



## REQUEST FOR PROPOSALS (RFP)

### Mental Health/Human Services Consulting & Strategic Planning

Issue Date: April 25, 2023	Response Deadline: Tuesday, May 9, 2023 EOD
Issued By:	
Warren County Development Association 308 Market Street Warren, PA 16365 Email: <a href="mailto:ejeff@warrencountypa.gov">ejeff@warrencountypa.gov</a> Phone: 814-584-2203	Forest Warren Human Services 285 Hospital Drive Warren PA 16365. Email: <a href="mailto:fromknechtj@wc-hs.org">fromknechtj@wc-hs.org</a> Phone: 814-726-8404
<p><b>Period of Contract:</b> Initial consulting services will start on the date of execution and end on December 31st, 2023, or when work is complete with written authorization from FWHS. There is potential for future contracts based on strategic planning work and the resulting project agenda.</p>	

Forest Warren Human Services will receive proposals for the above solicitation until 4:30 PM EST on Tuesday, May 9, 2023, at their headquarters: Forest Warren Human Services, C/O Jenn Fromknecht, 285 Hospital Drive, Warren, PA 16365 or via email (attention) Jenn Fromknecht at [fromknechtj@wc-hs.org](mailto:fromknechtj@wc-hs.org) with the subject line stating "Human Services Consulting RFP."

Any proposal received after the specified time and date will not be considered. Proposals opening shall occur at 2:00 PM, May 10, 2020, via ZOOM video meeting. Offerors may join the meeting by contacting Jenn Fromknecht (email: [fromknechtj@wc-hs.org](mailto:fromknechtj@wc-hs.org) or phone: 814-726-8404) and requesting an invite. The meeting login will also be available on Warren County's website (<https://warrencountypa.gov/>) after the deadline (May 9) is reached.

Inquiries For Information Should Be Directed To: Jenn Fromknecht (email: [fromknechtj@wc-hs.org](mailto:fromknechtj@wc-hs.org) or phone: 814-726-8404). All questions must be submitted via e-mail before 4:30 PM EST, Friday, May 5, 2023. RFP Documents may be examined at Forest Warren Human Services, located at 285 Hospital Drive, Warren, PA 16365. Electronic copies of RFP documents in PDF format are available for download on the Forest Warren Human Services website at <https://wc-hs.org/1178/ForestWarrenHuman-Services>.

Offerors may request a pre-proposal meeting to discuss the RFP by contacting Jenn Fromknecht (email: [fromknechtj@wc-hs.org](mailto:fromknechtj@wc-hs.org) or phone: 814-726-8404) and requesting an invite.

## 1 Introduction

Forest Warren Human Services (FWHS) is seeking proposals from experienced and qualified consultants to provide strategic planning services. As a leading human services agency, we are dedicated to delivering high-quality services to our community. We recognize the importance of strategic planning in guiding our organization's future direction. We are seeking a skilled consultant who can facilitate our strategic planning process, provide expert guidance, and deliver a comprehensive strategic plan that aligns with our agency's goals and objectives.

## 2 Background

Forest Warren Human Services is a county-based human services management organization comprised of intergovernmental cooperation between Warren and Forest Counties in Pennsylvania. The agency comprises roughly 65 individuals administering services in Children and Youth, Developmental Disabilities, Early Intervention, Drugs and Alcohol, Mental Health, and other human services departments. FWHS is responsible for human services contracting and delivery for Warren County, population 38,134, and Forest County, population 7032. FWHS manages federal, state, and local government funds to contract with local human services agencies to provide services to these communities.

In 2018, FWHS collaborated with local providers utilizing a federal grant to conduct a “Human Services Summit” with the assistance of a consultant. That summit produced an extensive report with recommendations on improving human services delivery in Warren and Forest Counties. After the report was produced, a change in FWHS administration and the onset of COVID-19 delayed any significant execution of the initiatives outlined in that report.

It is the wish of FWHS that the report be used as a basis for further planning and recognizes the effort as a starting point for larger strategic planning around human services.

The Warren County Development Association (WCDA) is the fiduciary agent for this project, despite the project management administered by FWHS. The WCDA is paying for the project via a grant secured from the Commonwealth of Pennsylvania to address the mental health effects of COVID-19 on the community.

## 3 Objective

The objective of this RFP is to engage a qualified consultant to assist us in developing a strategic plan that will guide our agency's activities over the next 3-5 years. The strategic plan should be practical, actionable, and aligned with our agency's mission, vision, and goals. The plan should also incorporate best practices in the human services field, taking into account industry trends, emerging issues, and the unique needs of our community.

## **4 Scope of Work**

The selected consultant will be responsible for leading the strategic planning process in close collaboration with our agency's leadership team. The scope of work for the consultant may include, but is not limited to, the following:

### **4.1 Needs Assessment**

Conduct a comprehensive needs assessment to identify our agency's strengths, weaknesses, opportunities, and threats (SWOT). This may include reviewing relevant documents such as the Human Service Summit Report, conducting stakeholder interviews, and facilitating focus groups or workshops. This may include a community survey and other data-gathering tools.

### **4.2 Goal Setting**

Work with our leadership team to establish clear and measurable goals and objectives for our agency. These goals should align with our mission, vision, and core values and should be realistic and achievable within the proposed time frame. That can include the development of a vision statement, guiding principles, a strategic map, and measurable objectives for the next five years.

### **4.3 Strategic Plan Development**

Facilitate a strategic planning process that includes the development of a strategic framework, action plans, and performance indicators. The strategic plan should outline the strategies, tactics, and resources needed to achieve our agency's goals and objectives and should provide a roadmap for implementation. The comprehensive human services plan should serve the human service needs of citizens ages 0 to 100 to include housing, early childhood, foster care prevention, services for seniors, neighborhoods of concern, out-of-school time, and inform stakeholders on areas of need and services provided.

### **4.4 Stakeholder Engagement**

Engage key stakeholders throughout the strategic planning process, including agency staff, board members, community partners, and other relevant stakeholders. The consultant should facilitate stakeholder input sessions and ensure that diverse perspectives are considered in the development of the strategic plan.

### **4.5 Implementation Support**

Provide guidance and support to our agency's leadership team in implementing the strategic plan. This may include assisting with the development of implementation plans, providing training and capacity-building support, and monitoring progress toward achieving the strategic goals.

### **4.6 Evaluation and Reporting**

Develop a system for monitoring and evaluating the implementation of the strategic plan. The consultant should assist with developing performance indicators and measurement tools to assess the strategic plan's success.

#### 4.7 Final Deliverables

The following is a complete list of items that will be produced as a part of this project.

- a. **Comprehensive Strategic 5-Year Plan** – This is the main item for the project which is outlined extensively in this RFP.
- b. **Map of the System** – One of the items in the Human Services Summit Report is a “map of the system,” which would be a printed, PDF, and online map that users can access to navigate a path for services. As an example, if an individual had a child with a disability, they could look at the map and get a sense of where they would go to get services and what types of general services they might receive. The county currently has a printed brochure generated by a local nonprofit which lists providers, but there is little a potential client can discern from reading that document. The fundamental goal is to have a complete picture of the services provided in Warren and Forest Counties and a system by which users can simply and easily access information about those services.
- c. **Outline for Continuity of Care Position** – FWHS is looking to create a “concierge” type position that would work with clients to improve continuity of care. The position would not be clinical, but instead, have a solid knowledge of the system and a positive bedside manner and be a point of contact for consumers. The goal of this item would be to have an evaluation of the concept of the position, its salary and scope, and a plan for executing the position.
- d. **Evaluation and Reporting Strategy Plan** – As outlined earlier in the RFP, FWHS would like a plan to execute the plan and measure its success.

### 5 Schedule of Events

Forest Warren Human Services will make every effort to adhere to the following schedule leading to the award of a contract; however, this schedule is subject to change. Offerors will be notified of significant schedule changes.

Action	Date
Issuance of RFP	April 25, 2023
Submission of Questions or Requests for Pre-Proposal Meeting	4:30 PM EST, Friday, May 5, 2023
Submission of Proposals	4:30 PM EST on Tuesday, May 9, 2023
Review Proposals	2:00 PM, Wednesday, May 10, 2020, via ZOOM
Contract Award	Second Week in May 2023

## 6 Conflicts and Questions

Should there be conflicts with the RFP and a proposal, the RFP takes precedence unless otherwise agreed to in writing.

Inquiries For Information Should Be Directed To: Jenn Fromknecht (email: [fromknechtj@wc-hs.org](mailto:fromknechtj@wc-hs.org) or phone: 814-726-8404). All questions must be submitted via e-mail before 4:30 PM EST, Friday, April 28, 2023.

**Conflict of Interest:** The Offeror represents to the WCDA and FWHS that by entering into this agreement with the WCDA it does not entail any violation of Pennsylvania conflict of interest laws.

## 7 Proposal Preparation and Submission Instructions

- a. An authorized representative of the offeror shall sign proposals. This includes, at a minimum, the RFP Cover sheet and all Addendums. All information requested must be submitted. Failure to submit all information requested may result in the FWHS administration requiring prompt submission of missing information, giving a lowered evaluation of the proposal, and/or finding the proposal non-responsive.
- b. Proposals should be prepared economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content. Elaborate brochures and excessive promotional materials are not required or desired.
- c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered.
- d. SPECIFIC PROPOSAL INSTRUCTIONS for submitting a completed proposal. The proposal should contain a table of contents that cross-references the RFP requirements. Information that the Offeror desires to present that does not fall within an area of the requirement of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized as outlined risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed. The following information must be contained in the proposal. Proposals submitted are to conform to the following:
  1. Proposals should be organized in the order in which the requirements are presented in the RFP.
  2. All pages of the proposal should be numbered.
  3. Submitted as one (1) bound section, and be as thorough and detailed as possible so that the FWHS team may properly evaluate the offeror's capabilities to provide required services

- e. As used in this RFP, the terms "must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. The terms "should" or "may" are highly desirable and would be useful, but their absence will not have a large impact, and they are not absolutely necessary. The inability of an Offeror to satisfy a "must" or "shall" requirement does not automatically remove that Offeror from consideration; however, it may seriously affect the overall rating of the Offeror's proposal.
- f. Ownership of all data, materials, and documentation originated and prepared for FWHS pursuant to the RFP shall belong exclusively to the WCDA and FWHS and be subject to public inspection in accordance with the Pennsylvania Freedom of Information Act.
- g. Any and all costs or expenses incurred or associated with the preparation of responses to this Request for Proposals, including site visits, oral presentations, and any other costs, shall be entirely the responsibility of the offeror and shall not be reimbursable in any manner by the WCDA or FWHS.
- h. Forest Warren Human Services reserves the right to reject any or all proposals, to waive any technicalities in proposals received, and to negotiate and accept the proposal, which shall be in the WCDA's, FWHS's, and community's best interest.
- i. The WCDA or FWHS may cancel this Request for Proposals at any time prior to an award and is not required to furnish a reason why a particular proposal was not deemed the most advantageous.
- j. The right is reserved, as the interests of the WCDA or FWHS may require, to revise and/or amend the specifications prior to the date set for acceptance of proposals; the acceptance date may be postponed if deemed necessary by the Forest Warren Human Services Administrator. Such revisions and amendments, if any, will be announced by an addendum to this solicitation and posted on Warren County's website.

## **8 Specific Proposal Instructions**

### **8.1 Format**

Proposals may be submitted in digital or print format. Please include 5 copies of the printed proposal if they are provided in print format. If providing a print format, an accompanying digital version via email is preferred. Proposals should be submitted as one (1) bound section and as thorough and detailed as possible so that the FWHS Team can properly evaluate the offeror's capabilities to provide required services.

### **8.2 Letter of Transmittal**

The letter will have a brief executive summary of the Offeror's understanding of the services sought through this RFP, and a description of the underlying philosophy of the Offeror in providing the services. The name, position, address, telephone number, and email address of the individual(s) who are authorized to make representations on behalf of the Offeror. Include a

statement that the signatory on the transmittal letter and the RFP Offer is authorized to bind the Offeror to contract with the WCDA and FWHS.

### **8.3 Qualifications and Experience**

The offeror shall provide a concise description of its work experience as it relates to the Scope of Services outlined herein, including, but not limited to:

- A. A brief history of the firm, including the number of years in business, the size of the firm, the number of office locations, and the location of the office from which the work is to be done.
- B. A minimum of four (4) references, preferably public sector/government organizations, where the firm is currently (or was recently) under contract. References can be from clients in both public, nonprofit, and private sectors, including the following:
  - 1. Name of organization
  - 2. Address of the organization
  - 3. Name, title, email address, phone, and a facsimile of contact for the organization
  - 4. Number of years the offeror has served the organization.

### **8.4 Capabilities and Skills**

The offeror shall provide a description of the firm's capabilities and skills to perform the contract, including, but not limited to:

#### **8.4.1 Specific Plan and Methodology to Perform Services/Resources:**

- A. An overview of Offeror's understanding of the scope of work and services to be provided.
- B. Describe the staff and other resources which will be assigned to this contract and include resumes of those individuals.
- C. Best practice approaches to providing services to FWHS that enhance efficiency and effectiveness. FWHS will consider innovative solutions.
- D. A detail of any assistance, equipment, or other items the Offeror will require FWHS to furnish under the Contract.
- E. A statement explaining why the Offeror's proposed solution would be the most advantageous to FWHS.
- F. A statement explaining process/procedures for conflict resolutions or how issues will be treated and resolved as they arise.

## 8.5 Cost of Services

Proposals shall provide pricing based on the requirements and terms set forth in this RFP. Pricing shall be all-inclusive, covering every aspect of the contract. No additional fees shall be added unless authorized by the WCDA and FWHS.

## 8.6 Additional or Miscellaneous Information

- A. Resumes and other specific items or data requested in the RFP that is not included under a specific category.
- B. The offeror shall provide a copy of the appropriate license(s) and Certificate of Insurance.

## 9 Disclosure of Proposal Contents

Offerors should be aware that the terms of the contract are public information and can be accessed by the public. Except for the selected proposal, all other proposals will be held in confidence and will not be revealed or discussed with competitors unless disclosure is required to be made by law or by a court ruling. FWHS may use any ideas presented in any proposal. Selection or rejection of the proposal does not affect this provision.

## 10 Evaluation and Award Criteria

A committee will evaluate the written proposals and presentations received under this solicitation. That committee will include members of FWHS staff, the Warren and Forest County Commissioners, the Mental Health/ATOD Advisory Board of FWHS, and members of the WCDA. They will provide feedback to the Administrator of FWHS, Adam McNeill, in written form, and the FWHS Administrator will aggregate the data of the evaluation.

Based on the feedback of the committee, FWHS will make an award to the top-rated responsive and responsible proposer determined by the evaluation process, presentations, negotiations, best and final offers, FWHS's business needs, and the proposer's ability to deliver within budget the specified deliverables in a timely manner. Once the committee has ranked proposals, FWHS will initiate contract negotiations with the highest-ranked respondent. If negotiations between FWHS and the highest-ranked respondent fail to produce a mutual agreement, FWHS will terminate those negotiations and proceed with contract negotiations with the next highest-ranked proposer. At FWHS's own discretion, it may continue that process until a mutual agreement is reached between FWHS/WCDA and a proposer.

***Forest Warren Human Services and the WCDA reserve the right to reject any and all proposals.***