

REQUEST FOR PROPOSAL: STRATEGIC PLANNING

July 21, 2020

MOBILE TREE COMISSION

Mr. Jesse McDaniel, Chair
(251) 580-9511
MCDANJL@GMAIL.COM

1. Background:

The Mobile Tree Commission (MTC), a quasi-governmental organization created by the state legislature in the 1960s to protect and promote public trees, is in need of strategic planning services and is accepting proposals in response to this request in order to find a qualified source to facilitate the development of a strategic plan. Goals of the strategic plan will be to:

- A. Assess the current direction and resources of the MTC.
- B. Gain a consensus understanding of MTC expectations and concerns.
- C. Identify MTC goals and strategies to achieve them.
- D. Develop a written plan for the MTC to follow as a guide.
- E. Give a brief overview of the strategic plan at a public meeting of the MTC.

The objective of this Request for Proposal is to locate a source that will provide the best overall value to MTC. 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.

2. Submission Guidelines & Requirements

- A. First and foremost, only qualified individuals or firms with prior experience on projects such as this should submit proposals in response to this Request for Proposal.
- B. Bidders intent on submitting a proposal should so notify the representative identified on the cover page no later than August 7, 2020.
- C. Bidders must list at least two (2) projects that are substantially similar to this project as part of their response, including references for each.
- D. A technical proposal must be provided that is not more than two (2) pages. This technical proposal should provide a proposed schedule and milestones, as applicable.
- E. A price proposal must be provided that is not more than one (1) page. This price proposal should indicate the overall fixed price for the whole project as well as hourly rates and an

estimated total number of hours, should MTC decide to award a contract on an hourly rate basis.

- F. Proposals must be signed by a representative that is authorized to commit bidder's company.
- G. If you have a standard set of terms and conditions, please submit them with your proposal. All terms and conditions will be subject to negotiation.
- H. Proposals must be received prior to August 11, 2020 at 4:30pm to be considered.
- I. Proposals must remain valid for a period of 60 days.

3. Project Description

In order to improve its service to the public, the MTC wishes to develop a strategic plan. Substantive planning and debate will be very beneficial for the MTC to develop a team consensus and chart its way forward. Since the MTC is composed of all volunteers who are laypeople not skilled in strategic planning, the members want to secure the assistance of a professional. The MTC wants to further refine its goals, challenges, and tactics. A strategic plan will also give MTC members a roadmap to follow in future discussions about the allocation of resources.

4. Project Scope

The scope of the project entails: reviewing pertinent MTC documents, consulting with the MTC representative to select day/time/venue for MTC planning session, gauging individual MTC member priorities and concerns, facilitating an in-person planning session, generating a written report and presenting it at a public meeting. These criteria should be met to achieve successful completion of the project:

- A. MTC members have given meaningful input about the direction of the organization.
- B. Both a short- and long-term plan of action based on consensus.
- C. Compile relevant information into a report.
- D. Identify actionable goals for MTC committees.
- E. Presentation of the strategic plan at a public meeting of the MTC.

Acceptance of the work is contingent on the following acceptance criteria:

- A. Two equal payments will be made for services: one upon execution of an agreement and one upon delivery of the final report to MTC.
- B. Must supply all needed materials and/or technology.
- C. Must be able to travel up to 60 miles for planning session.
- D. MTC will have final approval of date/time/location of planning session.
- E. MTC will make all arrangements for planning session venue and dietary needs.
- F. Fifteen (15) hard copies of the final report are requested for the public during the presentation at a future MTC meeting.

5. Timeline

The Request for Proposal timeline is as follows:

- A. Request for Proposal Issuance: July 21, 2020
- B. Notification of Intent: by 4:30 pm on August 7, 2020
- C. Proposal submission: by 4:30 pm on August 11, 2020
- D. Selection of Top Bidder/Notification to Unsuccessful Bidders: August 18, 2020

The need-date for project completion is October 31, 2020. Bidders may propose a date earlier or later, and will be evaluated accordingly.

6. Budget

MTC is budgeting for a proposal that will cost \$3,000 or less.

7. Evaluation Factors

All proposals will be evaluated, and a selection will be made and approved by the MTC. Minority firms and women business enterprises are encouraged to submit proposals. MTC will rate proposals based on the following factors:

- A. Cost of proposal (value)
- B. Responsiveness to the above requirements
- C. Relevant past performance/experience
- D. Samples of work in strategic planning