals may also include other activities deemed necessary by the consultant and specified within the work plan.

d. Budget and Deliverables

Provide a detailed budget including a description of the specific deliverables that will be submitted, the time line (with dates for completion of individual planning stages), and expected schedule of compensation. Deliverables are expected to include:

- Finalization of the work plan with the SPC.
- Redraft of the Mission and Vision of PCSI, based on internal and external scanning.
- Draft frames, directions, and strategies for key issue areas.
- Facilitation of stakeholder interviews, surveys, and focus groups.
- A Strategic Plan with 3-5 high level goals.

e. Additional Information and Comments

Include any other information deemed important, but not specifically required elsewhere.

3. Proposal Evaluation Criteria

The evaluation of each response will be based on demonstrated competence, compliance, format, and organization:

1. Approach, thoroughness, and completeness of the proposal (30%)
2. References and past performance with similar organizations (30%)
3. Expertise in participatory processes, including details on key personnel (20%)
4. Price (20%)

The consultant should demonstrate:

- Experience with organizations of similar or comparable scale.
- Skill at facilitation of inclusive and participatory team processes.
- Clarity in writing and presentation of information.
- Experience with organizational development, organizational management, and change management.
- Skill at designing processes for facilitation of focus groups.
- Skill at survey design and processing.

4. Inquiries

Questions that help clarify the work to be completed can be submitted to pamelaw@pghcsi.org.