



Request for Proposals

Strategic Planning: Facilitator and Planner

Issue Date: May 8, 2023

Submission Deadline: June 9, 2023

604 High Tech Drive | Georgetown, TX 78626 | (512) 763-1400 | www.owbc-tx.org





Background

Opportunities for Williamson & Burnet Counties

Our Story

Opportunities for Williamson & Burnet Counties (OWBC) was established in 1965 as the area's official Community Action Agency. We are a private, 501(c)(3) non-profit corporation governed by elected officials, community leaders and target area representatives. Throughout our history, we have administered a wide range of social services and economic opportunity programs.

Who We Serve

OWBC serves thousands of individuals and families annually in Williamson and Burnet Counties, providing critical services to community members in need. Our programs meet the needs of community members through all stages of life, ranging from children to senior citizens. In collaboration with other nonprofits and organizations, OWBC is able to blanket the community with the resources they need.

Programs

Our agency provides two income-based programs. These include Head Start and Community Services. In addition, we offer a Meals on Wheels program for seniors in need. Although many of our seniors are low-income, this is not a program requirement.

Mission

To empower children, families, and seniors to achieve and maintain independence by partnering with area organizations to provide education, nutrition, and community support.

Vision

A healthy, educated community in which all people live independently and with dignity.

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Project Overview

The goal of this project is to draft a 5-year strategic plan, including goals, action plan, timelines, and resources.

Consultant as Facilitator:

The consultant facilitates the strategic planning process and completes the work by providing a general structure, templates and tools, and project management. The consultant will be fully responsible for the environmental scan and drafting the final product.

Consultant as Planner:

The consultant conducts the environmental scan, prepares for the board retreat, and writes the plan following the board retreat. The Consultant as Planner model must engage the organization's leadership sufficiently for them to have ownership of the plan's success.

Scope of Work

We expect the Principal Investigator (PI) and his/her team to work collaboratively with OWBC Community Services staff and board members. Our staff and board will provide critical information related to history and context, assist in connections with key stakeholders, and can offer logistical guidance and support in the planning process.

Responsibilities and Deliverables of the PI:

1. Create timeline and framework for planning
2. Facilitate work group meetings before and after the retreat
3. Provide project management, including reminders about deadlines
4. Provide templates for all necessary tools for strategic planning (and modify the templates with group feedback)
5. Provide advice and research on sector- accepted best practices
6. Facilitate work group as it conducts environmental scan and analyzes results
7. Analyze metrics of board performance
8. Provide template for environmental scan presentation to the board
9. Facilitate board retreat
10. Provide template for final strategic plan document
11. Provide feedback on final document to the board
12. Written report summarizing engagement deliverables, with suggestions for additional opportunities to strengthen the organization
13. Interview board members as part of the environmental scan and board analysis (instead of the work group)

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14. Draft the initial report on environmental scan, recommendations, and priorities in preparation for the Board retreat (instead of the work group)
15. Draft a revenue plan to support strategic plan implementation (instead of the work group)
16. Draft strategic plan, including goals, action plan, timelines, and resources for work group review and feedback (instead of the work group)
17. Facilitate strategic plan “deep dive” with board prior to approval

*Plus travel expenses if the organization is not within a one-hour drive of Georgetown

Preferred Timeline

June 14-21, 2023 - Interview finalists

July 14, 2023 - OWBC will select a PI for this project

August-October – Strategic Planning

October 31, 2023 - Final Plan Due

November 13, 2023 - In-person presentation of final report delivered to OWBC staff

November 27, 2023 - In-person presentation of progress to the board of directors

How to Submit a Proposal

Interested parties should submit the following, no later than 12pm Central Time on Monday, June 9, 2023, to Marco Cruz, Executive Director, at macruz@owbc-tx.org. Final selection of the PI and his/her team will be made by July 14, 2023. If there are questions, please contact Marco at macruz@owbc-tx.org or 512/763-1400.

1. A project Work Plan specifying how you would carry out the scope of work – including a statement of theoretical perspective and the methodologies you propose for gathering community input – as well as a detailed timeframe for completion of each phase of the project. Please identify the name of the PI and other researchers who will do the work, and their respective responsibilities.
2. Resumes of all researchers who would be involved in the project.
3. An itemized budget with justification, which includes estimates of fees and expenses to be charged by deliverable, including the hourly rate proposed for this work and whether the rate varies by staff or is a blended rate.
4. Brief description of relevant experience in performing similar projects.
5. Brief description of experience collaborating with other organizations on past projects.
6. An example of a similar deliverable produced for another client.

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7. At least three references for projects completed within the last 5 years. Each reference should describe the project, dates of work, outcomes achieved, and a client reference that includes name, title, email, and phone contact.

Response Format

All proposals must be formatted as follows:

- Organized according to the list above
- Page numbered with the respondent's name on each page
- Formatted for 8.5 x 11-inch paper
- 12-point font and no less than 10 point for any graphics or tables
- 10 pages or less, excluding resumes, work product examples, and references
- Submitted as a single PDF file

Review and Selection

OWBC staff will be responsible for proposal review and selection. The selection process is expected to be complete by July 14, 2023.

In the spirit of equity, inclusion, and respect, we welcome all qualified applicants regardless of race, color, disability, national origin, disability status, veteran status and other characteristics protected by law.

Cost of Services

The cost of services will be determined by the final accepted Work Plan and budget. The contract resulting from this RFP will be structured to pay based on the deliverables outlined within this document.

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