REQUEST FOR PROPOSALS
FOR STRATEGIC VISIONING
AND PLANNING: 2020-2025

Quincy Asian Resources, Inc.

November 2019

PURPOSE

Quincy Asian Resources, Inc. (QARI) has initiated a Request for Proposals (RFP) process to identify a qualified vendor to guide and execute a strategic visioning and comprehensive planning process. This process will engage a range of stakeholders through interviews, focus groups, surveys, and community research to better understand where QARI’s strengths are and how the organization can continue to evolve to address gaps in services for our clients.

WHO MAY RESPOND

QARI seeks a consultant who has demonstrated experience in successfully developing consensus-based strategic plans, has strong facilitation skills, has proven experience with nonprofit strategic planning, and a strong understanding of the structure and purpose of community-based service agencies.
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1. About the Organization

In 1998, prompted by the United Way of Massachusetts Bay seeking to invest in communities of color to develop new service agencies, and with the support of the City of Quincy, Sheri Adlin, Rosemary Walberg and Beth Ann Strollo (former and current executive directors of Quincy Community Action Programs), Peter Jae (Chinese school teacher and activist), Betty Yau (Yau’s Marketing and activist), Mary Sweeney (Vice President of Strategic Services at Quincy Medical Center), and Tackey Chan (Current State Representative and Former Quincy Asian American Association President) agreed to form the Quincy Asian Collaborative (QAC).

This led to over 30 meetings held over 3 years with Asian and non-Asian community members, South Shore human service agencies and city government. The QAC discovered that Quincy’s Asian residents were not maximizing utilization of existing services and that there were service needs not being fulfilled. The QAC concluded that a new not for profit needed to be formed to provide services not currently being provided (“fill gaps”) and to provide information and referrals for Asians to local services. The report was provided to the United Way of Massachusetts Bay, which approved a 3 years grant to fund an agency. Through the work of the QAC they were able to receive an additional 3 year grant from the Harold Brooks Foundation. On November 20th, 2001 Quincy Asian Resources, Inc. (QARI, pronounced as ‘quarry’) was incorporated. Quincy Asian Resources, Inc. is a collaborative effort of community leaders, South Shore service agencies and city and state government. This “three legged” model supports the entire Asian community and continues to do so today.

Since then QARI has developed a broad array of services to serve this population: we provide multilingual information and referrals, adult education, workforce enterprise initiatives, youth programs, and organize city-wide cultural events to the benefit of Quincy and its diverse newcomer population.

QARI Mission Statement:

QARI’s mission is to foster and improve the social, cultural, economic and civic lives of immigrants and their families in order to benefit Quincy and its neighboring communities. Through collaborations and partnerships, we provide culturally competent services, such as workforce development, adult education programs, youth development, and cultural events as well as information and referrals to public or other community organizations.
2. Project Overview

QARI is governed by a 15-member Board of Directors, led by a 4-member Executive Committee who work closely with the President and Chief Executive Officer. QARI currently employs 9 full-time staff, along with 4 part-time staff and 8 Adult Education teachers. QARI additionally has three Advisory Committees - Healthcare, Workforce & Education, and Youth Advisory - to advise the Board and staff on each program area.

Since 2017, QARI has undergone significant staff changes and growth of programs - both in services offered and geographic areas served. Workforce Enterprise programs were launched in 2018, which has led to new community and corporate partnerships across Massachusetts (Quincy, Randolph, Lowell, Merrimack Valley) and in New York City.

As QARI’s programs and vision have expanded in recent years, we now seek to expand and sharpen our mission and enhance the sustainability of QARI’s impact, funding, and leadership. QARI is looking towards the next five years to better engage our clients and understand areas for strategic growth and improvement across all program areas, in the new communities we serve, and organizationally.

To accomplish this, QARI is seeking a consultant to engage the Board of Directors and key stakeholders - including staff, clients, volunteers, and community members - in a strategic planning process to clarify our vision for the future and develop actionable priorities for the growth of the organization through 2025. This will include both three- and five-year plans to develop short and long term goals for the organization.

3. Scope of Work and Deliverables

A successful completion of the project shall deliver the following:

1. A broad strategic vision for QARI that aligns with the organization’s mission and positions it for long-term success
2. An actionable, multi-year strategic plan that fulfills the vision, including a core business portfolio, a high-level financial sustainability plan, and an implementation roadmap
3. Recommendations regarding QARI’s governance and organizational structure that is required to successfully execute the strategic plan
4. Completion of the above deliverables in close engagement with the QARI board and stakeholders to ensure an optimized, consensus-driven outcome
5. Project management that supports efficient execution of the engagement
It is expected that strategic planning tasks will be accomplished through a combination of activities, including:

- Background research by consultant on QARI’s history and leadership team, including environmental scan of organization and opportunities ahead;
- Benchmarking QARI with other similar sized nonprofits or organizations with a similar focus and that work with similar demographic groups;
- Focus groups, interviews, surveys, and/or any other method that will be useful in receiving partner and community input; and
- Facilitating group meetings with Board of Directors and staff to create consensus regarding a strategic vision and plan

Six priority areas have been identified by QARI leadership in previous planning efforts, to be reexamined and expanded on for the next 3- and 5-year periods, including:

- Leadership
- Organization Operational Effectiveness
- Outreach
- Financial Management
- Programs & Services
- Fundraising & Business Development

**Including capital fundraising to procure additional permanent locations**

Beyond the above areas, we envision the scope of work being completed in several stages.

- Stage 1 - Discovery: Determine Vision and Key Goals with Board
- Stage 2 - Research and Validation: Needs Assessment, Gap Analysis, SWOT Analysis, Research on Organization and Targeted Geographic Communities
- Stage 3 - Identify Strategic Goals: Draft Strategic Plan & Budget
- Stage 4 - Implementation roadmap of Recommendations

Expected outcomes from the totality of the strategic planning process include clarifying QARI’s mission and strategic direction; identifying client needs and service gaps in different communities (Quincy, Randolph, Lowell, Merrimack Valley, New York City, and other potential service areas); setting organizational priorities; evaluation of Board

**4. Proposal Requirements**

A successful proposal shall include the following required responses:

- Why you or your organization is interested in this engagement
- Examples of similar projects you have delivered
- Your approach to strategic planning
- A summary of strategic planning experience
• Suggested project timeline with major tasks and milestones
• Sample project plan
• Project budget by line item
• Identify who will be involved on your project team, their role, and include their relevant experience
• Three client references

General Information
QARI understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in the project. If a consultant group or partnership of consultants, the proposal should indicate who will serve as the point person.

Consultant Qualifications and Roles
The proposal must describe the consultant’s qualifications to conduct the RFP scope of work activities, expertise, knowledge, and experience, particularly when working with immigrant communities and in the identified geographic areas. Experience should include examples of conducting similar or related work (i.e., working with other collaborative initiatives to create a strategic vision and strategic plan), as well as experience working with nonprofits, local government agencies, gateway communities, and regional development organizations.

To accomplish the scope requested, the consultant will need to possess the following qualifications:
• Experience at successfully developing consensus-based strategic plans
• Knowledgeable of collective impact or collaborative strategic initiatives
• Strong facilitation skills
• Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
• Experience at gathering and utilizing data to inform the strategic planning process
• Knowledge of budgeting
• Knowledge of marketing, communications and branding
• Knowledge of resource development
• Ability to constructively challenge key stakeholders
• Experience inspiring others to think innovatively
• Project management experience

Proposals should include:
• Demonstrated understanding of the work to be performed, estimated hours, and other pertinent information.
• Organization description, size, and structure. Indicate whether the firm is a small or woman- or minority-owned business.
• Qualifications of all staff to be assigned to the project; please specify the project manager to be the point person for the duration of the project.
• Resumes of staff to be assigned to the project. Education, position in firm, years and type of experience, continuing professional education, etc. will be considered.

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

**Work Plan**
The proposal should contain a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:
• the specific activities to be conducted at each stage (i.e. interviews, focus groups, board retreat),
• a timeline for the activities at each stage,
• milestones and deliverables tied to those activities,
• a detailed budget for each task, along with a proposed payment schedule tied to project milestones and/or deliverables, and
• metrics for evaluation of implementation over one, three, and five years.

**Budget**
The proposal should include a budget summary that includes:
• Itemization of different types of spending (e.g., time vs. material)
• A high-level budget schedule that corresponds to the project timeline and resource commitment, including hourly rates of key consultants
• A do-not-exceed amount

**References**
The proposal should include at least three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number and email address.

**Previous Work Product**
The proposal should include at least two examples of written work similar to the scope of work requested within this RFP (e.g., strategic plan).
5. Timeline

QARI’s project timeline for the strategic planning process is:

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2019</td>
<td>Request for Proposals released</td>
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<tr>
<td>February 2020</td>
<td>Complete RFP review and selection process</td>
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<tr>
<td>April 2020</td>
<td>Develop and launch strategic planning process</td>
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<tr>
<td>September 2020</td>
<td>Complete research, interviews, focus groups, surveys, board retreat</td>
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<tr>
<td>November 2020</td>
<td>Release final 2025 strategic plan in coordination with Annual Meeting in mid-November 2020</td>
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<tr>
<td>January 2020</td>
<td>Implementation of strategic plan recommendations</td>
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6. Ownership and Confidentiality

All intellectual property will become the property of QARI. All data remains the sole property of the organization. The vendor shall further agree to keep information related to any and all contracts with QARI in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with us.

7. Scoring

Proposals will be reviewed and evaluated based on the following criteria:

Qualifications
- The consultant has the qualifications necessary to successfully complete the scope of work.
- The consultant has prior experience working on similar projects.
- The consultant has prior experience working with similar organizations (i.e. community-based agencies, immigrant populations)

Scope of Proposal
- The proposal demonstrates an understanding of the project objectives and desired results.
- The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan.
• The proposal illustrates the consultant’s ability to successfully execute the proposed approach.
• The proposal includes an appropriate process to interact with committee members.

Work Plan
• The proposal adequately details project activities and milestones, or deliverables associated with each stage of the scope of work.
• The proposal includes a detailed timeline for each stage.
• The work can be completed within a reasonable project timeline.

Budget
• The proposal includes a detailed budget for each stage of the scope of work.
• Proposed costs are reasonable

8. Process for Proposal Submission

Proposals must be submitted by 5:00pm EST on Thursday, December 19, 2019. Please submit proposals and supporting documents in PDF format via email to Emily Canner, Strategic Relations & Communications Specialist, emilycanner@quincyasianresources.org. Late arrivals and mail submissions will not be accepted.

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by QARI. Any inquiries regarding this RFP should be directed to Emily Canner, emilycanner@quincyasianresources.org.

9. Application Selection

QARI will select the proposal which it feels will deliver the highest quality deliverable at the best value; price will be a significant, though not the only, criteria in evaluating proposals. Proposals will be initially reviewed by QARI’s President & CEO. Final selection of vendor will be made by the Board of Directors’ Selection Committee with input from the President & CEO.

The award will be made to the qualified bidder whose proposal is most advantageous to QARI with price and other factors considered. QARI, in its sole discretion, may request proposal presentations by meeting with any or all bidders to clarify or negotiate modifications to proposals. However, QARI reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the bidder can propose. QARI contemplates award of the contract to the responsible bidder with the most cost-effective solution and demonstrated capabilities to perform the contract services.
Contact Information
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