



## **Mission Statement**

*Working together with individuals, families,  
and communities to provide resources for a better life.*

## **Vision Statement**

*MountainHeart Community Services, Inc. embraces our role as the leader  
in providing pathways of opportunities for all to hold the power for their  
own success in achieving an enriched quality of life.*

**REQUEST FOR PROPOSAL**

**November 13, 2020**

# MountainHeart Community Services, Inc.

## Request for Proposals (RFP)

MountainHeart Community Services, Inc., a private, non-profit 501 © 3 Community Action Agency, is seeking a Facilitator to conduct Strategic Planning sessions with a diverse group of MountainHeart Community Services staff and MountainHeart Community Services Board members.

*Due to the COVID 19 pandemic we are currently observing all safety precautions, as recommended by the CDC and other Health officials and therefore the planning sessions **must be conducted virtually** through a venue such as TEAMS or ZOOM.*

Pre-determined dates for the virtual Strategic Planning sessions will be:

January 19, 2021	½ day session	1:00 to 4:30
January 20, 2021	full day session	9:00 to 4:30
January 21, 2021	full day session	9:00 to 4:30
February 26, 2021	½ day session	1:00 to 4:30

### The successful Facilitator will:

#### ➤ Have knowledge of:

- The purpose and mission of Community Action locally and nationally
- The vision and mission of MountainHeart Community Services, Inc.
- CSBG (Community Services Block Grant) funding
- The National Performance Standards
- Community Action ROMA (Results Oriented Management and Accountability) goals:

Goal 1: Individuals and families with low incomes are stable and achieve economic security

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity

Goal 3: People with low incomes are engaged and active in building opportunities in communities

### The successful Facilitator will:

- Present a brief, written plan and agenda, including breaks, for facilitation of all sessions
- Present energizing and motivating sessions. Utilize methods to generate new ideas. Encourage participants to consider the possibilities of new perspectives. Link all SP goals to ROMA, the National Performance Standards and the Vision and Mission Statements of MountainHeart Community Services. Keep participants on task.
- Review and utilize data from the recently completed Community Needs Assessment
- Compile and organize all information, stated goals and feedback collected from the participants attending the Strategic Planning sessions
- Submit, via email, a draft SP to the MountainHeart CEO and participants for the scheduled review and comment period. All comments from the review period will be emailed to the Facilitator.
- Plan a half day virtual session with participants to review the draft version of the SP and solicit any final changes or comments
- Compile all final comments and integrate, as necessary, into the final SP
- Provide, via email, the completed Strategic Plan to the Chief Executive Officer at MountainHeart Community Services, Inc. on or before 4:30 PM, Monday, March 15, 2021

## **MountainHeart Strategic Plan Time Line 2020 - 2021**

Friday November 13, 2020	RFP to go out
Friday, December 4, 2020	Deadline for RFP submissions 4:30 PM
Wednesday, December 9, 2020	Announcement of Strategic Plan Facilitator
Tuesday, January 19, 2021	Virtual Strategic Planning 1:00 to 4:30
Wednesday, January 20, 2021	Virtual Strategic Planning 9:00 to 4:30
Thursday, January 21, 2021	Virtual Strategic Planning 9:00 to 4:30
Tuesday, February 16 – 22, 2021	Draft Version of the SP submitted to participants for review and comment period
Friday, February 26, 2021	Virtual review meeting of draft with SP participants 1:00 to 4:00
Monday, March 15, 2021	Final Version of Strategic Plan submitted via email to MountainHeart CEO

### **To Apply to the MountainHeart Request For Proposal (RFP)**

- ✓ Respond to the RFP, via email, to [Margaret.A.Younce@wv.gov](mailto:Margaret.A.Younce@wv.gov) on or before 4:30 PM on Friday, December 4, 2020.

Subject Line on email should state: MountainHeart SP RFP

*Submissions received after this deadline will not be considered.*

### **The following information must be included in your response:**

- ✓ A brief, written plan and agenda for facilitation of all virtual sessions
- ✓ Contact information: Phone number, email address, mailing address
- ✓ A personal bio, listing all experience with Strategic Plan facilitation
- ✓ Two professional reference statements of participants who have been part of Strategic Planning sessions you have facilitated. Please include their current, daytime phone numbers and email addresses.
- ✓ A proposed budget to facilitate the MountainHeart virtual Strategic Planning sessions including all services to successfully complete the written SP. Include the cost breakdown for each service performed.
- ✓ A list of any relevant experience you have with Community Action Agencies such as a volunteer, SP Facilitator, employee or community partner.
- ✓ List any experience you have conducting or attending virtual meetings using a venue such as TEAMS or ZOOM
- ✓ A copy of a W 9. If not currently available, a W9 must be presented prior to receiving payment from MountainHeart Community Services, Inc.

The successful Strategic Planning Facilitator will be notified by Wednesday, December 9, 2020

Staff of the MountainHeart IT Department will contact the successful SP Facilitator and provide technical assistance in preparation for the selected virtual venue.

Please direct any questions, via email, to [Margaret.A.Younce@wv.gov](mailto:Margaret.A.Younce@wv.gov) prior to December 4, 2020.