



Request for Proposal Strategic Planning Process and Facilitation

The Board of Directors of Maryland Inclusive Housing is launching a strategic planning process for the organization that will define its direction for the next two to three years. The successful consultant will design a process to solicit input from the diverse range of stakeholders and complete work in the four areas described in the scope of work in this RFP.

The process is expected to take five months, starting in February 2022, and ending in June 2022.

Mission

The mission of Maryland Inclusive Housing Corporation (MIH) is to help people with Intellectual and Developmental Disabilities (IDD) successfully access and maintain inclusive, affordable, and accessible housing of their choice by creating opportunities, identifying resources, connecting people, and providing services.

Core values

1. Person Centered - Respect people as they are, without judgment; presume competence, have high expectations, and recognize each person's choices, talents, and values.
2. Knowledgeable - MIH understands state and local affordable and accessible housing resources and is committed to using those resources to help people.
3. Reliable & Trustworthy - Provide accurate relevant and timely information to people with IDD, their families, and other stakeholders and facilitate informed choice. Provide resources which make sense for the individual.
4. Innovative - Pursue new housing resources, partnerships and approaches utilizing an open mind, active listening, and a futuristic outlook. Have a curious mind, pursuing partnerships and novel ideas. Be nimble, flexible, and open to change.
5. Respectful - Treat all people with respect, honor dignity of risk, and an individual's authority to make their own life decisions. Honor choice/decisions and a person's authority over their own life.

Strategic Anchors

1. Build strong partnerships. MIH actively works to build partnerships with people with IDD, families, relevant state partners, affordable housing advocacy groups, self-advocacy groups, service providers, developers, expand typical partnerships and find ways to collaborate and share resources to strengthen systems.
2. Educate and Advocate. MIH educates people with IDD and their families, service providers, and developers about how to create and access affordable, inclusive, and accessible housing. MIH will provide training to professionals in this evolving area of work. MIH will advocate for additional resources to support more affordable, accessible housing and more housing support services.



3. Create Inclusive Communities. Through education, advocacy, partnerships and support services, MIH promotes communities where people with and without disabilities live together and where people with IDD are active participants in their communities. Inclusive Communities are defined by considering separation of ownership and services, density of people with disabilities living together and access to services.

Areas of Work

MIH has three main areas of work:

- 1) to facilitate the creation of housing teams in regions or counties throughout the state.
- 2) to employ Community Living Coordinators who would work as housing case managers for individuals who are receiving DDA services or are on the DDA waiting list; and
- 3) to be a housing information clearinghouse for DDA, for individuals with IDD and their families and for CCS workers and service providers.

Scope of Work

Key areas of work with approximate timelines are as follows:

- Conduct a strategic assessment/environmental scan of all key areas of work, including a thorough review of existing materials and interviews with key stakeholders (staff, board members, partners, program participants, volunteers, and beneficiaries) target date; 3-1-2022
- Create a summary of the strategic review for discussion by the Board of Directors that identifies and outlines key questions to be discussed at a facilitated retreat. Target date; 4-1-2022
- Design and facilitate strategic planning meeting(s) for the board, staff, and key stakeholders to discuss the key questions, aiming for consensus results. Target date; May 2022
- In collaboration with staff and Strategic Planning Committee of the board, synthesize the discussions into a two or three-year strategic plan document for MIH, for review and approval by the Board of Directors. Target date; 6-1-2022

of note: the Scope of Work for this project does **not include a review or revalidation of the organization's mission, core values or strategic anchors. These guiding elements of the organization were previously (and recently) explored, reviewed, and reconfirmed by 100% board agreement and shall remain intact.*

Specific Objectives

The objective of this project is to assist MIH in producing a comprehensive strategic plan that will:

- Describe MIH's current conditions and operating environment (assessment of current program offerings and business model, stakeholder feedback, analysis of competitors, trend assessment, organizational strengths and challenges);



- Clearly identify MIH's desired impact for the next two to three years;
- Clearly outline organizational objectives in all key program areas that will help to achieve the desired impact;
- Define and outline indicators of success to track progress on the objectives;
- Articulate MIH's strengths and how it can strategically apply them to achieve the objectives and desired impact;
- Identify strategic directions and partnerships, and tools that will assist in assessing future opportunities;
- Identify the organizational capacity (at both the Board and staff level) that is required to successfully implement the chosen strategies and objectives; and
- Identify strategic ways to generate the revenue needed to meet the new objectives and outcomes.

Information Session:

An information session will be held via Zoom to review this Request for Funding Proposal and to ask questions. Attendance is not mandatory. Interested participants should request the Zoom link.

Submission Details

If interested, please submit one emailed copy of a proposal in response to this RFP. The proposal should include the following information:

- Name and contact information and the names of any other participating consultants;
- Statement of qualifications to undertake this initiative;
- Summary of similar work conducted, highlighting specific accomplishments and also highlighting your experience evaluating, updating and revising strategic plans versus conducting the process from the ground-up;
- Your opinion on 5 critical factors that contribute to successful strategic planning;
- A narrative description of the proposed process, activities and approach, including one facilitated half day retreat.
- Timeline for the work;
- A detailed list of time/date commitment **conflicts**; these are all dates the respondent would be unavailable to conduct a facilitation during the months of May and June;
- Fee & budget (identifying anticipated expenses in addition to fees); MIH has budgeted to spend no more than \$20,000 for these services.
- Three business references; and
- Copy of current resume(s).

Please submit proposals via email no later than Friday December 10, 2021, to: Terri Bradford at tbradford@mih-inc.org



Important note: Receipt of all proposals will be acknowledged by email or phone on Monday, December 13th. If you do not receive confirmation by 4 p.m. on December 13th, please contact Terri Bradford or Tim Wiens at 301-242-9627.

Process and Timelines:

RFP released: 11/12/2021

Information Session: 12/2/2021 at 11:00 a.m. via Zoom. Interested participants should request the Zoom link from Terri Bradford at tbradford@mih-inc.org

Proposals due: 12/13/21 by 3 p.m.

Top two to three proposals are selected for interview with Strategic Planning Committee by January 7, 2022.

Vendor selected: 1/14/22

Commencement of work: 2/1/22

Final Product Due: 6/30/22

Procurement Terms and Conditions

Expertise. The successful bidder will have direct experience working with boards of directors and staff members of mid-sized to small, state-wide organizations to initiate and execute strategic planning. Additionally, the successful bidder also will have experience working with organizations engaged in affordable housing, advocacy, education and training, and community engagement. The successful bidder will contribute excellent analytical, interpersonal and verbal and written communications skills exercising knowledge of person-first disability language and etiquette. While experience working with nonprofit and disability-specific advocacy organizations is preferred, these experiences are not required for proposal submission. At least one example of a previous strategic plan shall be provided as part of the application process.

Right to Reject/Cancel. Maryland Inclusive Housing reserves the right to reject any and all submissions received in response to this Request for Proposal. The issuance of this Request for Proposal does not commit Maryland Inclusive Housing to award a Contract. Maryland Inclusive Housing reserves the right to cancel this procurement, to waive any defect or technicality, and to advertise for new proposals, without notice or justification, where the rejection, cancellation, waiver or advertisement would be in the best interests of Maryland Inclusive Housing.

Formal Contract Required. Upon award, Maryland Inclusive Housing and the successful bidder will enter into a Contract based on the factors described in this Request for Proposal. The services to be provided will begin and end on specific dates to be negotiated by the parties. The Contract period shall not exceed five months, from date of Contract execution to submittal of final strategic plan, and the Contract value will not exceed the negotiated and ratified contract fee, unless the time period and/or the Contract value are modified by written,



executed amendment to the Contract. Half of the contract paid up front and the balance upon completion. 10% reduction of the total fee for each month the final product is delivered late, unless timelessness are mutually renegotiated.

No Liability for Costs. Maryland Inclusive Housing shall not be liable for any costs associated with the development, preparation, transmittal, or presentation of any proposal or material submitted in response to this Request for Proposal. Each prospective bidder responding to this Request for Proposal agrees that it will have no claims against Maryland Inclusive Housing for any costs or liabilities incurred relating to this Request for Proposal.

Indemnification. The successful bidder will indemnify and hold harmless Maryland Inclusive Housing, its directors, officers, employees, agents and members from any and all liability resulting from the performance of the services provided under the Contract, including, but not limited to, the acts or omissions of the successful bidder, its directors, officers and employees, any and all sub-Contractor(s) and their employees, and/or from any and all third-party claims related to the Contract.

Applicable Law. This Request for Proposal and any Contract subsequently executed shall be governed and/or construed in accordance with the laws of the State of Maryland.