

**Request for Proposal
Friends For Life Strategic Plan**



***Friends For Life wishes to contract for the development of a
Five-Year Strategic Plan 2012-2017 including Business Plan, Facilities Plan and
Development Plan.***

Proposals due **3/5/2012**
Proposals should be sent electronically to:
Kim Daugherty at
Kim.daugherty@friendsforlifecorp.org

I. INTRODUCTION

Friends For Life wishes to contract the services of a consultant to develop a Strategic Plan for the agency. Friends For Life Corporation is one of the oldest and most comprehensive AIDS service organizations (ASO) in the southern United States and the only ASO in the entire Mid-South. The mission of Friends For Life is to help people affected by HIV/AIDS live well. The 35-member staff is reflective of the population it serves with 68% of them being African American and 41% being people living with HIV/AIDS. The majority (88%) of the over 2,250 persons who receive services from Friends For Life are African Americans with 67% of the total served being male.

The programs of the organization are divided into two main divisions: the Wellness Program and Aloysius Home Housing Services.

The Wellness Program encompasses the supportive services focused on medical adherence including food pantry, case management, HIV prevention services, HIV testing, early intervention services, emergency financial assistance, psychosocial services, dental services and the Positive Living Center holistic services and drop-in center. Other supportive services include transportation assistance, support groups, congregate meal program and certified on-site pharmacy. We also have an award winning program, The Wellness University, which is a comprehensive educational program that provides medication adherence training, healthy life skills building and personal empowerment training.

The Aloysius Home Housing Services offer housing and housing assistance through four separate programs. Homelessness prevention services include tenant based rental assistance which provides transitional housing assistance for up to two years as well as a short-term rent, mortgage and utility assistance program which provides financial assistance to decrease homelessness. Permanent supportive housing is provided in two separate programs; Shelter Plus Care, which is implemented in a 16-unit agency owned apartment building, and Aloysius New Beginnings which is currently under construction and will provide permanent supportive housing to 10 chronically homeless persons living with HIV/AIDS also in an agency-owned building.

The Agency has a diverse and growing population, people who are served by a Board of Directors – Executive Director with a 5 person Leadership Team form of management. The successful applicant must have extensive organizational strategic planning experience, as well as the capability to facilitate with all stakeholders including but not limited to consumers, staff, Board of Directors, Leadership Team, donors, volunteers and funders and conduct research. The successful firm will have demonstrated their ability to meet these requirements.

II. BACKGROUND

In May 2008, Friends For Life hired Kim Daugherty as the new Executive Director. Under her leadership, the Administration experienced a culture change that focused on enhancing customer service and increasing accountability. In July 2008, the Board of Directors lead by the Strategic Planning Committee developed a Strategic Plan for 2009-2012, which was completed during 2008-2009 then updated in 2011. The 2009-2013 Strategic Plan identified five basic focus areas for the Agency:

- I. To provide the most comprehensive and results-oriented HIV/AIDS services and programs in the Mid-South
- II. To be financially secure
- III. To have the most professional, engaged, and compassionate associates
- IV. To actively promote the Agency, and its services/pro-grams, as the HIV/AIDS service organization of choice
- V. To be the role model non-profit Agency

As the agency continues to grow we would like to spend the time and resources to complete a more comprehensive strategic plan including but not limited to the following:

- I. Business Plan
- II. Development Plan
- III. Facilities Plan

III. PURPOSE OF THE REQUEST

The purpose of the Friends For Life Strategic Plan RFP is to develop an organizational strategy that outlines five-year goals and objectives for the Agency, as well as outlines how the Agency can successfully reach these goals. The Agency 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 the Agency to complete its organizational and programmatic goals.

IV. SCOPE AND METHODOLOGY

The strategic plan proposal 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. Consultant must demonstrate that they have an understanding of the magnitude and importance of each task. Tasks should be organized into phases that have measurable deliverables.

The scope of work, at minimum should include:

• ***The Development of a Strategic Plan, Business Plan, Development Plan and Facilities Plan Document:*** Using a five year time horizon using fiscal years July 1-June 30, the Strategic Plan developed by the selected consultant should use mission/vision/goals/focus areas, which are determined as a starting point of the strategic planning process. Furthermore, the process should further identify desired

objectives, activities, and required resources for each of the agreed focus areas. It may also be useful to develop value statements for each project and/or department.

- **Developing a Methodology:** The Strategic Plan should include methods (including strategy and specific actions, with first steps) to accomplish goals in all focus areas. The Plan should also include actions to enhance the success of the responsible department or agency for each goal by having short, medium, and long-term strategies. This will enable the department or agency to experience and report quick successes.

The Strategic Plan should include a summary of critical issues facing Friends For Life in its effort to meet the goals set forth in the plan, a list of volunteers willing to take on roles and tasks on behalf of the Agency, as well as available resources that can be utilized.

- **Community Participation Program and Utilize Techniques to Enlist Community Partners:** Agency consumers, staff, Board of Directors, Leadership Team, donors, volunteers and funders will likely have a number of ideas and possible missions, visions, and goals for the Agency. However, the likelihood of achieving success must be a critically important standard for inclusion in the strategic plan. It is expected that all stakeholders will be given the opportunity to provide input in written and verbal format.

- **Final Report:** The consultant will make any recommendations to the Draft Plan after review and approval by the Board of Directors Executive Committee and prior to submittal to the Friends For Life Board of Directors. (10) copies of the Draft Plan and all exhibits shall be produced for distribution. The Consultant may be required to make changes to the submitted draft after the Board of Directors' reviews. The plan inclusive of any required changes will become the final and published plan. This document and any supporting documents should be produced in both paper and digital formats.

V. PROPOSAL CONTENT

Proposals should include the names of the firm and all individuals who will work on the project, experience record for each individual, and examples of past similar work. Three references connected to recent projects should be provided.

Proposal should include specific descriptions of how the work would be carried out, proposed tasks and activities, and proposed involvement or resources to be provided by the Friends For Life. A budget breakdown should be provided that details the intended time commitment of each team member.

VI. BUDGET

As a non-profit Agency, Friends For Life has limited resources available to devote to this project. Achieving good value for our expenditure will be important factor in assessing proposals.

VII. PROPOSAL TIME LINE

Deadline for proposals is March 5, 2012. They should be sent electronically to:

Ms. Kim Daugherty, Executive Director at:

Kim.daugherty@friendsforlifecorp.org

1. Contract award March 23, 2012.

2. Draft report due May 14, 2012.
3. Final report due May 28, 2012.
4. Presentation of the above report to the Friends For Life Board of Directors, in June 2012 (exact date to be determined).

VIII. PROPOSAL EVALUATION

Proposals will be evaluated using the following criteria and point system:

- Relevant background of consulting team 40
- Methodology complete/appropriate 25
- Quality of communication/presentation 15
- Cost 20
- Total points available 100