



New Hampshire

# Department of Education

**STATE OF NEW HAMPSHIRE  
DEPARTMENT OF EDUCATION**

**REQUEST FOR PROPOSAL  
STRATEGIC PLANNING**

**RFP 2023-VR-STRATEGIC PLANNING**

**10/26/22**

The New Hampshire Department of Education does not discriminate on the basis of race, color, religion, marital status, national/ethnic origin, age, sex, sexual orientation, or disability in its programs, activities, and employment practices. This statement is a reflection of the Department of Education and refers to, but is not limited to, the provisions of the following laws: Title IV, VI and VII of the Civil Rights Act of 1964-race color, national origin, The Age Discrimination in Employment Act of 1967, The Age Discrimination Act of 1975, Title IX of the Education Amendments of 1972 (Title IX)-sex, Section 504 of the Rehabilitation Act of 1973 (Section 504)-disability, The Americans with Disabilities Act of 1990 (ADA)-disability, and NH Law against discrimination (RSA 354-A).

Auxiliary aids and services are available upon request to individuals with disabilities.

## Section 1 – Overview and Schedule

### A. Executive Summary

The New Hampshire Department of Education, Bureau of Vocational Rehabilitation (bureau) seeks proposals from qualified strategic planning firms or contractors (vendors) to lead the bureau through a comprehensive strategic planning process in 2023. This process will define the future of the bureau’s work and enhance the dual missions of the bureau: assisting individuals with disabilities in obtaining and maintaining competitive, integrated employment and assisting business partners with services to meet their workforce needs.

The plan will define the new “goals and priorities” of the bureau that will align and be incorporated into the new federally required “Combined State Plan” that will be due in March of 2024 to the federal government. The plan will create a map forward for the bureau that will be feasible and future oriented. It will identify objectives and strategies for our future programming, facilities, leadership, community engagement, staffing models, and performance and outcome achievement.

### B. Schedule

The following table provides a Schedule of Events for this RFP through contract finalization and approval. The Agency reserves the right to amend this Schedule at its sole discretion and at any time through a published Addendum.

EVENT	DATE	LOCAL TIME
RFP Released to Proposers (Advertisement)	10/26/22	
Proposer Inquiry Period Ends	11/9/22	4:30 PM
Final Agency Responses to Proposer Inquires	11/16/22	4:30 PM
Proposers Submit Proposals	12/9/22	4:30 PM
Estimated Notification of Selection and Begin Contract Negotiations	12/16/22	
Estimated Governor & Council Approval	February 2023	

The State reserves the right to alter this schedule at any time by posting an addendum to the same web site that contains this RFP. The State will not attempt to contact bidders regarding the posting of schedule changes. It is the responsibility of each bidder to visit the RFP web site regularly to obtain any alterations.

## **Section 2 - Description of Agency/Program Issuing the Request for Proposals**

Vocational Rehabilitation New Hampshire (VRNH) is a state agency that receives federal and state funding to provide rehabilitation services to assist individuals with disabilities in obtaining and maintaining employment as a part of the larger workforce system. The core partners of the workforce system are guided by a combined state plan, wherein, VRNH has specific required sections that identify goals, priorities and other performance related components. Vocational Rehabilitation Counselors provide guidance and counseling to guide participants through the VR process. The program can assist individuals obtain assessments, training, job development and placement and many purchased services to enhance career pathway employment opportunities. In addition, the program works with business partners to fulfill their hiring needs and develop new collaborations to advance the hiring, training, and retaining of individuals with disabilities. The agency has approximately 29 Rehabilitation Counselors statewide with a total of approximately 75 total staff.

The bureau has experienced several critical challenges over the last years including entering an order of selection, Covid-19, staffing shortages, and moving to paperless case management. At this juncture we need to evaluate our mission, goals, successes, and challenges, to formulate strategic directions and goals for the future.

In developing this plan, the vendor selected for this project will be expected to: guide the bureau in implementing a sound strategic planning process, establishing its strategic planning team, conducting interviews, and facilitating all working sessions with the team and any other key SRC members and staff members. Based on the process and any data collected, specific goals will be identified and, ultimately, the vendor will develop a final strategic plan that provides the bureau with clear objectives and action steps that lead to achieving organizational goals, including, where possible, a timeline. The strategic plan will also include information on effectively monitoring progress and how and when the bureau should reassess goals, objectives, and action steps to make sure that they are still relevant and reflect environmental changes that may impact the bureau's ability to implement the plan and recommendations.

Included in the work:

- Information gathering in preparation for strategic planning session (which may include key stakeholder/SRC interviews and/or stakeholder/SRC survey);
- Review of recent Comprehensive Statewide Needs Assessment and customer satisfaction surveys
- Agenda development in collaboration with bureau project lead(s);
- Preparation of handouts and support materials;
- Facilitation of 3-day in-person (virtual if needed) sessions tentatively set for late February; and
- Preparation of follow-up materials from the session, including a four-year strategic plan and one-year work plans broken down from the four-year plan.

### **Section 3 – Proposed Scope of Work**

Work with a Strategic Planning Team to articulate a clear strategic plan for PYs 2023-2026 (July 1, 2023– June 30, 2027).

- This plan should use the bureaus renewed vision, mission, and values statements developed as part of the development process as the framework for the plan.
- The plan should galvanize these statements, as well as specific strategies for providing quality services to our customers, communication, programming, and vendor management through specific objectives for the organization to pursue over the next four (4) years.

#### **Deliverables Include:**

1. Assessment activities include researching existing data including:
  - Completed Comprehensive Statewide Needs Assessment 2022 and completed Customer satisfaction surveys that cover fiscal years 2020 and 2021
  - Outreach to key stakeholders of the bureau (SRC, Staff, and other Key Partners) with appropriate research instruments to evaluate the bureau’s success in achieving its mission and goals over the past four (4) years and conduct a SWOT (strengths, weaknesses, opportunities, threats) analysis of internal and external perceptions of the organization.
2. Develop a timetable of implementation with specific measurable benchmarks, objectives, and tasks to be accomplished to achieve goals. Identify clear, measurable outcomes for how to gauge organizational and strategic effectiveness, impact, and success.
3. Establish a framework and process for the organization’s leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
4. Facilitate all meetings and provide leadership, direction and expert consultation and advice related to the development of an effective and implementable strategic plan.
5. The final deliverable should be a clear, easily understandable, strategic planning roadmap, accompanied by a strategic planning timeline, implementation, and evaluation methodology.

Specific areas that need to be addressed in the creation of a Four (4) year strategic plan include but may not be limited to:

- An environmental scan that examines internal and external opportunities and perceptions impacting the organization’s ability to achieve mission.
- A thorough assessment of infrastructure needs including, but not limited to, physical plant, technology, human capital, and financial resources.
- The development of a sustainable financial and programmatic model to achieve goals.

The bureau is seeking proposals from vendors who can provide all the above stated services and who can provide additional expertise to help the organization achieve a successful strategic planning outcome.

While the bureau understands that completing this project requires significant and active staff involvement, it is important to note that the candidates selected will be responsible for completing all project work products and final deliverables (e.g., writing organizational assessments, writing the actual strategic plan, etc.).

Proposals should include which aspects of the project will require staff involvement and include the expected time requirements for all activities involving their participation.

Proposals must include a clear description of the vendor's plan to complete all of the project components (i.e. in what order will the projects be completed, how long each component will take to complete, etc.)

Vendors must utilize a zoom platform for any remote/virtual meetings. Zoom is the most accessible platform for our staff.

Vendors must include in their project timelines "check-in" points for the bureau to be provided with project status updates. The successful vendor will be responsible for setting up the check-in meetings/calls, providing work product/deliverables to the bureau and dissemination to key team members in advance of these check-in points, preparing an agenda for each meeting/call, sending out meeting invites and writing meeting minutes.

In addition to the check-in meetings and/or conference calls, the vendor will be expected to present a status update on the preliminary findings and recommendations prior to writing the final project deliverables and strategic plan.

The bureau will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected will provide the organization with ongoing coaching and implementation support as needed through the end of the contract.

## **Section 4 – Process for Submitting a Proposal**

### **A. Proposal Submission, Deadline, and Location Instructions**

Proposals submitted in response to this RFP must be received by the Bureau of Vocational Rehabilitation, no later than the time and date specified in the Schedule section, herein.

Proposals may be submitted via Email to: [lisa.k.hatz@doe.nh.gov](mailto:lisa.k.hatz@doe.nh.gov) and [william.g.gaffney@doe.nh.gov](mailto:william.g.gaffney@doe.nh.gov) with a cc to: [Christine.A.Langille@doe.nh.gov](mailto:Christine.A.Langille@doe.nh.gov)

Proposals must be clearly marked as follows:

**STATE OF NEW HAMPSHIRE  
RESPONSE TO RFP 2023-Strategic Planning  
Vocational Rehabilitation Strategic Planning**

Unless waived as a non-material deviation in accordance with Section 6B, late submissions will not be accepted and will be returned to the proposers unopened. Delivery of the Proposals shall be at the Proposer's expense. The time of receipt shall be considered when a Proposal has been officially documented by the Agency, in accordance with its established policies, as having been received at the location designated above. The Agency accepts no responsibility for mislabeled mail or mail that is not delivered or undeliverable for whatever reason. Any damage that may occur due to shipping shall be the Proposer's responsibility.

All Proposals submitted in response to this RFP must be electronically sent to [lisa.k.hatz@doe.nh.gov](mailto:lisa.k.hatz@doe.nh.gov) and [william.g.gaffney@doe.nh.gov](mailto:william.g.gaffney@doe.nh.gov) with a cc to: [Christine.A.Langille@doe.nh.gov](mailto:Christine.A.Langille@doe.nh.gov).

Proposers who are ineligible to bid on proposals, bids or quotes issued by the Department of Administrative Services, Division of Procurement and Support Services pursuant to the provisions of RSA 21-I:11-c shall not be considered eligible for an award under this proposal.

**B. Proposal Inquiries**

All inquiries concerning this RFP, including but not limited to, requests for clarifications, questions, and any changes to the RFP, shall be submitted via email to the following RFP designated Points of Contact:

TO: Lisa Hinson-Hatz at [Lisa.k.hatz@doe.nh.gov](mailto:Lisa.k.hatz@doe.nh.gov) and [Christine.A.Langille@doe.nh.gov](mailto:Christine.A.Langille@doe.nh.gov)

CC: Bill Gaffney at [William.G.Gaffney@doe.nh.gov](mailto:William.G.Gaffney@doe.nh.gov)

Inquiries must be received by the Agency's RFP Points of Contact no later than the conclusion of the Proposer Inquiry Period (see Schedule of Events section, herein). Inquiries received later than the conclusion of the Proposer Inquiry Period shall not be considered properly submitted and may not be considered.

The Agency intends to issue official responses to properly submitted inquiries on or before the date specified in the Schedule section, herein; however, this date is subject to change at the Agency's discretion. Individual responses will not be sent to inquiries. All inquiries will be summarized and posted on the websites sharing the RFP. The Agency may consolidate and/or paraphrase questions for sufficiency and clarity. The Agency may, at its discretion, amend this RFP on its own initiative or in response to issues raised by inquiries, as it deems appropriate. Oral statements, representations, clarifications, or modifications concerning the RFP shall not be

binding upon the Agency. Official responses by the Agency will be made only in writing by the process described above. Vendors shall be responsible for reviewing the most updated information related to this RFP before submitting a proposal.

**C. Restriction of Contact with Agency Employees**

From the date of release of this RFP until an award is made and announced regarding the selection of a Proposer, all communication with personnel employed by or under contract with the Agency regarding this RFP is forbidden unless first approved by the RFP Points of Contact listed in the Proposal Inquiries section, herein. Agency employees have been directed not to hold conferences and/or discussions concerning this RFP with any potential contractor during the selection process, unless otherwise authorized by the RFP Points of Contact. Proposers may be disqualified for violating this restriction on communications.

**D. Validity of Proposal**

Proposals must be valid for one hundred and eighty (180) days following the deadline for submission of Proposals in Schedule of Events, or until the Effective Date of any resulting Contract, whichever is later.

**Section 5 - Content and Requirements for a Proposal**

Proposal shall follow the below format and provide the required information set forth below:

1. Table of Contents. A table of contents will allow the Selection Committee to easily access different information within the document.
2. Glossary of Common Terms. The glossary will share technical terms and acronyms.
3. Company Profile/Background. Please share an overview of the company including number of years in business, number of employees, location(s), expertise, local presence, etc.
4. Work Plan with Timelines.
5. Key Personnel. Please share resumes of key personnel that would be working on this project.
6. Examples of previous strategic plans for similar organizations
7. References. Please share three references that the agency can utilize to determine the satisfaction of previous, similar work. VR agencies from other states would be preferred.
8. Comprehensive budget **sent in a separate document** to include the following information:

Item	FY23 (2/1/23-6/30/23)	FY24 (7/1/23-2/28/24)	Total
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**Section 6 – Evaluation of Proposals**

**A. Criteria for Evaluation and Scoring**

Each responsive Proposal will be evaluated and considered with regard to the following criteria:

If the Agency, determines to make an award, the Agency will issue an “intent to negotiate” notice to a Proposer based on these evaluations. Should the Agency be unable to reach agreement with the selected Proposer during Contract discussions, the Agency may then undertake Contract discussions with the second preferred Proposer and so on, or the Agency may reject all proposals, cancel this RFP, or solicit new Proposals under a new acquisition process.

## VII. PROPOSAL EVALUATION AND SCORING:

Strategic Planning for the Bureau of VR: The purpose of this proposal is for a professional contractor to contract with the bureau for a comprehensive strategic planning process and plan.

### Evaluation Criteria Possible Points

Completeness of Proposal – proposal includes the following: **25 points**

- Project Plan
- Description of all deliverables within the process
- Budget as requested in the RFP
- Resumes of staff consulting on the project
- Examples of similar strategic plans
- Timelines

Project Design/Plan **25 points**

- Program/project design maximizes resources
- Design addresses all project elements outlined in RFP, including ADA and 503 compliance – comprehensiveness
- Review and analyze the effectiveness of the proposed strategic planning process that includes plan for tracking and reporting project progress
- Review of previous strategic planning materials, staff qualifications and organizations ability to provide the deliverables of the project

Cost Effectiveness/Budget: **25 points**

- Project staff and salaries are appropriate/reasonable
- Project costs are reasonable, and clearly and directly related to the project

Performance Goals and Measures **25 points**

- Relationship between the proposer’s project and RFP goals is clear
- Proposal includes plan for achieving goals according to the timeline

**TOTAL POSSIBLE POINTS 100 points**

The following formula will be used to assign points for costs:

The Agency will select a Proposer based upon the criteria and standards contained in this RFP and from applying the weighting in this section. Oral interviews and reference checks, to the extent they are utilized by the Agency (if applicable), will be used to refine, and finalize scores.

## **B. Planned Evaluations**

The Agency plans to use the following process:

- Initial screening to ensure that the Proposals follow submission requirements.
- Final Evaluation of Technical Proposals and scoring.
- Review of Price Proposals and final scoring; and
- Select the highest scoring Proposer (s) and begin contract negotiation.

## **C. Initial Screening**

The Agency will conduct an initial screening step to verify Proposer compliance with the technical submission requirements set forth in the RFP and the minimum content set forth in Section 5 of this RFP. The Agency may waive or offer a limited opportunity to cure immaterial deviations from the RFP requirements if it is determined to be in the best interest of the State.

## **D. Final Technical Scoring of Proposals**

Following review of written clarifications of proposals requested by the Agency (if necessary), the evaluation team will determine a final score for each Technical Proposal.

## **G. Price Proposal Review**

Price proposals will be reviewed upon completion of the final technical scoring of proposals. Proposers are advised that this is not a low bid award and that the scoring of the price proposal will be combined with the scoring of the technical proposal to determine the overall highest scoring Proposer.

The following formula will be used to assign points for costs:

Proposer's Price Score = (Lowest Proposed Price / Proposer's Proposed Price) x Number of Points for Score

For the purpose of use of this formula, the lowest proposed price is defined as the lowest price proposed by a Proposer who has scored above the minimum necessary for consideration on the Technical Score.

## **H. No Best and Final Offer**

The Proposal should be submitted initially on the most favorable terms which the proposer can offer. There will be no best and final offer procedure. The Proposer should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Proposal.

## **I. Final Selection**

The Agency will conduct a final selection based on the final evaluation of the initial proposals or, if requested, as a result of the Best and Final Offer and begin contract negotiations with the selected Proposer(s).

## **J. Rights of the Agency in Accepting and Evaluating Proposals**

The Agency reserves the right to:

- Make independent investigations in evaluating Proposals.
- Request additional information to clarify elements of a Proposal.
- Waive minor or immaterial deviations from the RFP requirements, if determined to be in the best interest of the State.
- Omit any planned evaluation step if, in the Agency's view, the step is not needed.
- At its sole discretion, reject any and all Proposals at any time; and
- Open contract discussions with the second highest scoring Proposer and so on if the Agency is unable to reach an agreement on Contract terms with the higher scoring Proposer(s)

## **Section 7 – Terms and Conditions Related to The RFP Process**

### **A. RFP Addendum**

The Agency reserves the right to amend this RFP at its discretion, prior to the Proposal submission deadline. In the event of an addendum to this RFP, the Agency, at its sole discretion, may extend the Proposal submission deadline, as it deems appropriate.

### **B. Non-Collusion**

The Proposer's signature on a Proposal submitted in response to this RFP guarantees that the prices, terms and conditions, and Work quoted have been established without collusion with other Proposers and without effort to preclude the Agency from obtaining the best possible competitive Proposal.

### **C. Property of the Agency**

All material received in response to this RFP shall become the property of the State and will not be returned to the proposer. Upon Contract award, the State reserves the right to use any information presented in any Proposal.

### **D. Confidentiality of a Proposal**

Unless necessary for the approval of a contract, the substance of a proposal must remain confidential until the Effective Date of any Contract resulting from this RFP. A Proposer's disclosure or distribution of Proposals other than to the Agency will be grounds for disqualification.

### **E. Public Disclosure**

Pursuant to RSA 21-G:37, all responses to this RFP shall be considered confidential until the

award of a contract. At the time of receipt of proposals, the Agency will post the number of responses received with no further information. No later than five (5) business days prior to submission of a contract to the Department of Administrative Services pursuant to this RFP, the Agency will post the name, rank, or score of each proposer. In the event that the contract does not require Governor & Executive Council approval, the Agency shall disclose the rank or score of the Proposals at least 5 business days before final approval of the contract.

The content of each Proposer's Proposal shall become public information upon the award of any resulting Contract. Any information submitted as part of a response to this request for proposal (RFP) may be subject to public disclosure under RSA 91-A. In addition, in accordance with RSA 9-F:1, any contract entered into as a result of this RFP will be made accessible to the public online via the website Transparent NH (<http://www.nh.gov/transparentnh/>). However, business financial information and proprietary information such as trade secrets, business and financials models and forecasts, and proprietary formulas may be exempt from public disclosure under RSA 91-A:5, IV. If you believe any information being submitted in response to this request for proposal, bid or information should be kept confidential as financial or proprietary information; you must specifically identify that information in a letter to the agency, and must mark/stamp each page of the materials that you claim must be exempt from disclosure as "CONFIDENTIAL". A designation by the Proposer of information it believes exempt does not have the effect of making such information exempt. The Agency will determine the information it believes is properly exempted from disclosure. Marking of the entire Proposal or entire sections of the Proposal (e.g., pricing) as confidential will neither be accepted nor honored.

Notwithstanding any provision of this RFP to the contrary, Proposer pricing will be subject to disclosure upon approval of the contract. The Agency will endeavor to maintain the confidentiality of portions of the Proposal that are clearly and properly marked confidential.

If a request is made to the Agency to view portions of a Proposal that the Proposer has properly and clearly marked confidential, the Agency will notify the Proposer of the request and of the date the Agency plans to release the records. By submitting a Proposal, Proposers agree that unless the Proposer obtains a court order, at its sole expense, enjoining the release of the requested information, the Agency may release the requested information on the date specified in the Agency's notice without any liability to the Proposers.

## **F. Non-Commitment**

Notwithstanding any other provision of this RFP, this RFP does not commit the Agency to award a Contract. The Agency reserves the right, at its sole discretion, to reject any and all Proposals, or any portions thereof, at any time; to cancel this RFP; and to solicit new Proposals under a new acquisition process.

## **G. Proposal Preparation Cost**

By submitting a Proposal, a Proposer agrees that in no event shall the Agency be either responsible for or held liable for any costs incurred by a Proposer in the preparation of or in connection with the Proposal, or for Work performed prior to the Effective Date of a resulting Contract.

## **H. Ethical Requirements**

From the time this RFP is published until a contract is awarded, no bidder shall offer or give, directly or indirectly, any gift, expense reimbursement, or honorarium, as defined by RSA 15-B, to any elected official, public official, public employee, constitutional official, or family member of any such official or employee who will or has selected, evaluated, or awarded an RFP, or similar submission. Any bidder that violates RSA 21-G:38 shall be subject to prosecution for an offense under RSA 640:2. Any bidder who has been convicted of an offense based on conduct in violation of this section, which has not been annulled, or who is subject to a pending criminal charge for such an offense, shall be disqualified from bidding on the RFP, or similar request for submission and every such bidder shall be disqualified from bidding on any RFP or similar request for submission issued by any state agency. A bidder that was disqualified under this section because of a pending criminal charge which is subsequently dismissed, results in an acquittal, or is annulled, may notify the department of administrative services, which shall note that information on the list maintained on the state's internal intranet system, except in the case of annulment, the information, shall be deleted from the list.

## **I. Challenges on Form or Process of the RFP**

Any challenges regarding the validity or legality of the form and procedures of this RFP, including but not limited to the evaluation and scoring of Proposals, shall be brought to the attention of the Agency at least ten (10) business days prior to the Proposal Submission Deadline. By submitting a proposal, the Proposer is deemed to have waived any challenges to the agency's authority to conduct this procurement and the form and procedures of this RFP.

## **Section 8 – Contract Terms and Award**

### **A. Non-Exclusive Contract**

Any resulting Contract from this RFP will be a non-exclusive Contract. The State reserves the right, at its discretion, to retain other Contractors to provide any of the Services or Deliverables identified under this procurement or make an award by item, part or portion of an item, group of items, or total Proposal.

(\*If an Agency believes that an exclusive contract is necessary to attract bidders and get competitive pricing, this section should be deleted.)

### **B. Award**

If the State decides to award a contract as a result of this RFP process, any award is contingent

upon approval of the Contract by Governor and Executive Council of the State of New Hampshire and upon continued appropriation of funding for the contract.

### **C. Standard Contract Terms**

The Agency will require the successful bidder to execute a Firm Fixed Price/Not to Exceed Contract using the Standard Terms and Conditions of the State of New Hampshire which is attached as Appendix A.

The Term of the Contract will be for two (2) years from the date of approval. The contract term may be extended by an additional term of one (1) year at the sole option of the State, subject to the parties' prior written agreement on terms and applicable fees for each extended term. contingent upon satisfactory vendor performance, continued funding and Governor and Executive Council approval.

To the extent that a Proposer believes that exceptions to the standard form contract will be necessary for the Proposer to enter into the Agreement, the Proposer should note those issues during the Proposer Inquiry Period. The Agency will review requested exceptions and accept, reject, or note that it is open to negotiation of the proposed exception at its sole discretion. If the Agency accepts a Proposer's exception the Agency will, at the conclusion of the inquiry period, provide notice to all potential proposers of the exceptions which have been accepted and indicate that exception is available to all potential proposers. Any exceptions to the standard form contract that are not raised during the proposer inquiry period are waived. In no event is a Proposer to submit its own standard contract terms and conditions as a replacement for the State's terms in response to this solicitation.