



REQUEST FOR PROPOSALS: STRATEGIC PLAN CONSULTING SERVICES

December 1, 2022

Overview

Capital IDEA seeks proposals from qualified consultants/firms to assist in the development of a new strategic plan to guide the organization over the next five years (2023-2028). The goal is to anticipate the challenges and opportunities Capital IDEA will face and build a forward-looking, actionable plan that will drive key strategies, impact areas, and decisions.

The plan will provide clarity for the board and staff on long-term, internal organizational efforts as well as high impact opportunities to support community-wide, mission driven workforce development efforts in partnership with external stakeholders.

Qualifications

Capital IDEA is seeking an experienced organizational consultant to work with the Executive Director, Board of Directors, senior management team, staff members and stakeholders. The consultant should have:

- Relevant experience in working with nonprofit, public, and/or private sector organizations to develop strategic plans that respond effectively to internal, environmental, political, and fiscal realities.
- Extensive strategic planning experience, including the ability to conduct all required research, coordinate and facilitate the planning process, conduct confidential internal and external stakeholder interviews, and create a strategic planning document that is measurable and suitable for public review and presentations.
- Experience working with strategies of the Industrial Areas Foundation or Central Texas Interfaith is preferred, as is experience with agencies that deliver impactful workforce development.

Organization History and Service Delivery

Created in 1998 through the efforts of Central Texas Interfaith (formerly Austin Interfaith) and the Central Texas business community, Capital IDEA is a non-profit organization whose mission is to lift working adults out of poverty and into living-wage careers through education and career advancement. Our long-term vision is that every motivated low-earning adult in Central Texas can succeed in a high-paying career through education. We are currently serving approximately 1,000 low-income adult students annually.

Our strategy is to solve two problems with one approach: lift families out of poverty and meet employer needs for a highly skilled and local workforce. We help adults with as little as a 5th grade reading/writing/math ability enter college and earn a two-year Associate Degree at a local community college, primarily Austin Community College, and enter employment into high demand careers that offer a living wage, benefits, and continued career pathway.

Capital IDEA funds participants' direct education expenses such as tuition, fees, supplies, and books, as well as a range of wrap-around support services, such as childcare, transportation, and emergency assistance. Most importantly, our participants receive career navigation at every step: choosing a career, navigating their chosen education program, and finding employment after graduation. The program is specifically designed to provide the financial and emotional support that non-traditional, adult learners need to succeed in higher education and ultimately reach self-sufficiency.

We believe education is a powerful way to break the cycle of poverty for working families in Central Texas and build intergenerational equity. With over 2,000 graduates placed in living wage careers over our 24-year history, our innovative program is proven to be effective. The University of Texas' Ray Marshall Center, under contract by Travis County to evaluate our impact, calculates that we provide a 501% return on investment to taxpayers over 20 years. Graduates triple their pre-Capital IDEA job earnings.

Detailed descriptions of our programs and services can be found on our website at www.capitalidea.org.

Our 2021 Annual Report, including demographics of clients served, can be found at www.capitalidea.org/published-2021-annual-report.

Current Context

Capital IDEA is wrapping up our 2015-2023 strategic plan, goals and objectives outlined below. Our founding Executive Director’s planned retirement in 2022, coupled with the volatile economic conditions during and post-pandemic, prompted a refresh and two-year extension of this existing plan from 2021 to 2023.

As with many businesses and non-profits, the pandemic did affect Capital IDEA. While finances remain strong, enrollment and retention metrics have been lower than average for the past two years. The affordability crisis in Central Texas coupled with low-skill jobs offering higher than average pay have made it difficult for our target audience to say yes to college today for long-term gains tomorrow.

From a training capacity standpoint, voters approved ACC’s 2022 Bond Proposition in the November 8, 2022 election. The \$770 million general obligation bond funds will go directly to projects in communities across Central Texas that increase training capacity for high-demand fields such as health care and advanced manufacturing. It would also include new sites in southeast and southwest Travis County. ACC is the primary training provider for Capital IDEA participants.

2021-23: GOALS AND OBJECTIVES

Scale Impact	Targeted Careers	Scale Support
<p>Reduce RN cycle time Goal 3.5 years Solidify Anatomy & Physiology Improve outcomes to B or better.</p>	<p>Scale the RN program “Double the Nursing Program” “Expand Dental Hygiene and others”</p>	<p>Local Public Funding City of Austin and Travis County Spring 2022 RFP/planning. Expanded Hays County funding Williamson County research</p>
<p>Outreach and Growth Modify plans considering the pandemic</p>	<p>Develop IT Career ACcElerator Expand to software coding Maintain 150 active at <u>2.5 year</u> cycle time</p>	<p>Maintain State Funding Continue support of ACE Grant Program at legislative level and with sister organizations</p>
<p>Continue growing grads Increase by 10/yr Ensure diversity of grads Reflect active students</p>	<p>Watch emerging careers Explore substantive <u>careers+funding</u> opportunities (e.g. Tesla, Samsung)</p>	<p>Maintain and increase support of \$1M+ private funders St. David’s Foundation Michael & Susan Dell Foundation</p>

Scope of Work

Capital IDEA has a budget of \$20,000 - \$30,000 for consultant work to help develop a new five-year strategic plan.

The final strategic plan should clearly articulate how Capital IDEA can be best positioned to continue its strong role as an innovative, collaborative, and impactful workforce development leader in Central Texas. The plan should outline near- to long-term priorities, necessary action steps, and measurement indicators for evaluation and tracking purposes. The plan should also

include a summary of critical issues facing Capital IDEA in its effort to meet the established goals, as well as recommendations for implementation and critical next steps in terms of capacity building efforts.

Capital IDEA anticipates a successful proposal would include, at a minimum, the following methodology:

- A comprehensive organizational assessment – including brief review of current strategic plan, mission, vision, values, and pertinent internal and external documents;
- An environmental scan / analysis of community needs;
- 20-25 confidential, one-on-one interviews with key stakeholders;
- 2-3 focus groups of staff, student participants, and other stakeholders;
- Task Force formation and facilitation to review information gathered;
- Process for annual review/refresh of strategic plan goals and objectives; and,
- Presentation of final strategic plan to Task Force and Board of Directors.

Deliverables

In addition to a written, comprehensive strategic plan, Capital IDEA seeks a proposal that includes, at a minimum, the following process and product deliverables:

- Project coordination, including regular meetings and status reports to keep the project on schedule and keep key stakeholders updated on the process;
- Community and employee engagement, including a summary of trends from key stakeholder interviews and focus groups;
- Process facilitation – assisting discussion and decision making and ensuring that conversations are progressive and innovative, and oriented towards creating a shared vision/future;
- Planning, coordinating, and taking notes of all meetings; and,
- Development of a final report for the project, including executive summary.

Guidelines for Proposal Development

Capital IDEA requests proposals of no more than five pages in length that describe:

- Your team and any key team members
- Your experience providing Strategic Planning Services to similar agencies
- Your proposed methodology and process for providing these services for Capital IDEA
- A narrative and timeline of the work to be conducted
- A proposed budget for these services. If necessary, please include your billing rate in the budget, the estimated hours for each activity, and any estimated out-of-pocket costs
- Contact information of up to three references for whom you have recently provided similar services

Evaluation and Timeline

Proposals will be accepted through January 3, 2023. Submitted proposals will be evaluated by a small committee of staff and board based on the following criteria:

- Experience of Primary Consultant and any Key Team Members – 25%
- Understanding of Organization and Long-term Vision – 25%
- Quality of Proposed Methodology and Deliverables – 25%
- Work Plan, Schedule, and Cost – 25%

To the extent possible from available vendors offering cost-competitive services, Capital IDEA is committed to seeking bids from and doing business with minority, veteran, LGBTQ, and/or women owned small businesses. Please include if your business falls into one or more of these categories.

The top candidate will be invited to present to the committee in January. A final decision will be communicated by February 1, 2023. Capital IDEA intends to begin the contracted services in March 2023 and anticipates the process to take approximately six months to complete. The goal is to have the plan ready for board vote at the Annual and Regular Board Meeting on September 22, 2023.

Bidder Instructions, General Conditions, and Questions

Consultants are to provide an electronic proposal (PDF preferred) via email to the contact listed below by 11:59pm on January 3, 2023.

Bidders may submit RFP questions via email until 11:59pm on Monday, December 12, 2022 to the contact listed below. All questions will be answered and posted in entirety to the Capital IDEA website by 5:00pm on Tuesday, December 13, 2022.

Submit questions and proposals to:

Alyssia Palacios-Woods
Executive Director
apalacioswoods@capitalidea.org

Proposals must be prepared in accordance with the conditions outlined. Failure to do so may result in disqualification. All costs related to responding to this RFP are the responsibility of the consultant/firm. For additional information or clarification, contact Alyssia Palacios-Woods at the contact information provided above.