



# Request for Proposal Strategic Plan July 2018

## Cover Letter:

Hello, I'm writing on behalf of the Summit of Sustainability Award (SOSA), a group of nonprofit, governmental and for-profit businesses who are committed to improving and expanding the sustainable operations of organizations in the greater Akron area. Details about our history and operation are in the attached Request for Proposals (RFP).

Your name was provided to us as we prepare for the next phase of SOSA's outreach in the local business community. We are seeking a firm to work with us in creating a three year strategic plan. We envision the scope of work to include a demand assessment for business to business training, networking and consulting/support services. We have outlined a strategic plan in four parts: History and Benchmarking, Organizational, Financial and Communications.

If after reviewing the details provided in the RFP, you have interest or additional questions, please let me know. RFPs may be submitted via email, no later than Tuesday August 14<sup>th</sup> at 4pm.

We very much hope that you will consider applying to work with us.

Yours in Sustainability,

Chris

Christopher E. Norman  
Director of Capital Projects and Sustainability  
Akron Zoo  
500 Edgewood Avenue  
Akron, Ohio 44307-2199  
p: 330.375.2550 ext. 7248  
f: 330.375.2575  
[www.akronzoo.org](http://www.akronzoo.org)



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# Request for Proposal

## Strategic Plan

July 2018

**The Summit of Sustainability Awards (“SOSA”) wishes to contract the services of a consultant (“Selected Consultant”) to develop a three year Strategic Plan.**

### **I. Background**

SOSA was created in 2012

*Vision:*

To create a sustainable community throughout Summit County

*Mission Statement:*

To provide educational resources and training in sustainability planning and recognize leadership in businesses and organizations who successfully implement those plans.

*Awards:*

From 2012 to 2015, SOSA provided awards to local organizations to recognize successfully implemented sustainability practices.

A history of recipients’ respective YouTube links can be found at this site ([summitofsustainability.org](http://summitofsustainability.org) -scroll down the page)

*Events:*

In place of awards in 2016, the SOSA and their sponsors, Akron Zoo, Waste Management and the City of Akron, hosted a series of sustainability workshops. The workshop topics included Cleveland’s Sustainability Program, a Sustainable Grant Workshop and Smart Water Use 101.

Workshops encouraged networking and sharing of sustainability challenges and strategies.

### **II. Purpose**

The Selected Consultant will provide a Strategic Plan that outlines three-year goals and objectives. The strategic plan must outline how to reach these goals.

SOSA understands that there are a variety of perspectives, models, and approaches that can be used to develop a strategic planning document; therefore, the Selected Consultant should be able to discern which model or model(s) will enable SOSA to complete its goals.

### **III. Scope**

The strategic plan proposed should contain a description of each work task with an explanation of how the consultant plans to approach the tasks and steps that will be taken to complete each task including analytical methods and tools. Tasks should be organized into phases that have measurable deliverables.



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## Strategic Plan

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Using a three-year time line the Strategic Plan developed by the Selected Consultant should identify focus areas for SOSA. Identify critical issues facing SOSA in its effort to attain goals set forth in the plan and list available resources that can be utilized to resolve issues. Listed below are the areas of focus.

- A. History and Benchmarking
  - i. Interview SOSA members for history and information
  - ii. Comparison of SOSA to similar organizations in the region.
  - iii. Assess the demand for business-to-business sustainability training
  
- B. Organizational Plan
  - i. Administrative structure
  - ii. Partnerships and leadership
  - iii. Vision and Mission
    - 1. Potential Services
  
- C. Financial Plan
  - i. Identify a fiscal officer
  - ii. Funding structure
  
- D. Communication Plan
  - i. Methods to communicate the message for mission going forward

#### IV. Budget

The budget for this project is up to a maximum of \$10,000. Achieving good value for our expenditure for the project is an important factor in assessing proposals. Proposal fees shall be submitted in the format provided in *Attachment A: Proposal Fee Summary*.

#### V. Reports and Payments

The Selected Consultant shall be compensated in three installments following the schedule as stated below:

|                        |           |                    |                  |
|------------------------|-----------|--------------------|------------------|
| Installment payment #1 | submitted | September 30, 2018 | 25% of total fee |
| Installment payment #2 | submitted | October 31, 2018   | 25% of total fee |
| Final Payment          | submitted | December 20, 2018  | 50% of total fee |

Prior to installment payments #1 and #2, the Selected Consultant must submit a report that shall include a statement of services rendered. Such statement shall include, at a minimum, a detailed description of the services provided to SOSA under the category headings contained under "Section III Scope" of this RFP. The final installment payment shall be made upon receipt and approval of the Final Report. SOSA reserves the right to withhold payment until receipt of the itemized statement described above.



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## VI. Project Timeline

The project will follow the timeline outlined below and may be altered at the sole discretion of SOSA:

|                   |   |
|-------------------|---|
| July 27, 2018     | (Revised) release of Request for Proposal |
| August 14, 2018   | (Revised) proposals due date              |
| August 24, 2018   | Select Consultant/Contract Awarded        |
| September 3, 2018 | Consultant starts Plan                    |
| December 7, 2018  | Final Report Completed and Presented      |

## VII. Proposal Submission/Evaluation

The following is a list of items that must be included in your proposal. Proposals should be no longer than three (3) single-sided pages (cover page not included)

Please submit one (1) electronic copy by Tuesday, August 14, 2018 at 4:00 pm to: Chris Norman. Email: [c.norman@akroknzoo.org](mailto:c.norman@akroknzoo.org)

- A. Cover Page  
Include the date, name, title and contact information of the person who prepared the proposal, and the telephone, email address, web address and physical address of office.
- B. Relevant experience and background of consultant 25 points  
Brief summary of relevant experience with similar projects and background. References of recent projects should be included.
- C. Project Plan of implementation- scope, methodology, and tasks 15 points  
Proposals must include specific descriptions of how the work would be carried out, proposed tasks and activities along with proposed involvement and resources to be.
- D. Total Fee to Complete the project as proposed in this RFP 10 points  
(Per format in *Attachment A: Proposal Fee Summary*)

**Total Points 50**



**VIII. Right to Reject Any or All Quotes**

SOSA reserves the right to reject any or all price quotes, to waive technicalities or formalities, and to accept any price quote and proposal deemed in the best interest of SOSA.

**IX. Contract**

It is recognized that the formal basis of any agreement between SOSA and the Selected Consultant is a contract rather than a proposal. In submitting price quotes, consultants must indicate that they are prepared to complete a contract containing all the information submitted in their price quote. The price quote will become part of the contract between SOSA and the Successful Consultant. If the consultant has a specific contract that they wish to use, the consultant must submit a sample along with the RFP.

*[Attachment A on following page]*



**ATTACHMENT A:**  
**Proposal Fee Summary**

Provide an average hourly rate with an estimate of the total hours needed to per task and a total estimated price.

| Project Task                | Average Hourly Rate | Total Estimated Hours | Total Price |
|-----------------------------|---------------------|-----------------------|-------------|
| A. History and Benchmarking |                     |                       |             |
| B. Organizational Plan      |                     |                       |             |
| C. Financial Plan           |                     |                       |             |
| D. Communication Plan       |                     |                       |             |
| Other (Describe)            |                     |                       |             |
| Other (Describe)            |                     |                       |             |
| <b>TOTAL NOT TO EXCEED</b>  |                     |                       |             |