

July 24, 2023

REQUEST FOR PROPOSAL
SAU #44 - Northwood School District
RFP NORT 07-24
Strategic Planning for the Northwood School District

You are cordially invited to submit a proposal for **Strategic Planning for the Northwood School District** in accordance with the attached specifications, terms and conditions. Prospective respondents are advised to read this information over carefully prior to submitting.

Seven (7) Copies of the Proposal or one electronic copy must be submitted in a sealed envelope, plainly marked:

SAU #44 - Northwood School District
Strategic Planning for the Northwood School District
Superintendent's Office
23A Mountain Ave
Northwood, NH 03261

All proposals must be received by **September 1, 2023** at **2:00 PM EST**

I. INTRODUCTION

SAU #44, The Northwood School District, of Northwood NH (hereinafter referred to as the “District”) is seeking proposals from qualified consulting firms to facilitate the District’s strategic planning process as outlined in the scope of work below. The District’s goal is to develop a comprehensive, dynamic plan that includes academic programs (pedagogy, technology, professional development, school day, etc.); parent and community partnerships; system accountability for meeting the academic needs of all students; human resources; and business operations to support teaching and learning.

Additionally, services are requested to recommend improvements that will best and fully support the Northwood School District’s mission to inspire students to be lifelong learners. As a community, we are committed to providing a safe, challenging environment that encourages all students to aspire to excellence. We do this based on our beliefs of the 8 Conditions of Student Aspirations.

II. INFORMATION AVAILABLE

The District currently serves approximately 600 students and employs approximately 80 full and part time employees, both instructional and operational. Facilities to be included in this work the Northwood School District.

III. SCOPE OF WORK

The District is looking to retain a qualified and committed ***Strategic Planning Consultant*** to assist in the facilitation, creation, implementation, and monitoring of a successful 5 year strategic plan. The consultant shall demonstrate the ability to deliver the following services:

- Support the development of a strategic plan that will be dynamic and adaptable to the changing environment of the community and District.
- Examine existing strategy information including the mission, vision, last strategic plan and key indicators to develop a summary of the present state of the District and to customize a process that aligns with the District’s specific needs, one which builds on existing strengths and draws from best practices, including development of tools for collecting and working with data that will inform the strategic planning process.
- Assist the District with the formation of an effective strategic planning committee.
- Actively engage and facilitate all key stakeholder groups, including students, staff, community, parents, and School Board to ensure all have an opportunity to provide structured input.
- Analyze strategic planning committee findings and survey results.
- Identify and provide summaries of any strengths/weaknesses and opportunities/challenges through the review and analysis of data.
- Outline a process to ensure implementation and evaluation of the plan with measurable key performance-based indicators/metrics.
- Ensure alignment of priority initiatives, mandates and resources.
- Provide a detailed explanation of how the consultant will approach various tasks, including a timeline and methods to keep the process on track, on time and on budget.

Project Deliverables shall include the following items:

- Needs Assessment.
- Implementation Methodology.
- Assessment of all key stakeholders’ input and perspectives.
- Preliminary report and recommendations.
- Final report and a five-year strategic plan, including the means for assessing ongoing implementation.

- Structured process that will facilitate continued review and improvement of the strategic plan by future committees.

Minimum Requirements to be included in final proposal:

- The Firm shall have a fully developed proposal with a detailed project outline, timeline, and approach.
- The Firm should clearly identify the consultant and state the individual's level of responsibility for overall project quality, cohesiveness, and timely completion.
- The Firm should clearly define any other staff or positions assigned and their level of meaningful involvement.
- The Firm shall include an all-inclusive lump sum and detailed budget. Any costs in addition to the lump sum, such as expenses for mileage, tolls and room and board must be specified and itemized separately and in detail in the final proposal. Please provide the hourly rate(s) for any additional work performed outside of the agreement and asked for by the District. Any additional work outside the scope of work must be approved in writing by the District.

IV. TIMELINE

It is anticipated that contract work will start October 2, 2023 and end when the strategic plan is completed, approximately March 1, 2024.

V. GENERAL REQUIREMENTS

Vendors submitting proposals must respond in writing to all requirements of this Request for Proposal (RFP). Responses should reflect detailed considerations of the issues and opportunities presented by this specific project. Any additional information or tasks that are felt to be relevant by the responding firm should be included together with submittal requirements.

No late proposals will be accepted.

Costs incurred for the preparation of a proposal in response to this RFP shall be the sole responsibility of the vendor submitting the proposal. The Northwood School District reserves the right to select or reject any vendor that it deems to be in the best interest to accomplish the project specified. The District reserves the right to accept the proposal on one or more items of a proposal, on all items of a proposal or any combination of items. The District reserves the right to discontinue the selection process at any time prior to the awarding of a contract. The District reserves the right to waive defects and informalities of the proposals.

Questions shall be directed in writing to Christine Blouin at cblouin@nhsau44.org **no later than seven (7) days prior to bid date and time on cover page of this document.**

Procurement information shall be a governmental record to the extent provided in NH RSA 91: A and RSA 91-A: 5 and shall be available to the public. Proprietary information shall be considered a governmental record. Vendors seeking to restrict public access to information contained in a response shall address concerns with the Contract Coordinator prior to submission of the response.

Representatives from candidate firms are prohibited from making any contact with members of the School Board and District staff with regard to this Request for Proposal, except to seek clarification of the requirements from the Contract Coordinator as noted above. The District reserves the right to disqualify any candidate firm found to have improperly contacted members of the School Board or District staff with regard to this Request for Proposal.

Candidate Firm Selection Schedule:

- Issuance of Request for Proposal: July ##, 2023
- Deadline for Submissions: September 1, 2023
- Selection of Finalists: September 6, 2023
- Interview/Presentation to the Northwood School Board, if applicable: September 20, 2023
- Proposed School Board Action: September 20, 2023

VI. SUBMITTAL REQUIREMENTS (any missing items may result in rejection of the proposal)

The items listed below shall be submitted with each submission in the order shown. Each section should be clearly labeled, with pages numbered and separated by tabs. Failure by a submitter to include all listed items may result in their submission being rejected.

Tab 1: Cover Letter

- Provide a cover letter indicating your firm's understanding of the requirements relating to this submission. The letter must be brief and formal from the submitter that provides information regarding the firm's interest in and ability to perform the requirements of this RFP. A person who is authorized by the organization to enter into an agreement with the Northwood School District will sign the letter.

Tab 2: Acceptance of Conditions

- Indicate any exceptions to the specifications, terms and conditions of this RFP, including the Scope of Services and sample agreement terms.

Tab 3: Company Background

- Years in business under present name.
- Any business name changes and the reason for the change.
- Number of world-wide offices and specific address of the office supporting this project.
- Ownership structure (Corporation / Partnership)
- Names and titles of officers in the company.
- Company trade organization / associations / affiliations.
- Description of the firm's philosophy.

Tab 4: Qualifications and References

- Describe firm qualifications, experience and project understanding.
- Demonstrate the firm's qualifications and experience in similar projects.
- Provide references with contact name and telephone number of similar projects for which the firm has, in whole or in part, provided services.

Tab 5: Technical Proposal

- Describe the firm's overall philosophy and methodology for completing a similar project.
- Describe the specific process the firm will use to achieve the required outcomes.
- Outline the schedule to be implemented to meet the expected project requirements.
- Describe the project management approach the firm will use to maintain the agreed upon implementation schedule.

Tab 6: Firm Resources

- Describe the firm's personnel resources available. If a sole proprietor, indicate so.
- Describe key personnel to be assigned from within the firm and any key outside sub-consulting firms for this project, if any.

- Describe the firm's physical availability to the Northwood School District in terms of communication, meetings and fieldwork.
- Provide information on current workload and describe how the firm would accommodate this project.

Tab 7: List of Ongoing and Completed Projects

- Provide a list of similar projects in which your firm is currently involved or has been involved.
- Please list project description, status and dollar volume of each.

Tab 8: Financial

- Financial references and current bonding limitations.
- Is your firm currently involved in, or are you anticipating, any litigation, arbitration or mediation? If so, please explain.

Tab 9: Other

- Other information, qualifications and/or exceptions that the firm may consider appropriate to the selection process.

Tab 10: Cost Proposal

- As outlined in the *Minimum Requirements to be included in the Final Proposal*, the cost proposal shall include an all-inclusive lump sum and detailed budget. Any costs in addition to the lump sum, such as expenses for mileage, tolls and room and board must be specified and itemized separately and in detail. Please also provide the hourly rate(s) for any additional work outside of the agreement and asked for by the District.

The Northwood School District reserves the right to use additional criteria or analysis tools in making their ultimate selection of firm(s). Consultants should review these criteria in combination with all materials in the RFP package.

Insurance

The successful vendor will be required to submit a certificate of insurance showing minimum liability limits of \$1,000,000.00 per occurrence and \$2,000,000.00 aggregate, types of liability coverage and workers compensation participation. Thirty-day notice is required for cancellation of policy and Northwood School District shall be listed as an additional insured.

Independent Contractor Relationship

The vendor shall perform services as an independent contractor, and shall have and maintain complete control over all of its employees, agents, and operations. Neither the vendor nor anyone employed by it shall be, represent, act, purport to act or be deemed to be the agent, representative, employee or servant of the Northwood School District.

The vendor selected by this Request for Proposal will be working as an independent contractor and will be required to take out and keep in force all permits, licenses, certifications, other approvals, and or insurance that may be required by the Northwood School District, any local or regional governmental agency, the State of New Hampshire, or the federal government. Failure to comply with any of these items would be grounds for immediate cancellation of the contract.

Contract Terms

The contents of the successful vendor's proposal and of this request will become part of any contract awarded as a result of this Request. The successful vendor shall sign a written contract with the Northwood School District. Additional terms and conditions will be included in the contract.

VII. SELECTION

The Northwood School District will review submissions. After review of submissions and prior to final selection, the District may, at its discretion, conduct interviews with a limited number of firm(s). If the District desires to interview a firm, that firm will receive notification of the date and time of the interview.

Firms who are interviewed should anticipate interviews that focus on their approach to this project and the team of professionals who will be directly involved in the project.

The District is under no obligation to grant interviews to any vendor receiving a copy of this RFP and/or submitting a written response to this RFP.

CRITERIA FOR EVALUATION SHALL INCLUDE:

- Specialized experience is required in strategic planning with public schools.
- Quality of information based on completeness, relevance, conciseness and organization of materials.
- Proposals must clearly demonstrate full knowledge, understanding and experience in methods, techniques and guidelines.
- Capacity and capability of the consultant to perform the work on schedule and to be responsive to the District's strategic planning concerns.
- Recommendations from references provided for similar projects including demonstrated successful implementation and positive client relationship.
- Creativity in developing unique solutions in school projects.
- Possession of the available resources to complete the project.
- Demonstrated ability to meet schedules and proposed project budgets.

FORMAT OF PROPOSAL

Mail proposals should be formatted to 8.5"x11" pages and contents bound. Submissions shall be sealed and clearly marked **Strategic Planning for SAU #44, the Northwood School District**.

E-mailed proposals should include no more than one attachment per file kind (i.e. PDF, Word, PPT, etc..). Submissions shall be e-mailed to cblouin@nhsau44.org and clearly marked **Strategic Planning for SAU #44, the Northwood School District**.

Proposals submitted by the bidder shall be signed by an official authorized to bind the firm and shall contain a notarized statement to the effects that the proposal is a firm offer for a thirty-day (30) period. The following information must be submitted with the proposal: Name, title, address and telephone numbers of individuals with authority to contractually bind the company, and the name and telephone number of the contact person for clarification of submitted bid information.

BID, RFP AND QUOTE TERMS AND CONDITIONS

1. **BID ACCEPTANCE AND REJECTIONS:** The Northwood School District reserves the right to accept any bid, and to reject any or all bids; to award the bid to other than the low bidder if deemed "bid most advantageous to the District"; to accept the bid on one or more items of a proposal, on all items of a proposal or any combination of items of a proposal and to waive any defects in bids.
2. **FINAL BID PRICE:** Terms and FOB point are always part of the bid. FOB POINT IS ALWAYS TO BE NORTHWOOD, NH UNLESS OTHERWISE INDICATED BY THE BIDDER. IT IS THE BIDDER'S

RESPONSIBILITY TO SO DESIGNATE A FOB POINT OTHER THAN NORTHWOOD. If the bidder has any special payment or delivery clauses which could affect the final delivery price of an item up for bid, that too shall be made part of the bid. If, however, this is not included in the bid, the seller will be solely responsible for any increased prices due to any circumstances.

3. LATE PROPOSALS/BIDS: Any bids received after specified date and time will not be considered, nor will late bids be opened.
4. PAYMENT TERMS: It is the custom of the Northwood School District to pay its bills within 20 – 30 working days following delivery of, and receipt for, all items covered by the purchase order. In submitting bids under these specifications, the Bidder should take into account all discounts, both trade and time, allowed in accordance with the above payment policy.
5. BRAND NAMES: When the item is offered of a brand that is not known for use and/or reputation and financial stability is not well and favorably known to these officials, bids on such unknown brand may be rejected because of this lack of knowledge alone. Prospective bidders with such unknown brand should give information concerning it to the Business Administrator so that it may be checked into for bids for the coming year. The Bidder will state in the proposal the brand name and any guarantees of the material the Bidder proposes to furnish. The brand name is to be for the material that meets all specifications.
6. SUBCONTRACTORS: Where a project involves utilizing subcontractors, and the project is completed satisfactorily, the Northwood School District reserves the right to request proof of payment to subcontractors by the general contractor prior to making final payment to the general contractor.
7. PROPER DOCUMENTATION: Any respondent to a bid request should sign off on and return to the Superintendent's Office the original Bid Documentation Package which explains the scope of the bid request. Said signature, in the spaces provided, indicates receipt of, familiarity with and understanding of, and acceptance of the specifications provided, except as otherwise noted by the respondent.