

REQUEST FOR STRATEGIC PLANNING PROPOSALS

**Willsboro Central School District
Board of Education**



Request for Proposals Issued: May 27, 2021

Deadline for Submittal of Proposals: June 21, 2021

I. OVERVIEW

Introduction

The Willsboro Central School District (WCS) is seeking proposals from qualified consulting firms to facilitate the development and execution of a comprehensive, strategic plan. This intentional re-examination of our mission, vision and prospective educational path should provide a solid long-term foundation for expressing who we are, what we stand for, what we invest in and also why we do what we do for students.

Background

WCS is located in a rural community nestled in the Northeast corner of New York State on Lake Champlain. The district serves over 250 students in one K-12 building.

WCS is located in close proximity to Plattsburgh, Montreal, Burlington, Lake Placid and the Adirondack Mountains. The school budget for 2021-2022 is \$10,114,584.

Purpose for a Strategic Messaging Plan

WCS has long held a high reputation among our state public school systems. We believe in telling our story and celebrating our successes. For years our mission and vision have provided guidance for our school community. Strengthening our overall purpose with a centralized review of the goals, mission and vision and a clear path for our future will pay dividends in the years to come.

Therefore, we are reviewing the District's brand, core beliefs and desired outcomes by adopting an inclusive, multi-stage process where we invite consultants, and a full range of stakeholders including but not limited to teachers, students, parents, alumni, retired district employees, school administrators and staff, community leaders and residents to embark on a journey of reflection, review and innovation. With the help of these voices and perspectives, WCS will create a fresh set of goals and values, capturing and promoting our vision for the immediate and distant future.

We seek a comprehensive campaign that raises the internal and external profile and beliefs of our public school district. The campaign should focus on our brand, continuing to grow digital media efforts, strengthening ties by linking partners, families, community groups, and school personnel together to buy into a common mission and vision.

A new strategic plan to investigate public perception and educational desires via a multi-faceted series of focus groups involving teachers, administrators, students, staff, parents, counselors, social workers, and community representatives will help us build a better WCS for all to be proud of. The strategic plan will fully describe the internal and external environments that act as roadblocks or facilitate our goals to establish goals, allow WCS to excel in comparison to public and private schools within and bordering our district boundaries. The internal and external environment pieces should emphasize how our schools aim to improve the opportunities and performance of student learners at all levels.

Our school community should be interviewed, surveyed, included in focus groups and contacted through social media to draw a rich portrait of the positive, unique features of the WCS. Through such research, the strategic plan will be able to embrace our rich history while we stride boldly toward embracing an ever changing world deep into the 21st Century. Our plan will highlight a district proud of our roots and foundation. The plan will also show a district on a mission, enthusiastic and fully-equipped, to take on the challenges of our ever changing world.

II. GENERAL INSTRUCTIONS

Interested firms are invited to submit one original signed proposal and two (2) hard and digital copies in a protected PDF format.

The proposal shall be submitted in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than April 12, 2021 to the following address:

Brandy Pierce Nolette, District Clerk
RFP for Strategic Planning
Willsboro Central School District
29 School Lane, PO Box 180
Willsboro, N.Y. 12996
bpierce@willsborocsd.org

The sealed envelope shall be marked on the outside lower left corner with the words —RFP for Strategic Planning Facilitation. Each firm has the sole responsibility to ensure that their response is received prior to the scheduled closing time for receipt of statements for qualifications. No corrected or resubmitted statements will be accepted after the deadline. Faxed responses are not appropriate for submission and will not be accepted or considered.

This Request for Proposals does not commit the WCS to award a contract or pay any costs incurred in the preparation of a response to this request. WCS reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Proposals. WCS further reserves the right to accept the response that it considers to be in their best interest.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All responses, whether selected or rejected, shall become the property of WCS.

Requests for Information

Firms interested in making a submission are directed not to make personal contact with the Superintendent or members of the Board of Education. Any contact will constitute grounds for disqualification of consideration. Questions about the RFP, its content, proposal format or any other questions deemed necessary to submit a qualified proposal must be submitted in writing to:

Brandy Pierce Nolette, District Clerk
RFP for Strategic Planning
Willsboro Central School District
29 School Lane, PO Box 180
Willsboro, N.Y. 12996
bpierce@willsborocsd.org

III. SCOPE OF SERVICES

Successful applicants will submit a proposal designed to address the following. Please compose the proposal by identifying each bulleted service:

- Customize the process aligned with WCS' specific needs.
- Identify no more than three to four high-leverage strategic goals with action strategies, implementation steps, costs, timelines and success indicators.
- Ensure inclusion of all stakeholders, that is proportionately representative of the cohort district, and ensure all have an opportunity to provide structured input.
- Involve Board of Education members as an integral part of the process providing input, support and commitment.
- Facilitate conversations with stakeholders.
- Support the strategic planning committees and subcommittees in gathering and organizing internal and external environmental assessments.
- Help communicate the work of the strategic planning committee and subcommittees and the outcomes of their work.
- Keep the process on track, on time and on budget.
- Employ both quantitative and perceptive data to guide WCS in identifying priority goals/strategies.
- Outline a process to ensure implementation and evaluation of the plan with measurable key performance-based indicators/metrics.
- Describe the process for review and possible edits to the vision, mission and beliefs.
- Utilize effective practices and trends within the educational industry, e.g., virtual learning, integration of technology, job readiness skills and educational pathways to ensure students can become quality contributors to society and self upon graduation.

- Include guidelines for resource allocation in the strategic plan.

The Proposal must identify the following:

- The consultant's experience with public school districts, especially facilitating strategic planning processes.
- How the consultant/facilitator will use technology to streamline the process (i.e., electronic input), as well as sufficient opportunities for face-to-face input (i.e., public forums, focus groups) including any technology support needs WCS would be expected to provide.
- Costs must be total and inclusive.
- Team members, including the lead consultant, along with their curriculum vitae and any notifications if team members change.
- How timelines will be aligned with WCS needs.

Deliverables will include:

- Needs Assessment
- Methodology/Dissemination
- Assessment of Representative Stakeholders' Input and Perspectives
- Preliminary Report and Recommendations
- Executive Summary
- Final Report, and Five-Year Vision and Strategic Plan

IV. CONTENTS FOR PROPOSALS

In order for proposals to be considered, said proposal must be clear, concise, complete, well organized and demonstrate both respondent's qualifications, and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is important.

The proposals shall be organized in the format listed below and shall be limited to thirty (30) pages (excluding attachments and appendices) on 8 ½ x 11 paper with all responses bound with tabs separating each section. Respondents shall read each item carefully and answer accurately to ensure compliance with WCS requirements. Failure to provide all requested information or deviation from the required format may result in disqualification.

A. Submittal Letter

Include the RFP's title and submittal due date, the name, address, and telephone number of the responding firm. Include a contact person and corresponding email address. The letter shall state that the Proposal shall be valid for a 60-day period and that the staff proposed is available immediately to work on this project. The person authorized by the firm to negotiate a contract with WCS shall sign the cover letter.

B. Description of Firm

This section should provide information regarding the size, location, nature of work performed, years in business and the approach that will be used in meeting the needs of WCS.

C. Organizational Structure

Describe your firm's organizational structure. Provide the names of the professionals who will be responsible for our project. Please provide brief resumes for these individuals.

D. References and Description of Experience

This section should identify similar projects that the firm has completed as outlined in the RFP. Use this section to indicate the areas of expertise of your firm and how that expertise will benefit WCS. Include at least three (3) school districts with similar demographics and student performance, along with the names of individuals familiar with your work that can be contacted by WCS staff.

E. Project Overview

This section should clearly convey the firm's understanding of the nature of the work related to strategic planning and the general approach that will be used to implement a strategic plan. This section should include, but not be limited to, a discussion of the organization of the project and a summary of the proposed approach.

F. Cost

This section must provide a full description of the expected expenditures for the work described in this RFP. Cost proposed must include all consultant fees, preparation of deliverables, travel expenses per trip to the Town of Willsboro (if applicable), printing, etc.

V. SELECTION CRITERIA

Firms submitting proposals are advised that all proposals will be evaluated to determine the firm deemed most qualified to meet the needs of WCS. The selection criteria will include, but not be limited to, the following items:

- A.** Demonstrated understanding and responsiveness to the Request for Proposals.
- B.** Proposals and experience of the firm and personnel named in the proposal.
- C.** Past experience assisting school districts in implementing strategic plans.

- D. Project understanding and approach including an understanding of the District.
- E. Satisfaction of previous clients. As noted in Section II.D above, provide at least three (3) references that reflect similar demographics and student performance, and are similar to the work contemplated in this RFP. Include the scope of work for each reference.
- F. Oral interview of team members assigned to complete our process.
- G. Completeness and quality of the proposal.
- H. Cost

VI. PROCESS FOR SELECTING FIRM

The Board of Education will evaluate and select those firms deemed to be the most highly qualified to perform the required services.

The Board of Education may choose to interview any, all, or none of the respondents as may be in the best interest of WCS. If interviews are held, selected firms will be notified as to place, time, date and purpose of the interview.

The names of all firms submitting proposals and the names, if any, selected for interview shall be public information. At the conclusion of the RFP process, the contents of all proposals become public information. Firms that have not been selected will be notified in writing after the conclusion of the selection process.

The District reserves the right to reject all proposals, to solicit for proposals, to waive any information in proposals received, and to accept any proposal deemed to be most favorable. Upon submission, all responses become the property of the Willsboro Central School District. The District reserves the right to use the information and any ideas presented in any submission in response to the RFP, whether or not the submission is accepted.

**VII. CONSULTANT SELECTION PROCESS AND PLAN DEVELOPMENT
ANTICIPATED TIMELINE:**

Receipt Deadline for Proposals:	June 21, 2021
Notify Finalists Selected for Interviews:	June 30, 2021
Interviews of Finalists:	Week of July 5-9, 2021
Committee selection of successful proposal:	Week of July 5-9, 2021
Consultant approved by Board of Education:	July 13, 2021
Consultant starts Development Plan:	October 1, 2021
Board of Education adopts Plan:	July 1, 2022