

Allegan County Community Mental Health Services

INVITATION TO BID: **Strategic Plan Facilitation Services**

Issued: Wednesday, September 20, 2017

Introduction

Allegan County Community Mental Health Services (Allegan CMH) is seeking interested vendors for a competitive bid(s) to provide Strategic Plan Facilitation services over the next several months. Strategic Plan Facilitation services includes planning, organizing/arranging, facilitating, and documenting all aspects of the development of Allegan CMH's strategic plan, conducting such meetings with internal and external stakeholders as may be needed per the plan developed by the vendor, and representing the product of this work before the Board of Allegan CMH and other such audiences as may be necessary for a plan to be adopted.

Allegan CMH is the public manager of mental health services under contract with the State of Michigan for the delivery of services related to the use of General Funds. Allegan CMH receives all components of Medicaid funds from the Lakeshore Regional Entity, the region Prepaid Inpatient Health Plan (PIHP) for adults and children with serious mental illness emotional disorders, intellectual/developmental disabilities, and/or substance abuse disorders.

Strategic Planning Objectives

Allegan CMH wishes to have a comprehensive strategic plan to provide direction for the agency for the next three to five years. The vendor will guide Allegan CMH Board members and agency staff through a planning process that will result in a Board-approved strategic plan. The bidder is requested to propose a process that meets (a) the needs of the organization for long-range planning and (b) the accreditation standards for Allegan CMH.

Duties, Tasks, Milestones and Deliverables

The vendor should expect to work closely with and facilitate an Allegan CMH strategic planning team, comprised of designated Board Members and executive management. From beginning design of a comprehensive planning process, to the engagement of key stakeholders and the incorporation/review of key/critical community data reflecting needs, the bidder is expected to provide Allegan CMH with a comprehensive, well organized and documented, long-range strategic planning product that can be used with minimal external assistance for several years following the completion of the process. Examples of the kinds of activities that may be considered include, but are not limited to:

1. Preparation Efforts – A session/retreat with the Allegan CMH Board and administration for orientation to the proposed process and refinement of the plan based on input provided.

2. Needs Assessment – Accumulation and organized comprehensive review of relevant and existing data from the agency and community resources; modest engagement of additional data gathering as appropriate to assure comprehensive community and stakeholder voice.
3. Exploration of Mission/Vision/Values – Refreshing and refining of the agency’s mission, vision, values in light of the agency’s contractual obligations, emerging responsibilities and opportunities, and community needs (among other variables).
4. Agency Strengths/Needs/Opportunities Analysis – Inventory of agency assets and liabilities relative to the agency’s current or future mission and vision, and with consideration of the opportunities for increased effectiveness.
5. Action Plan – Development of an organized plan for initial and future strategic action, with specific recommended measurements and benchmarks.
6. Project Status Reports – Written and/or verbal reports to the board at intervals that are appropriate to the proposed plan on progress, barriers, timeline factors, need for specific coordination, etc.
7. Final Report – Completion of the engagement through delivery and acceptance of a final comprehensive report:
 - a. Documentation of the process used by the vendor/board/agency
 - b. Compilation of data relevant to the process: analysis, findings, stakeholder recommendations, interview summaries, key conclusions/decision points, etc.
 - c. Materials the board and administration may use for ongoing development of Allegan CMHs strategic plan

Freedom of Information Act/Open Meetings Act

Bidders are hereby notified that all information contained in their proposal and subsequent work may be subject to the provisions of the Michigan Freedom of Information Act. In addition, any meetings connected to this bid process which meet the requirements of the Open Meetings Act will be open to the public.

Rejection or Selection of Proposals

Allegan CMH may reject any or all proposals or any portion thereof, advertise for new proposals, proceed to do the work otherwise, abandon the work, or award in whole or in part a contract deemed to be in the best interests of Allegan CMH.

Vendors will be held to the terms submitted in their proposals but may be required to reduce costs depending upon aspects of the proposed project that may be determined by Allegan CMH to be unnecessary.

As a part of the evaluation process, on-site interviews and/or presentations may be requested by Allegan CMH. All bidders may not be invited to participate in this aspect of the proposal review process. Bidders will be invited to participate at the sole discretion of Allegan CMH.

Bidders who are not selected for a vendor contract will be notified in writing. The acceptance of a proposal will not diminish the right of Allegan CMH to negotiate specific contract terms, including price, with the successful bidder.

Reservations

Allegan CMH reserves the right to:

- a. Discontinue or cancel the RFP process, in whole or in part, at any time for any or no reason. The issuance of an RFP, a bidder's preparation and submission of a proposal, and Allegan CMH's subsequent receipt and evaluation of such proposal does not commit Allegan CMH to award funding or to award a contract to the bidder or any other individual or entity, even if all the requirements in the RFP are met.
- b. Consider an otherwise disqualified proposal, if no other proposals are received.
- c. Disqualify a proposal based on the information provided or if it is determined that a Bidder purposely or willfully submitted false information in response to the RFP.
- d. Reject any or all bids which fail to meet the terms, conditions and specifications of the RFP package; or, are determined to not be in Allegan CMH's best interests; or, for which funding is not available.
- e. Accept other than the lowest bid.
- f. Consider a bidder's prior performance with Allegan CMH in making its award decision.
- g. Consider overall economic impact to Allegan CMH when evaluating proposal pricing and in the final award recommendation.
- h. Refuse to award a contract to any bidder that has any outstanding debt with Allegan CMH.
- i. Enter into negotiations with one or more bidders on price, terms, technical requirements, or other deliverables.
- j. Evaluate the proposal outside the scope identified in the RFP.
- k. Seek additional proposals beyond submission deadline if, in its sole discretion, proposals received do not meet the guidelines or intent of this RFP or the needs of Allegan CMH and/or the population it serves.

Provider/Bidder Qualifications

The successful bidder will have demonstrated experience facilitating meetings, creating and conducting interviews, writing reports and other steps necessary for strategic planning for nonprofit and/or governmental social service (or similar) organizations. The bidder will demonstrate high level skills in tailoring interview questions to a variety of audiences, while simultaneously creating a cohesive plan to ensure that all questions elicit useful information. It is desirable that vendors have proven experience, knowledge, and expertise in the services provided by Michigan Community Mental Health (CMH) agencies in general.

Proposal Submission Requirements

All proposals must be concise and well-organized, and demonstrate how the bidder's proposed services, approach and methodology, qualifications, experience, and terms meet or exceed Allegan CMH's requirements as expressed in this RFP.

Bidders should include the following information in their proposals, which will be weighted for consensus scoring in the following proportions:

Identification of Organization/Affirmation (0% - not scored)

1. Full legal name and address of the bidding entity. Name and contact information of the bidder's representative/contact person, including mailing address, telephone number and email address. Please confirm that the submission of this bid represents an affirmation of the bidder's ability to provide the services or functions outlined in the RFP.

Overall Quality of Bid Proposal (40%)

2. What are the unique capabilities/qualifications/experiences of person(s) who will provide direct services to Allegan CMH? Attach resumes of all individuals who will be involved in the provision of services as a part of this proposal.
3. Describe the project as you would propose it over time; what are the key elements or deliverables that will be provided to produce a successful strategic plan that is ready for board approval on June 19, 2018? Given that target date, what timetable would you initially propose for this work?
4. Please describe any primary or substantial services or supports for this effort that you would need to be provided by Allegan CMH during the course of the contract engagement.

Prior/Comparable Experience (30%)

5. Provide a brief overview of services you provide; number of years of experience providing strategic planning leadership, consultation, or related activities. Do you have any known conflicts of interest that exist or would be perceived to exist by board members, staff, community members or persons served?
6. Identify the organizations (and types) for which you have provided strategic planning leadership, consultation, or related activities and the nature of those engagements. Specify if you have specific experience working with Michigan Community Mental Health agencies or similar organizations.

Price (20%)

7. Identify the costs you would propose for the completion of the activities identified in your response to item 3 above ("Describe the project as you would propose it over time..."). Provide justification for the reasonableness of the costs relative to the value provided and its contribution to the success of Allegan CMH's strategic planning efforts. Please present the cost quote as a not-to-exceed amount for work required to complete the required strategic plan.

8. Please provide contact information and any available letters of recommendation for all organizations for whom you have provided strategic planning consultation services within the last three years. Submission of a bid will be understood as an authorization by the bidder to permit Allegan County CMH to contact any or all listed organizations for a reference.

Note: Price quotes should include estimated number of hours and standard hourly rate associated to complete all objectives and presentations. Pricing must be itemized and include a written explanation of all fees and cost, including travel and incidental costs. Though it will not be part of the bid scoring process, the bidder must propose a payment schedule which corresponds to the work plan and schedule work provided. Allegan CMH will finalize a payment schedule during the contract negotiations process with the winning bidder.

RFP/Project Timeline

The timeline for the bid decision and initiation of project work is identified in the table below. The bidder should propose a plan which assumes the completion of all deliverables within this timeline.

Date	Action or Event
September 19, 2017	Board approves release of RFP
September 20, 2017	RFP issued – posted on website, actively distributed via MACMHB contacts, direct solicitation, etc.
September 29, 2017	9:00 am – Bidder’s conference at Allegan County CMH Services, 3283-122nd Ave, Allegan, MI 49010 in the County Services Building. <i>Attendance is not required in order to submit a bid. All questions and their responses will be posted on the Allegan County CMH website (www.accmhs.org) as soon as possible, and no later than 3:00 pm on Friday, October 20, 2017)</i>
October 11, 2017	5:00 pm – Deadline for questions from prospective bidders
October 20, 2017	3:00 pm – Final answers from prospective bidders posted to Allegan CMH website
October 27, 2017	12:00 pm (noon) – Deadline for receipt of four (4) copies of complete proposals in office of Allegan CMH
October 27 to November 9, 2017	Evaluation and scoring of proposals, communication of results/scores to those who submitted bids.
November 10, 2017	Recommendation to the board for approval of contract recommendation
November 21, 2017	Board approval for negotiation of a contract

(table/timeline continues on the next page)

November 22 to December 15, 2017	Contract negotiation and execution
December 16, 2017 to June 18, 2018	Initiation/execution of strategic planning project activities
June 19, 2018	Board approval of new strategic plan
June 20 to July 31, 2018	Strategic planning project activities completed/wrapup

Contract

If this RFP results in an award, the Allegan CMH contract will consist of this Invitation to Bid (and written amendments), the Bidder's proposal (and written amendments to the Bidder's proposal, if any and as authorized). It will also include any materials incorporated by reference in the above documents and any purchase order and change orders issued under the Contract.

If there are conflicting provisions between the documents that make up the Contract, the order of preference for the documents is as follows:

- a. This Invitation to Bid, as amended;
- b. The documents and materials incorporated by reference in the Invitation to Bid;
- c. The Bidder's proposal, as amended; and
- d. The documents and material incorporated by reference in the Bidder's proposal.

Cost Reporting and Presentation

It is the intent of Allegan CMH to negotiate a contract with the bidder whose proposal represents the overall best value to the agency; i.e., the most advantageous mixture of price, quality, value and performance. Bidders must bear all costs incurred in preparing bid proposals. Contract awards will not include budgeted elements intended to recoup or reimburse for costs of developing bid proposals.

Proposal Scoring Methodology

Proposals will be evaluated and scored by consensus by a team of board and agency staff reviewers in the following broad areas of consideration as outlined above:

1. Overall Quality of Bid Proposal (40%)
2. Prior/Comparable Experience (30%)
3. Price (20%)
4. References (10%)

Contact Information and Bid Mailing Instructions

Questions requesting clarification of bid packet information must be received in writing by email or letter by Wednesday, October 11, 2017 at 5:00 pm EDT. Please direct questions to:

Gary M. Smith
 Director of Administrative Services
 Allegan County CMH Services
 3283-122nd Ave, PO Box 130
 Allegan, MI 49010
gsmith@accmhs.org

All questions and their responses will be posted on the Allegan County CMH website (www.accmhs.org) as soon as possible, and no later than 3:00 pm on Friday, October 20, 2017)

Bidders must submit a signed original along with 4 (four) paper copies of their formal bid documents by 12:00 pm (noon) on Friday, October 27, 2017 to:

Gary M. Smith
Director of Administrative Services
Allegan County CMH Services
3283-122nd Ave, PO Box 130
Allegan, MI 49010

CARF Accreditation Standards for Strategic Planning (2017)

1. The ongoing strategic planning of the organization considers:

- a. Expectations of persons served
- b. Expectations of other stakeholders
- c. The competitive environment
- d. Financial opportunities
- e. Financial threats
- f. The organization's capabilities
- g. Service area needs
- h. Demographics of the service area
- i. The organization's relationships with external stakeholders
- j. The regulatory environment
- k. The legislative environment
- l. The use of technology to support:
 - i. efficient operations
 - ii. effective service delivery
 - iii. performance improvement
- m. Information from the analysis of performance

2. A strategic plan:

- a. Is developed with input from:
 - i. Persons served
 - ii. Personnel
 - iii. Other stakeholders
- b. Reflects the organization's financial position:
 - i. At the time the plan is written
 - ii. At projected points in the future
 - iii. With respect to allocating resources necessary to support accomplishment of the plan
- c. Sets:
 - i. Goals
 - ii. Priorities
- d. Is implemented
- e. Is reviewed at least annually for relevance
- f. Is updated as needed

3. The strategic plan is shared, as relevant to the needs of the specific group, with:

- a. Persons served
- b. Personnel
- c. Other stakeholders