

# 2024 Farmington Valley Health District Strategic Planning Request for Proposal

The Farmington Valley Health District (FVHD) is the local health department for 10 towns in the Farmington Valley, serving a population of approximately 110,000 residents. Information regarding the District can be found at [www.fvhd.org](http://www.fvhd.org).

## 1.1 Scope

The Farmington Valley Health District (FVHD) is seeking a consultant to support the development of a strategic plan for the health department.

The goal is to engage the staff (15) and the Board of Health (BOH) (17) in the development of a strategic plan that reflects the vision, mission and values of the organization and results in realistic and time framed goals and objectives. This strategic plan will assist in directing initiatives and resources for the next three to five years.

## 1.2 Classification

The contract resulting from this bid proposal will provide a minimum of two facilitated meetings; one with all staff and Board members to conduct a SWOT/SWOC analysis and another with leadership and the BOH resulting in a strategic plan document. FVHD will provide relevant orientation materials including results of staff engagement surveys, Community Health Improvement Plan, budget and staffing. Bidders are required to show experience in providing this type of strategic planning facilitation and production of strategic plan documents as detailed in these specifications.

## 1.3 Applicant Eligibility Requirements

Have the capacity to commence services no later than **August 1<sup>st</sup>**.

Have the proven capacity to facilitate strategic planning sessions and ability to write strategic plans that include clear Goals and SMART Objectives.

## 2.1 Proposal Info

FVHD is requesting proposals from qualified vendors to provide facilitation and plan development services according to the specification requirements herein.

## 2.2 Background

The ultimate goal is to determine how to best serve our community and customers by ensuring that our financial, organizational capacity and internal processes function at optimal levels. These four areas (community, internal process, organizational capacity and financial) are central to a well-rounded strategic plan. FVHD is pursuing Public Health Accreditation Board (PHAB) accreditation and has completed a community health assessment, community health

improvement plan, workforce development plan, and staff engagement survey that will inform this strategic plan. In addition, FVHD has statutorily mandated functions outlined in Section 19a-207a of CT General Statutes that are also central to informing FVHD's strategic plan.

## **2.3 Project Description and Service Requirements**

Selected contractor will participate in planning meeting with strategic planning advisory group (Four BOH members and Four Staff) to review process, timeline and appropriate orientation materials.

FVHD leadership (Director, Assistant Director and Accreditation Coordinator) will provide background materials and orientation to the strategic planning process to staff and the BOH after consultation and review of proposed process with selected contractor.

Selected contractor will facilitate review and refresh of current Mission, Vision and Values.

Selected contractor will engage full BOH and all staff in SWOT/SWOC analysis ensuring consideration of community, internal process, organizational capacity and financial areas. Selected contractor will provide summary of the SWOT/SWOC for purposes of engaging in selection of goals and objectives.

Selected contractor will facilitate discussions with FVHD senior staff (Director, Assistant Director, program coordinators) and strategic planning advisory group to develop strategic objectives and possible key performance indicators based on themes pulled from SWOT/SWOC and supporting documents.

Selected contractor will facilitate a discussion with BOH members and the FVHD leadership team to make suggestions or improvements to draft Strategic Plan.

The selected contractor shall provide a completed strategic plan document that includes all the required elements listed in the PHAB guidance, also provided by FVHD staff.

## **3.1 Submission Information and Instructions**

### **3.1.1 All bids must be submitted electronically:**

Applications must be submitted electronically to [jkertanis@fvhd.org](mailto:jkertanis@fvhd.org)

### **3.1.2 Applications must be received by **June 17<sup>th</sup> at noon EST****

The FVHD, at its sole and absolute discretion, with or without cause, and without liability of any kind to any applicant, reserves the right to accept or reject any and/or all proposals either in whole or in part, waive any informalities or irregularities of any proposals, cancel this request for proposal (RFP) at any time and/or take any action in the best interest of FVHD. FVHD's decision in matters shall be final. FVHD reserves the right to contact an applicant if additional

information is required. Once the expiration date has passed, no proposal may be amended, unless amendment has been requested by FVHD.

### 3.1.3 Proposal Format

The following information must be included in the proposal to be considered:

**3.1.3.1 Bidder Experience:** The offeror must submit an outline of their experience and work history in these services in the past three-five years. (Competency)

**3.1.3.2 Bidder References:** The offeror shall have documented proven successful contract(s) from customer(s) that the offeror supports that are similar in scope, complexity, deliverables and cost to the requirements of this specification. (Past Performance)

**3.1.3.3 Bidder Approach, Process, Timeline and Project Team:** The offeror must include a description of their approach, process and timeline to this strategic engagement as well as the names and relevant biographies of key team members. (Approach)

**3.1.3.4 Cost, Pricing and Structure:** The bidder must clearly define the unit costs associated with each service requirement to include any travel costs. (Pricing)

**3.1.3.5 Availability:** It is desired that the bidder be located in or around the Hartford or Litchfield County area. FVHD's desire is that the facilitated meetings be in person.

### 3.2 Anticipated Timeline

Activity:	Dates:
Publish RFP	June 1st
Deadline for submission of proposal	June 17 <sup>th</sup> 12:00PM
Proposal selection	July 1 <sup>st</sup> , 2024
Contract Term Begins	August 1 <sup>st</sup> , 2024
Contract Term Ends	November 1 <sup>st</sup> , 2024

\* All indicated times are EST.

### 3.3 Proposal Scoring and Criteria

Strategic Plan Facilitation Scoring is as follows:

#### **Competency: (max: 20 points)**

The ability of the bidder to provide qualified personnel to perform the required services as indicated by experience, training and education, or certification. The bidder shall provide the resumes, curriculum vitae, or other documentation describing the expertise and qualifications of the persons who the bidder will assign to this project. Knowledge of local health departments is preferred.

#### **Past Performance: (max: 25 points)**

The bidder must demonstrate successful completion of similar projects with other public entities and similar target audiences. The bidder must provide examples of various strategic plans, as well as at least one reference (preferably three references) that FVHD may contact regarding the work performance of the bidder.

***Approach: (max: 30 points)***

The bidder must provide an outline and narrative description of its plan and timeline to complete the development of the strategic plan including the services outlined in 2.3 above.

***Cost and Price: (max: 20 points)***

The bidder must include the breakout for services offered in the proposal.

***Availability: (max: 5 points)***

Bidder must be available to facilitate meetings in person.

TOTAL (max: 100 points)