



## **REQUEST FOR PROPOSALS**

### **NON-PROFIT STRATEGIC PLANNING CONSULTANTS**

#### **PURPOSE:**

The Coral Gables Chamber of Commerce (CGCC) has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute a strategic planning process with our membership to inform a five-year strategic plan.

#### **ELIGIBILITY:**

The Coral Gables Chamber of Commerce seeks consultants who demonstrate a strong overall understanding of the structure and purpose of non-profit organizations (especially those that are membership-based), have strong information gathering and facilitation skills and have proven experience with non-profit strategic planning. In addition, consultants should have knowledge of the Chamber of Commerce world, along with membership-based organizations. An emphasis and experience in engagement with person centered practices is highly preferred.

#### **ABOUT THE ORGANIZATION:**

Founded in 1925 by Coral Gables visionary George E. Merrick, the Coral Gables Chamber of Commerce is comprised of businesses and leading professionals whose goals are to expand the local economy and advocate for a robust business climate.

To facilitate our mission, the Chamber hosts a variety of networking events each month, creating an opportunity and platform for business leaders to come together, connect and strengthen their working relationships. And, after 96 years, we are proud to be the #2 ranked Chamber in the tri-county area based on our membership size, annual budget, and organizational assets.

#### **OUR MISSION:**

The Coral Gables Chamber of Commerce's primary mission is to advance business success and member engagement in Coral Gables and beyond through our commitment to inclusiveness, relevancy and integrity.

#### **SCOPE OF WORK & DELIVERABLES:**

We expect the Strategic Planning project to include:

- Project Management and Facilitation

- Design & execution of a strategic planning process that meets the criteria outlined in this RFP
- Development of a five-year strategic plan (2022 - 2027) that includes an annual budget for implementation
- Development and execution of a support structure for plan implementation.

The proposal should include:

- A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project
- Qualifications of all consulting staff who will be assisting with the project such as: education, position within consulting firm, years and type of experience
- Time and Cost Projections

### **PROJECT GOALS AND TARGET AUDIENCE:**

The CGCC envisions the scope of work to be completed in three stages. Work completed in each of the stages will be summarized in a report to the Board of Directors and stakeholder community.

- Stage 1- Pre-Planning: This stage requires the consultant to research and report the following in preparation for the strategic planning session.

Items to be considered:

- Review of organization's history and overall assessment through SWOT analysis of the organization to evaluate opportunities or concerns
- Benchmarking our non-profit in alignment with peer Chambers of Commerce
- Interviews, surveys and focus groups to receive member, partner and community stakeholder input

- Stage 2- Strategic Planning Creation: At this stage, the consultant helps the CGCC identify strategic goals and create an actionable strategic plan.

The plan will include:

- An executive summary
- A comprehensive plan that identifies:
  - Shared Mission and Vision ➤ SMART (specific, measurable, achievable, realistic, and time-limited) Goals ➤ Objectives ➤ Strategies ➤ Tactics ➤ Listing of responsible parties & roles ➤ Outcomes ➤ Measurables
- Optional items to the plan would include
  - Resource Development strategies ➤ Recommendations for enhancement of current financial, technological, and human capital ➤ Communication strategies

- Stage 3- Implementation & Evaluation follow-up: This stage requires the consultant to assist the CGCC by providing oversight of the implementation and evaluation process. This process should include:

- Follow-up sessions with nonprofit leadership to gauge the progress of the implementation at three (3) and six (6)-month points after plan delivery
- Gathering of any measurables that would give indication of successful implementation

**BUDGET:**

The Chamber Board of Directors has allocated \$10,000 in the budget for this project.

**OWNERSHIP AND CONFIDENTIALITY:**

All intellectual property will become the property of the CGCC. All data remains the sole property of the CGCC. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

**PROPOSAL FORMAT:**

Please include the following information in your proposal:

- Your approach to strategic planning
- A summary of your strategic planning experience
- Identify specific non-profit sectors in which you have conducted strategic planning, including all Chambers of Commerce
- Three (3) Client references
- Sample project timeline with major tasks and milestones
- Detailed project budget
- Sample project plan
- Identification of those on your team who will be involved with the project, which should include their role and experience
- The proposal must also include the following specific information
  - General information- The proposal should provide the name of the consultant, title, address, phone number, email address, and website. The name and email addresses for any team members assisting in the project should also be included.
  - Consultant Qualifications & Roles- The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related non-profit work. Some key qualifications that will be considered:
    - Education - degree(s) and/or certificate(s)
    - Experience in successfully developing strategic plans
    - Knowledge of collective impact or collaborative strategic initiatives
    - Strong facilitation skills
    - Experience in creating a neutral environment for obtaining input
    - Experience in gathering and utilizing data to drive the strategic process

- Ability to constructively challenge key stakeholders
  - Experience in inspiring others to thinking innovatively
  - Project management experience
  - Knowledge of the Chamber of Commerce world
- The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work.
  - Specific activities to be conducted at each stage
  - Sample timeline for the activity at each stage
  - List of milestones & deliverables tied to the activities
  - Proposed payment schedule tied to project milestones & deliverables
- References
  - Information regarding each reference should include the individual's name, address, phone number and email address.
- Previous Work Product- The proposal should include at least one sample of a previously completed strategic plan (preferably with a non-profit or Chamber of Commerce). Portions may be redacted to protect private information as needed.

## **SCORING:**

Proposals will be reviewed and evaluated on the following criteria:

- Qualifications (30%)
- Scope of Proposal (30%)
- Work Plan/Timeline/Delivery (25%)
- Budget (15%)

## **PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION:**

Instructions for submission

- Closing Submission Date
  - **Proposals are due by 4pm on Monday, January 31, 2022**
- Inquiries
  - Inquiries concerning this RFP should be directed to:  
 Mark A. Trowbridge  
 President & CEO  
 Coral Gables Chamber of Commerce  
 201 Alhambra Circle, Suite 100  
 Coral Gables, FL 33134  
[mtrowbridge@coralgableschamber.org](mailto:mtrowbridge@coralgableschamber.org)  
 (305) 446-1657
  - Conditions of Proposal
    - All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by CGCC
    - Submission Instructions

- All submissions must be on white, standard size (8 ½” x 11”) paper, single-sided only.
- Narrative description of project proposal should not exceed eight (8) single sided pages.
- Attachments/Forms must be type written. Include additional pages, as needed.
- Questionnaire must be type written.
- FAX copies will NOT be accepted.
- Do NOT use hardcover binders.
- Submissions will NOT be returned. All submissions must also include an electronic version sent to:  
[mtrowbridge@coralgableschamber.org](mailto:mtrowbridge@coralgableschamber.org)
- An email acknowledgement of each submission received will be sent to the applicant.
- All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.
- Reservation of Rights
  - CGCC reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. CGCC may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need.
  - CGCC reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. CGCC reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of CGCC. It does not commit CGCC to award any grant.
- Confidentiality
  - If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.
- Notification of Selection and Timeline
  - CGCC will seat the RFP Selection Committee. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled

with finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists. The final recommendation of the RFP Selection Committee will be submitted for approval by the CGCC President & CEO and is not subject to appeal. All applicants will receive written notification of CGCC's decision regarding their proposal, and an announcement of the applicant awarded the project will be posted.

- Additional information may be required from the selected applicant prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract. CGCC reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need. In the event that no proposal is selected, CGCC may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.
- Completed RFP submissions, including all elements listed above, are due to **CGCC by 4:00 p.m. on Monday, January 31, 2022.**
  - Submissions may be mailed or delivered to:  
Attn: Mark A. Trowbridge  
President & CEO  
201 Alhambra Circle, Suite 100  
Coral Gables, FL 33134  
305-446-1657  
mtrowbridge@coralgableschamber.org
- Timeline:
  - Monday, December 20, 2021  
RFP Release Date
  - Monday, January 3, 2022  
Technical Questions Submitted
  - Monday, January 31, 2022 at 4pm  
Deadline for receipt of proposals

- Week of February 14 - 18, 2022  
Evaluation of proposals by Selection Committee
- Week of February 28, 2022  
Interviews with highest-ranking applicants hosted, if applicable
- Week of March 14, 2022  
Notice of selection e-mailed to applicants
- Week of March 21, 2022  
Notification of project award posted
- Week of March 28, 2022  
Negotiation of Agreement and Contract Signed
- Week of April 4, 2022  
Project Commences