



## REQUEST FOR PROPOSALS (RFP)

WestEd Procurement Department

<b>Title:</b>	Long-Term Strategy Development Project
<b>Issue Date:</b>	January 8 <sup>th</sup> , 2024
<b>Due Date:</b>	January 31 <sup>st</sup> , 2024, by 3:00 p.m. (PT)
<b>RFP Contact:</b>	Rashmi Narsana, Executive Operations Director
<b>Email:</b>	Strategic_Planning_2024@wested.org
<b>Proposal Delivery:</b>	Strategic_Planning_2024@wested.org

**Note:** Proposal responses will be considered valid for a period of 120 calendar days after the proposal due date.

Updates, changes, or addendums to this RFP are posted at <https://www.wested.org/about-us/work-with-wested/>



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## 1. INTRODUCTION & PURPOSE

WestEd seeks proposals from organizations with extensive experience and proven track records leading strategy development and planning for nonprofit and/or public sector organizations similar in scope and complexity to WestEd based on size, structure, business model, and specialization. We seek an organization to work with our Executive Leadership Team to push our thinking as we work to capture a strategy that addresses clear needs in the fields of education and human development, advances our mission, and orients and informs decision-making by WestEd leaders for the upcoming 5 years. We aim to engage with a partner by March 1<sup>st</sup>, 2024, and conclude this engagement by the end of October 2024, with a critical milestone of having a final strategy framework and roadmap ready to share with our Board by October 1, 2024.

This request for proposal (RFP) provides background information, expectations for the engagement, and proposal submission guidelines. The selection of a partner will be based on an evaluation of proposals adhering to the requirements set forth in this RFP.

WestEd seeks a collaborative partner that can facilitate a process to perform the following activities through this project:

- Conduct a strategy development process that actively engages WestEd staff in meaningful and creative ways, fostering a shared vision with relevant understanding of strengths, opportunities, and challenges to guide our future decision-making. This process will inform both internal and external communication about WestEd’s strategy.
- Refresh our strategic approach to provide the following:
  - a clear strategic “North Star” that clarifies the core of our strategy and how we intend to achieve our goals, inspires and motivates WestEd employees at all levels of the organization, and reflects our leadership in the fields of education and human development
  - strategic goals and key priorities that provide direction for WestEd’s initiatives, investments, and efforts over the next 5 years
  - a strategic framework and roadmap that serves as a “big picture” orienting the expression of our strategy and key actions with a commitment to continuous improvement
- Initiate implementation planning with our Executive Leadership Team.

## 2. WESTED BACKGROUND

WestEd is a not-for-profit research, development, and service agency with a more than 55-year history working with education and other communities to promote excellence; achieve equity; and improve learning for children, youth, and adults. WestEd has more than 1,300 employees,

13 offices across the United States, and staff living in approximately 40 states. WestEd's revenue in 2023 was approximately \$245 million through projects funded by grants and contracts with federal, state, and local agencies and philanthropic organizations. WestEd has grown by over 40 percent in revenue and personnel in the past 2 years.

In October 2023 Jannelle Kubinec was named WestEd's CEO; her predecessor was in the role for 26 years. Jannelle comes to her role with 12 years of program and executive leadership at WestEd. The change of leadership and significant growth in recent years makes this the right time to refresh the agency's strategic approach to achieving our vision and mission.

The CEO and her Executive Leadership Team (ELT), which includes WestEd's three Program Division Directors, Chief Development Officer, Chief Talent Officer, and Chief Financial Officer, lead, mobilize, and operationalize a long-range course of action and a set of goals to align with and achieve the organization's vision in collaboration with WestEd senior leadership. Engagement of the ELT throughout this project will be critical to its success.

In 2018 WestEd reorganized its program leadership from 10 Program Areas, each led by a Program Director, to three Divisions, each led by a Division Director. Each Division is organized around a specific focus: K–12 systems; early childhood learning and human development; and research, evaluation, and assessment with approximately six to eight Content Area teams within each Division. More information about WestEd's depth of expertise and services can be found at [www.wested.org](http://www.wested.org).

A robust administration and infrastructure system supports the full range of operational business areas, including Communications, Institutional Development, Finance, Grants and Contracts, Legal, Information Technology, Human Resources, Facilities, and Accounting.

Our preparation to refresh our long-term strategy has included the following, which will be shared with the selected partner once a contract is in place:

- ***Board and Leadership Discussion of Enduring Challenges***—In October our Board and senior leaders engaged in discussion about enduring challenges in policy, practice, and research that provide a sense of long-term vision for WestEd.
- ***Independent Market Analysis***—We have a long-standing partnership with an external group that has conducted several market scans for WestEd, including a recent analysis of potential opportunities, strengths, and gaps.
- ***Enterprise Risk Assessment***—We recently completed a comprehensive, independent Risk Assessment for WestEd that drew from perspectives of senior leaders and business benchmarks to address areas of need and opportunities for improvement.

- **Strategy and Goal Planning Documents**—We have identified two priority areas—Equity and Whole Child—as areas of focus and investment to advance our mission through internal and external work. In addition, we annually adopt goals and metrics, which we use to guide work planning and evaluate organizational performance.

WestEd is a Joint Powers Agency (“JPA”) formed under the California Joint Exercise of Powers Act, California Government Code section 6500 et seq. and governed by public entities in Arizona, California, Nevada, and Utah. WestEd’s Board of Directors is comprised of members representing agencies from these states, as well as other national education and business leaders. WestEd’s income is tax exempt under Section 115 (1) of the Internal Revenue Code.

WestEd complies with the required federal regulations on procurement, as well as applicable State procurement law and procedures.

Efforts, including affirmative steps prescribed by federal regulation (if applicable), will be made by WestEd to utilize small and minority-owned businesses, women’s business enterprises and labor surplus area firms when possible. The selected firm may be required to undertake affirmative steps to utilize such firms in subcontracts if this contract is federally funded. A firm qualifies as a small business firm if it meets the definition of “small business” as established by the Small Business Administration (13 CFR 121.201, Subsector 541618) by having average annual receipts for the last three fiscal years not exceeding \$19 million.

### **3. AWARD OF CONTRACT**

WestEd reserves the right to reject any and all proposals. The award, if any, will be to the bidder whose proposal best complies with all the requirements of the RFP document(s) and any addenda. Email notification will be sent to all bidders via a "Notice of Intent to Award". The notice is valid for five (5) consecutive working days prior to the award. Evaluation methodology and bases for award are described in the Evaluation and Selection section of this document.

### **4. TERM**

The term of any resulting agreement is for **8 months** (March – October 2024), with WestEd’s option to extend the term, based upon performance, qualification, scope of services, and is subject to the same terms and condition of the initial agreement.

### **5. NON-DISCLOSURE AGREEMENT**

To ensure the confidentiality of sensitive information, the selected party will be required to sign a Non-Disclosure Agreement (NDA) upon any resulting award. The NDA will serve to establish a legally binding commitment between the involved parties to prohibit the disclosure or use of any proprietary or confidential information obtained during the engagement.

## 6. SCHEDULE OF EVENTS

RFP Activity	Date (2024)
RFP Released	01/08
Questions Due via email*	01/16
Response to questions posted	01/19
Proposal Submission Deadline	01/31 by 3pm PT
Interviews & Presentations	February TBD (via Zoom)
Notice of Intent to Award	February TBD
Protest Period	5 days upon Notice of Intent to Award
Commencement of Services	03/01

\*Questions must be emailed to **Strategic\_Planning\_2024@wested.org**. Questions will be accepted and responded to via email ONLY.

The dates up to and including the “Proposal Submission Deadline” date may be adjusted upon advance written notice. Dates after the receipt of proposals may be adjusted without written notice.

***PROPOSALS NOT RECEIVED BY THE DATE AND TIME SPECIFIED WILL BE REJECTED.***

**7. SOLICITATION FORM**

If awarded, the undersigned offers and agrees to furnish the services listed in this RFP at the prices and terms stated, subject to mutually agreed upon terms and conditions. Additionally, the undersigned warrants and represents their authority to bind the firm into an agreement subject to the terms and conditions of this Request for Proposal.

Company Name:

Street Address:

City, State Zip:

Email:

Telephone:

By (Authorized Signature)	Date Signed:
Print name and title of Authorized Signatory	

ALL SPECIFICATIONS, TERMS, AND CONDITIONS OF THIS REQUEST FOR PROPOSAL WILL BE INCORPORATED INTO ANY RESULTING AGREEMENT.

***FAILURE TO SIGN THIS PAGE WILL DISQUALIFY YOUR RESPONSE***

## 8. SCOPE OF WORK

For more than 55 years, WestEd has worked at the nexus of research, practice, and policy, taking on the most demanding and enduring challenges in education and human development. We work in partnership with system leaders across the country and across sectors (such as education, health, mental and behavioral health, justice, etc.) to achieve a vision of a more equitable society for all young people, families, and communities. We have grown steadily over time with a significant period of growth from 2021 through 2023. With growth has come new assets, domains of work, and opportunities. Our growth to date reflects a mix of organic evolution, individually driven entrepreneurship, and planned investments. With our recent growth and change in leadership, we believe it is time to revisit and refresh our overall strategy to ensure continued effectiveness in addressing our mission.

Through this process we desire a strategy framework and roadmap to guide our near and intermediate actions with a long-term vision and goals. We seek a consulting team to create an engaging, participatory planning process that takes stock of our assets, identifies the core issues to address through our strategy, challenges our thinking, and unlocks creativity to imagine possibilities to further our ability to drive impact in service of our mission. We are not interested in a templated strategic plan (i.e., mission, vision, values, actions). The **framework and roadmap** should address the following based on reflections of our current approach, plans, and insights from staff:

- WestEd’s “North Star,” value proposition, and strategic goals and priorities.
- Provide a resource and reference point to guide strategic allocation decisions and other decisions related to our impact, innovation, and growth.
- Build a shared internal understanding of areas of focus and milestones for success through a clear and compelling roadmap.

In addition, the project should also include a plan for rolling out the framework and roadmap to our Board and staff with collateral materials created in collaboration with WestEd’s Communications Department.

### Key Activities and Deliverables

The following key activities and deliverables are expected within the specified deadlines:

Kickoff meeting	On or around March 1, 2024
Updated workplan, including staff engagement plan details	Within 2 weeks of kickoff
Draft framework	By July 1, 2024
Draft roadmap	By September 16, 2024
Final framework, roadmap, and communication materials	By October 1, 2024



Presentation of final framework and roadmap, Initiation of implementation planning with WestEd Executive Leadership Team	Week of October 7, 2024
Presentation to WestEd Board	October 17, 2024
End of Project—finalization of all deliverables and closeout of project	October 31, 2024

## 9. BUDGET

WestEd expects to enter into a contract with a firm or organization for up to \$500,000, inclusive of all expenses (labor, travel, etc.). We will consider proposals above this amount provided that there is a clear description of the budget to meet the scope of work within this threshold and additional work shown as “optional,” with pricing details. WestEd will not reimburse for the costs incurred in the preparation of a response to this RFP.

## 10. EVALUATION AND SELECTION

All proposals must align with the RFP submission requirements, meeting minimum content, quality standards, and complying with WestEd’s General Provisions (Section 21). Noncompliant proposals will be excluded from consideration. Those meeting the criteria will undergo review by the WestEd Evaluation Team, with the possibility of interviews or meetings for clarification or modifications. WestEd reserves the right to make an award without further discussions, cancel the RFP, or not select any firm, seeking proposals on the most favorable terms.

As a federal contractor, WestEd prioritizes small businesses, disadvantaged small businesses, veteran-owned small businesses, minority-owned firms, and woman-owned businesses (SBA-WO-V). Preference will be given to firms meeting these criteria, provided they meet all other RFP stipulations.

WestEd is open to a variety of approaches and invites creative methods to address the above scope of work and deliverables. Among our values are commitments to collaboration and transparency. As such, it is critical that the firm/organization that works with us design a process of engagement and communication that reflects both values in the approach to this work.

Proposals should be organized in the following sections and be limited to 15 pages, with the addition of an optional Appendix. Following is a description of each section and the evaluation considerations. WestEd will select the proposal that is most responsive to our needs at the best value.

Criteria	Points
1. <b>Letter of Transmittal</b> —Provide an overview of the firm, capacity to conduct this work, and value proposition for WestEd, along with the signed Solicitation Form (section 7)	N/A
2. <b>Experience and Capabilities</b> — Qualifications and ability to carry out the described work	20 points
3. <b>Approach and Workplan</b> —Include project design and approach, timeline, and description of deliverables	35 points
4. <b>Staffing</b> —Include brief bios for key staff and a project team organizational chart	20 points
5. <b>Budget</b> —Include total cost with breakdown by task and personnel with hours and hourly rates	20 points
6. <b>Other factors</b> — including completeness of proposal, adherence to RFP instructions, other relevant factors not considered elsewhere, SBA-WO-V, etc.	5 points
7. <b>Appendix</b> —Include 2 client references, project team resumes, sample of work, or other background materials useful in evaluating the proposal (i.e., case studies, testimonials, etc.)	N/A

## 11. REJECTION OF PROPOSAL(S)

WestEd reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. The proposal may be rejected if it fails to meet a material requirement of the RFP or if it is incomplete or contains irregularities. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements.

Immaterial deviations may cause a bid to be rejected. WestEd may or may not waive an immaterial deviation or defect in a proposal. WestEd’s waiver of an immaterial deviation or defect will in no way modify the RFP or excuse a firm from full compliance with the RFP requirements.

Any proposal may be rejected where it is determined to be not competitive, or where the cost is not reasonable. Proposals that contain false or misleading statements may be rejected if in WestEd’s opinion the information was intended to mislead WestEd regarding a requirement of the RFP.

WestEd may reject a proposal from a firm it finds non-responsible. Any person or entity that has substantially assisted WestEd in preparing any part of this RFP is prohibited from submitting a proposal. Submission of a proposal to WestEd shall constitute the firm’s certification that the proposal is not collusive.

## **12. QUESTIONS & POINT OF CONTACT**

Questions and comments regarding this RFP must be submitted in writing via email to **Strategic\_Planning\_2024@wested.org** and received no later than the date indicated in Section 6, Schedule of Events. All questions will be responded to via email. Firm(s) invited to submit proposals understand and agree that they have an affirmative duty to inquire and seek clarification regarding anything in this RFP that is unclear or open to more than one interpretation.

WestEd, at its sole discretion, may make questions submitted by firms and responses to the submitted questions available to all firms.

All communications, including any requests for clarification, concerning this RFP should be addressed in writing to:

Rashmi Narsana, Executive Operations Director  
**Strategic\_Planning\_2024@wested.org**

## **13. ERRORS AND OMISSIONS**

If prior to the proposal deadline a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP or any of its exhibits and/or appendices, bidder shall immediately notify WestEd of such error in writing and request modification or clarification of the document. Modifications may be made by addenda prior to the RFP response deadline.

## **14. ADDENDA**

WestEd reserves the right in its sole discretion to revise or amend this RFP prior to the stated submittal deadline. Any such revisions will be made by written addenda to this RFP. Firms are responsible for verifying they have received, and all proposals shall acknowledge receipt of, all addenda issued by WestEd relating to this RFP. Failure to acknowledge receipt of all such addenda may render a proposal nonresponsive.

## **15. CANCELLATION OF SOLICITATION**

This solicitation does not oblige WestEd to enter into an agreement. WestEd retains the right to cancel this RFP at any time for any reason. WestEd also retains the right to obtain the services specified in this RFP in any other way. No obligation, either expressed or implied, exists on the part of WestEd to make an award or to pay any cost incurred in the preparation or submission of response to the RFP.

## **16.DELIVERY OF PROPOSAL**

Electronic copies of proposals must be received no later than the time and date indicated in Section 6, Schedule of Events. Any response received after this date may be returned or not considered. Responses should be submitted electronically to:

Rashmi Narsana, Executive Operations Director  
**Strategic\_Planning\_2024@wested.org**

Submission of a proposal shall constitute the firm's representation that it has thoroughly examined and become familiar with the scope of work set forth in this RFP; understands the requirements of the scope of work, the nature of the work and all other matters that may affect the work; will honor its proposal for no less than 120 days after the submission date stated in this RFP (or until execution of a final contract with the selected firm, if sooner), and acknowledges that its proposal cannot be withdrawn within that time without the written consent of WestEd; will comply with all requirements set forth in this RFP, and in the ensuing contract, if any.

## **17.PROTESTS**

Following the selection of the apparent successful firm, WestEd shall notify all firms of its intent to award a contract to such firm. Any protest to the award shall be submitted to WestEd in writing within no less than five (5) working days from the date of such notice. Any protest shall state with specificity the ground on which the protestor alleges the contract may not be awarded to the apparent successful firm. WestEd shall consider any properly submitted protest and may accept or reject such protest as it determines appropriate in its sole discretion.

## **18.NOTICE TO FIRM(S)**

All materials provided to WestEd become the property of WestEd and may be returned only at its sole discretion. All proposals and any materials submitted with a proposal may be deemed public records subject to disclosure pursuant to the California Public Records Act. No portion of any proposal or materials submitted therewith will be withheld from disclosure as proprietary, trade secret or confidential unless that portion is clearly marked by the firm as such, and the firm agrees to indemnify WestEd against any claim or action to compel disclosure of such portion of the proposal.

WestEd is not obligated to accept any proposal or to negotiate with any entity. All transactions are subject to the final approval of WestEd, which reserves the right to reject any and all proposals without liability. All costs directly or indirectly related to a response to this RFP will be borne by the firm.

## **19.USE OF SEPARATE CONSULTANTS/CONTRACTORS & SUBCONSULTANTS FOR PORTIONS OF SERVICES**

WestEd reserves the right to award all or only a portion of the work/scope of services that is the subject of this RFP to the successful bidder. This includes the right to award one or more portions of the services to a separate contractor if WestEd deems such award to be most advantageous to WestEd in its sole discretion. WestEd further reserves the right to review, approve, and/or reject any proposed subconsultants and/or subcontractors proposed by any bidder if deemed to be in the best interest of WestEd. Bidders acknowledge that if WestEd elects to award any such separate or independent contract the successful bidder shall coordinate its work with such separate contractors as directed by WestEd.

## **20.COMPLIANCE WITH LAWS**

Any firm must affirmatively agree and certify that it will comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Any firm must affirmatively agree to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

## **21.GENERAL PROVISIONS**

- A. Amendments to RFP. WestEd reserves the right to amend the RFP or issue to all bidders a Notice of Amendment to answer questions for clarification.
- B. No Commitment to Award. Issuance of this RFP and receipt of proposals does not commit WestEd to award a contract. WestEd expressly reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one bidder concurrently, or to cancel all or part of this RFP.
- C. Amendments to Proposals. No amendment, addendum or modification will be accepted after the deadline stated herein for receiving proposals. Bidder may modify or amend its proposal only if WestEd receives the amendment prior to the deadline stated herein for receiving proposals.
- D. Non-Responsive Proposals. A proposal may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the proposal.
- E. Late Proposals. WestEd will not be responsible for proposals that are delinquent, lost, incorrectly marked, sent to an address other than that given herein, or sent by mail or courier service and not signed for or acknowledged by WestEd.

- F. Withdrawal of Proposals. A proposal may be withdrawn after it is received by written request signed by the bidder or authorized representative, prior to the proposal submission deadline. A proposal may be withdrawn and resubmitted in the same manner if done so prior to the appropriate deadline. Withdrawal or modification offered in any other manner will not be considered.
- G. Costs for Preparing. WestEd will not compensate any bidder for the cost of preparing any proposal, and all materials submitted with a proposal shall become the property of WestEd. WestEd will retain all proposals submitted and may use any idea in a proposal regardless of whether that proposal is selected.
- H. Alternative Proposals. Only one final proposal is to be submitted by each firm. Multiple proposals will result in rejection of all proposals submitted by the bidder.
- I. Public Documents. All proposals and all evaluation and/or scoring sheets shall be available for public inspection at the conclusion of the selection process.
- J. Non-Endorsement. If awarded, the bidder shall not issue any news releases or other statements pertaining to selection, which state or imply WestEd endorsement of bidder's services.
- K. Conflict of Interest. Bidders are advised that the bidder's officers and employees shall comply with the disclosure, disqualification, and other provisions of California's Political Reform Act of 1974 (Government Code Section 81000 et seq.) if their responsibilities include the making or participation in the making of a WestEd decision.