



Request for Proposal

Developing a Strategic Plan for the Washington Metropolitan Chapter of the Community Associations Institute (WMCCAI)

7600 Leesburg Pike, Suite 100 West
Falls Church, Virginia 22043

Description of Organization

Community Associations Institute is a worldwide not-for-profit organization dedicated to building better communities. Since 1973, CAI has been the leader in providing information, education and resources to community associations and the professionals who support them. CAI advocates for legislative and regulatory policies that support responsible governance and effective management. Members include community association residents, managers, management firms and other professionals and companies that provide products and services to community associations. CAI's mission is to inspire professionalism, effective leadership and responsible citizenship, ideals reflected in communities that are preferred places to call home. CAI works in partnership with 60 domestic chapters, a chapter in South Africa and housing leaders in a number of other countries, including Australia, Canada, the United Arab Emirates and the United Kingdom.

Washington Metropolitan Chapter Community Association Institute is the largest CAI chapter and serves community association stakeholders in northern Virginia, suburban Maryland and the District of Columbia. As of October 2013, WMCCAI's 2,850 members span more than 80 cities and counties and include nearly 1,500 homeowners, 100 community association management firms, more than 950 community association managers and more than 300 other professionals and companies that serve the community association industry.

WMCCAI acts as a clearinghouse for information and best practices in community association development and management, and many consider the organization their first source for cutting-edge information and professional development opportunities. WMCCAI advances excellence through seminars, workshops, conferences and educational programs, some of which lead to professional designations and/or continuing education credits. People who work and live in area community associations pay attention to what's happening in the industry through Quorum™ magazine, bi-weekly e-Newsletters and WMCCAI's website and social media presence. Community association industry stakeholders rely on WMCCAI to advocate community association interests before legislatures, regulatory bodies and the courts, and they use our Online Service Directory to identify companies and professionals that can meet their communities' needs.

Proposals

Proposals must contain the following information in order to be considered:

1. A cover letter must provide the name and title of the person(s) who are authorized to answer questions about this RFP. Include telephone, fax number and email address.

2. Describe how you will involve the leadership, staff and stakeholders in this planning process.
3. Describe the format of your final strategic plan.
4. Describe work plan and time frames for completing this project.
5. Are there any additional ways that you would suggest to meet the RFP requirements?
6. Estimate of costs including an hourly rate and estimate of hours required for each phase of project.

Qualifications

The firm or individual responding to this RFP must provide information on its qualification to provide this service.

1. Evidence of substantial knowledge and experience in developing strategic plans for not-for-profit organizations.
2. Evidence of substantial knowledge and experience in working with not-for-profit organizations in the Washington Metropolitan area.
3. Knowledge or experience in working with diverse community groups.
4. Knowledge or experience in working with the community association industry.

The proposal should include a brief history of the firm, its size and its experience with the nonprofit community. Also describe the staff(s) to be assigned to this project including their relevant experience.

References

Provide the name and contract information for three clients whose requirements are comparable in scope and complexity to Washington Metropolitan Chapter Community Associations Institute. Provide a copy of a strategic plan developed for one of these clients.

Proposal Response Date

Your response must be received no later than March 1, 2014 and must be mailed or delivered to Matt Rankin, Executive Director, Washington Metropolitan Chapter Community Associations Institute, 7600 Leesburg Pike, Suite 100 West, Falls Church, VA 22043.

Bidders' Conference

A discretionary meeting for potential vendors will be held on February 3, 2014 where they will be able to meet key WMCCAI personnel and ask proposal-related questions. RSVP to this meeting to mrarkin@caidc.org by January 27, 2014.

Incurring Costs

Proposals should be prepared simply and economically to provide a concise description of the firm's capabilities to perform the services required. Washington Metropolitan Chapter Community Associations Institute will not be responsible for any costs incurred in the preparation of proposals in response to this RFP.

Signature

An official authorized to bind the firm to its provisions must sign all proposals.

Effective Period

All proposals submitted to this RFP must be valid for at least 90 days.

Number of Copies

Firms must submit one clearly marked original and five copies of the proposal.

Withdrawal

The proposal may be withdrawn in person or by written request.

Late Proposals

Proposals received after the specified date and time will not be accepted.

Evaluation Criteria

A committee of Washington Metropolitan Chapter Community Associations Institute board and staff will evaluate the proposals submitted. Evaluation criteria include, but are not limited to, the understanding of the proposal requirements as evidenced by the quality of the proposal response, relevant experience, qualifications of staff to be assigned, timelines, and total proposed cost.

WMCCAI reserves the right to request additional information or clarification from vendors, to allow correction of errors or omissions, and to waive irregularities and/or formalities when so doing may serve the best long-term interests of the organization. Some firms may be selected to make an oral presentation to the evaluation committee. The decision will be made by the evaluation committee at its sole discretion.

WMCCAI reserves the right to reject any or all proposals and to proceed in any other manner selected by WMCCAI.

WMCCAI reserves the right to award to the firm that it believes, in its sole discretion, best meets the needs of the organization.

Statement of Requirements

1. Purpose

WMCCAI requires the services of a qualified strategic planning consultant to create a WMCCAI Strategic Plan in collaboration with the Chapter's Strategic Planning Committee. Executing against a strategy with clearly defined objectives will ensure Chapter leadership, management and staff decisions are driving the organization towards the desired end state. The most successful strategies are straightforward, easily implemented and can be updated to reflect evolving priorities and needs.

Unlike other approaches to strategic planning, WMCCAI desires an approach that extends beyond simply writing a formal strategy document. The contractor should propose an approach that not only facilitates the development of the strategy but also articulates how best to operationalize the strategy. The proposed strategy development and management processes must lead WMCCAI to develop the strategy, implement, communicate and measure strategic implementation, leaving room for any needed course corrections. It is anticipated that at one point or another, all elements of WMCCAI (Strategic Planning Committee, Board of Directors, Executive Manager, and staff) will be engaged in this process, increasing ownership and buy-in.

2. Background

The WMCCAI Board of Directors recognizes the need for a metrics-based strategy to avert common pitfalls found in most organizations that do not have a forward-thinking strategic plan. Common pitfalls the Board of Directors desires to avoid are:

- **Reactive rather than proactive decision processes.** It is increasingly important that each organizational function directly or indirectly support mission accomplishment. Without a well-developed strategy to define the organization's mission, vision and objectives, it is impossible to think proactively. Successful organizations place this strategy at the center of the management process, using it to drive decisions at all levels.
- **Lack of Communication.** Failure to appropriately target messages to key stakeholders and proactively manage communications within an organization can result in missed opportunities and weak organizational brand. An effective strategic communication plan appropriately engages internal and external audiences with a focused plan of action aligned with the overall organizational strategic and business

priorities. This results in consistent messaging, greater work force participation and information sharing.

- **Conflicting Priorities.** Lack of agreement on priorities can lead to internal competition for resources, weakening the organization. A clearly defined strategy puts the leadership and the work force on the same page, making decisions based on a consistent set of strategic priorities. Where resources are limited, agreement on higher level priority initiatives can minimize competing interests, resulting in allocation of funding to efforts that will support the organization's survival and future success.
- **Lack of Performance Measurement.** Without a performance measurement system, there is no means for measuring success. Metrics enable leaders to *drive* and *evaluate* behavior by establishing targets and assigning individuals accountable for those results. These same metrics enable organizations to report and demonstrate positive performance to leadership, superiors, and external agencies.

3. Tasks

Task 1: Developing a Strategy Map

The contractor's approach to strategic planning shall follow some form of framework called a "strategy map" (a graphic display of the organization's mission and strategic objectives). The contractor has full latitude in their proposal to identify other strategies that, ultimately, will get WMCCAI to the same place. The "strategy map" shall consider multiple aspects of the organization, balancing the complete set of "perspectives" needed to accomplish the mission (See Figure 1). The contractor will guide a core team of individuals from across the WMCCAI organization through the process for developing a complete Strategy Map. The contractor's process shall closely examine the desired end state, verify that the final strategy will move the organization towards that vision, and build on any existing strategic planning efforts (as appropriate). The contractor shall leverage industry best practices and expertise in the methodology to tailor the process to meet the specific needs of the WMCCAI organization, accounting for environmental factors. This deliverable will form the basis for implementation and provide the detail needed to operationalize the strategy.

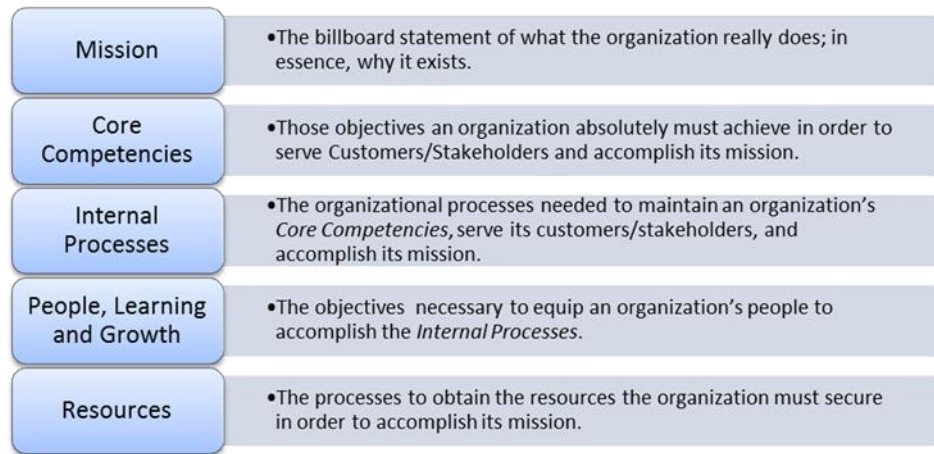


Figure 1 – Strategic Plan Perspectives

Deliverable(s): The contractor shall deliver a completed strategy map.

Task 2: Performance Measurement System:

Measurement drives both organizational and individual behavior. The contractor shall lead the development of measures and targets for each component of the strategy map as the basis for the performance measurement system. Well-developed metrics will allow the WMCCAI Board of Directors and management to frame expectations internally (with personnel) and externally (with customers), identify key success factors, identify gaps between performance and the expectation, and demonstrate return on investment by identifying efforts that yield positive results.

Deliverable(s): The contractor shall deliver a documented set of performance measures and metrics based on discussions with WMCCAI stakeholders.

Task 3: Communications Strategy:

The contractor shall develop a strategic communications plan that outlines steps to appropriately engage internal and external stakeholders, in support of the strategy map. Part of this plan will include efforts to build a strong culture of communication and collaboration within the WMCCAI organization, as this will support more effective external communication in future years. The contractor shall ensure efforts stay focused on the right messages and goals, measuring the reach of their content to gauge the effectiveness of these efforts. WMCCAI will develop and use the appropriate vehicles to deliver messages and establish effective objectives that align with the organization's overall strategic goals.

Deliverable(s): Marketing strategy aligned with the newly defined business and organizational goals.

WMCCAI Furnished Materials and Information:

Basic facilities such as work space and its associated operating requirements (i.e., access to phones, work space, limited consumable and general purpose office supplies) may be provided while working in the WMCCAI facility.

Documents, data files, reports, correspondence, and all other documents and writings, together with any charts, graphs, tables, illustrations, photographs, images, and other illustrative, explanatory, historical documents related thereto or independent thereof, regardless of the medium (or media) by which they were produced, preserved, stored, or created in connection with or for purpose(s) of work performed under this SOR and contract, are property of the WMCCAI and shall be delivered to the WMCCAI Executive Director prior to the end of the contract. The Contractor agrees to assume responsibility for protecting the confidentiality of any WMCCAI records that may be used during the performance of this contract.

Nondiscrimination

Washington Metropolitan Chapter Community Associations Institute's contractors shall not discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight or marital status, or disability that is unrelated to the individual's ability to perform the duties of a particular job or position. The vendor shall observe and comply with all applicable federal, state and local laws, ordinances, rules and regulations which shall be deemed to include, but not be limited to, the Elliott-Larsen Civil Rights Act and the Persons with Disabilities Civil Rights Act.

Questions

All questions relating to this RFP should be directed to Matt Rankin, WMCCAI executive director, at 703-750-3644 or mrankin@caidc.org.