

REQUEST FOR PROPOSALS

for

STRATEGIC PLANNING

FACILITATION

Kenmore – Town of Tonawanda
Union Free School District
Board of Education

Request for Proposals Issued: 10/11/2016

Deadline for Submittal of Proposals: 11/8/2016

Request for Proposals for Strategic Planning Facilitation

I. OVERVIEW

Introduction

The Kenmore-Town of Tonawanda Union Free School District (KTUFSD) is seeking proposals from qualified consulting firms to facilitate the development and execution of its strategic plan for a comprehensive facelift to create a strong, appealing District identity. This re-examination of our identity should provide a solid long-term foundation for expressing who we are, what we stand for, and why—in other words, a clear, positive, bold expression explaining and promoting what makes us unique.

Background

The KTUFSD is located in the Western New York region. The District serves an ethnically diverse population of approximately 7,000 students. The District has five K-4 schools, two 5-7 schools and two 8-12 schools. Our enrollment ranks 17th largest of 509 districts in upstate New York, and third largest in the eight counties of Western New York.

The District extends over a geographical area of 17 square miles, including the Village of Kenmore and the Town of Tonawanda, whose combined population is 73,567 residents. The school budget for 2015-16 was \$155,195,885.

Purpose for a Strategic Messaging Plan

KTUFSD has long held a high reputation among state public school systems. The International Baccalaureate (IB) Program, Career Academies, and a new multi-year 1:1 iPad initiative are just some recent examples of vibrant change and innovation that may have been overshadowed by headlines about the Huntley Plant financial crisis and school consolidation challenges. Furthermore, the District's internal and external position statements have remained unchanged for a decade or so.

We feel it is time for the shadow to be lifted and for efforts by staff to showcase, celebrate and publicize the current and future strengths of KTUFSD's schools to be emboldened and fortified with a centralized vision.

Therefore, we are seeking an overhaul of our District branding, an inclusive, multi-stage process to involve consultants, and a full range of stakeholders—teachers, students, parents, alumni, retired District employees, school administrators and staff, community leaders and residents. With the help of these voices, KTUFSD wants to create a fresh set of vision and mission statements, along with goals and values, capturing and promoting our story as we continue to proceed confidently into the 21st century.

Ideally, the new strategic messaging plan will be completed by June of 2018. It is our hope that the comprehensive strategic plan will reinforce a sense of pride and camaraderie among students, teachers and staff. These effects will reinvigorate the District's positive climate and culture. The plan should also highlight the District's key role in the Kenmore-Town of Tonawanda community.

A freshly articulated messaging campaign will not only create a common focus to drive District decisions and operations. It will also ideally have a positive effect on student enrollment, attracting young families to Kenmore-Tonawanda. It would likely have a beneficial impact on teacher recruitment as well.

In addition to attention-grabbing rewritten expressions of vision, mission, goals and values, we would expect the messaging package to include a lively tagline or motto, and perhaps an original District logo.

We seek, then, a comprehensive campaign that raises the internal and external profile of our public school district. The campaign should focus on boosting messaging, continuing to grow digital media efforts, strengthening ties with linking partners, families, community groups, and school personnel. As we approach the year 2021, the 95th year of the establishment of the KTUFSD, that milestone might serve as a catalyst to put these profile enhancing efforts into play, resulting in a drive whose eye is on a “Vision of the Future.”

Through special events and increased publicity and outreach efforts over the next two years, the KTUFSD should be able to gain support and establish long-lasting relationships to ensure its place in the community and reinforce its high reputation in Western New York quality public education. Research should be done on what KTUFSD does *already* and on what KTUFSD *can* do.

A new strategic messaging plan should brainstorm ways: to partner with existing businesses (much in the way that Holmes Elementary currently links with Praxair, Inc.); to analyze our District; and to investigate public perception via a multi-faceted series of focus groups involving teachers, administrators, students, staff, parents, counselors, social workers, and community representatives. The strategic plan should fully describe the Internal Environment and External Environment that establish goals to showcase how KTUFSD excels in comparison to public and private schools within and bordering its District boundaries.

The Internal and External Environment pieces should emphasize how our schools aim to improve the performance of student learners at all levels. **Under Internal Environment** the plan should analyze how the KTUFSD school culture is continually nurtured by igniting passion with ideas like expanding communication channels to get everyone on the same page. This ongoing initiative recognizes staff and students for a job well done, promoting a climate of “doing,” focused on bringing the best work and collaboration to counter potential negativity. It seeks to improve employee and participant morale with team-building exercises, retreats, etc. **Under External Environment**, the plan would explore and analyze how the KTUFSD competes with and is superior to neighboring public and private school systems. The emphasis here is on what makes the KTUFSD, the village of Kenmore, and the Town of Tonawanda, a collectively desirable destination to raise and educate children.

In addition, the strategic messaging plan should take into account the four categories of “Publics:” students; educators; enablers; and limiters. This analysis is along the lines of the structured planning method known as SWOT (strengths, weaknesses, opportunities, and threats). Here, students are the people who benefit from the quality of educational opportunities. Enablers are the people who make it possible for the KTUFSD to provide quality education: teachers, staff, administrators, volunteers, parent advisory boards, community members, social service organizations, government agencies, and the media. Limiters are people who oppose or compete with the KTUFSD.

These Publics should be interviewed, surveyed, included in focus groups, subjects of case studies, and contacted through social media to draw a rich portrait of the positive, unique features of the KTUFSD. Through such research, the strategic plan will be able to embrace our rich history while we stride boldly toward the future. The plan will highlight a District proud of our roots and foundation--a place where Helen Keller, President Herbert Hoover, and Jackie Robinson spoke; a place whose graduates include astronauts, award-winning journalists, musicians, scientists, professional athletes, and, yes, teachers. The plan will also show a District on a mission, enthusiastic and fully-equipped, to take our next big steps deeper into the twenty-first century.

II. GENERAL INSTRUCTIONS

Interested firms are invited to submit one original signed proposal and five (5) separate digital copies (flash drives) in write protected PDF format.

The proposal shall be submitted in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than **November 8, 2016** to the following address:

Gina Santa Maria, District Clerk
RFP for Strategic Planning
Kenmore – Town of Tonawanda
Union Free School District
1500 Colvin Blvd
Buffalo, NY 14223
gsantamaria@ktufsd.org

The sealed envelope shall be marked on the outside lower left corner with the words “RFP for Strategic Planning Facilitation”. It is the firm’s sole responsibility to ensure that their response is received prior to the scheduled closing time for receipt of statements of qualifications. No corrected or resubmitted statements will be accepted after the deadline. Faxed responses are not appropriate for submission and will not be accepted or considered.

This Request for Proposals does not commit the KTUFSD to award a contract or pay any costs incurred in the preparation of a response to this request. KTUFSD reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Proposals. KTUFSD further reserves the right to accept the response that it considers to be in their best interest.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All responses, whether selected or rejected, shall become the property of KTUFSD. Firms are responsible for checking the website periodically at ktufsd.org for any updates or revisions to the RFP.

Requests for Information

Firms interested in making a submittal are directed not to make personal contact with the Superintendent or members of the Board of Education. Any contact will constitute grounds for disqualification of consideration. Questions about the RFP, its content, proposal format or any other questions deemed necessary to submit a qualified proposal must be submitted in writing to:

Gina Santa Maria, District Clerk
RFP for Strategic Planning Facilitation
Kenmore – Town of Tonawanda
Union Free School District
1500 Colvin Blvd
Buffalo, NY 14223
gsantamaria@ktufsd.org

Responses to all questions received will be posted on the District's website at ktufsd.org.

III. SCOPE OF SERVICES

Successful applicants will submit a proposal designed to address the following. Please compose the proposal by identifying each bulleted service:

- Customize the process aligned with KTUFSD's specific needs.
- Identify no more than three to four high-leverage strategic goals.
- Ensure inclusion of all stakeholders (community, parents, students, and staff) that is proportionately representative of the cohort district, and ensure all have an opportunity to provide structured input.
- Involve Board of Education members as an integral part of the process providing input, support and commitment.
- Facilitate conversations with stakeholders.
- Support the strategic planning committees and subcommittees in gathering and organizing internal and external environmental assessments.
- Help communicate the work of the strategic planning committee and subcommittees and the outcomes of their work.
- Keep the process on track, on time and on budget.
- Review existing planning and assessment documents, including the most recent strategic plan.
- Employ both Quantitative and Perceptive Data to guide KTUFSD in identifying priority goals/strategies.
- Outline a process to ensure implementation and evaluation of the plan with measurable key performance-based indicators/metrics.
- Ensure alignment with the current plan and processes.
- Describe the process for renewal of the vision, mission and beliefs.
- Utilize effective practices and trends within the educational industry, e.g., online learning and effective integration of technology.
- Include guidelines for resource allocation in the strategic plan.

The Proposal must identify the following:

- The consultant’s experience with public school districts, especially facilitating strategic planning processes.
- How the consultant/facilitator will use technology to streamline the process (i.e., electronic input), as well as sufficient opportunities for face-to-face input (i.e., public forums, focus groups) including any technology support needs KTUFSD would be expected to provide.
- Costs must be total and inclusive.
- Team members, including both the lead consultant, and team members, along with their curriculum vitae.
- How timelines will be aligned with KTUFSD needs.

Deliverables will include:

- Needs Assessment
- Methodology/Dissemination
- Assessment of Representative Stakeholders’ Input and Perspectives
- Preliminary Report and Recommendations
- Final Report, and Five-Year Vision and Strategic Plan

IV. CONTENTS FOR PROPOSALS

In order for proposals to be considered, said proposal must be clear, concise, complete, well organized and demonstrate both respondent’s qualifications, and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is important.

The proposals shall be organized in the format listed below and shall be limited to thirty (30) pages (excluding attachments and appendices) on 8 ½” x 11” paper with all responses bound with tabs separating each section. Respondents shall read each item carefully and answer accurately to ensure compliance with KTUFSD requirements. Failure to provide all requested information or deviation from the required format may result in disqualification.

A. Submittal Letter

Include the RFP’s title and submittal due date, the name, address, and telephone number of the responding firm. Include a contact person and corresponding e-mail address. The letter shall state that the Proposal shall be valid for a 60-day period and that the staff proposed is available

immediately to work on this project. The person authorized by the firm to negotiate a contract with KTUFSD shall sign the cover letter.

B. Description of Firm

This section should provide information regarding the size, location, nature of work performed, years in business and the approach that will be used in meeting the needs of KTUFSD.

C. Organizational Structure

Describe your firm's organizational structure. Provide the names of the professionals who will be responsible for this project. Please provide brief resumes for these individuals.

D. References and Description of Experience

This section should identify similar projects that the firm has completed as outlined in the RFP. Use this section to indicate the areas of expertise of your firm and how that expertise will benefit KTUFSD. Include at least three (3) school districts with similar demographics and student performance, along with the names of individuals familiar with your work that can be contacted by KTUFSD staff.

E. Project Overview

This section should clearly convey the firm's understanding of the nature of the work related to strategic planning and the general approach that will be used to implement a strategic plan. This section should include, but not be limited to, a discussion of the organization of the project and a summary of the proposed approach.

F. Cost

This section must provide a full description of the expected expenditures for the work described in this RFP. Cost proposed must include all consultant fees, preparation of deliverables, travel expenses per trip to the Town of Tonawanda (if applicable), printing, etc.

V. SELECTION CRITERIA

Firms submitting proposals are advised that all proposals will be evaluated to determine the firm deemed most qualified to meet the needs of KTUFSD. The selection criteria will include, but not be limited to, the following items:

- A.** Demonstrated understanding and responsiveness to the Request for Proposals.
- B.** Proposals and experience of firm and personnel named in the proposal.
- C.** Past experience assisting school districts in implementing strategic plans.

D. Project understanding and approach including an understanding of the District.

E. Satisfaction of previous clients. As noted in Section II.D above, provide at least three (3) references that reflect similar demographics and student performance, and are similar to the work contemplated in this RFP. Include the scope of work for each reference.

F. Oral interview (if applicable).

G. Completeness and quality of the proposal.

H. Cost

VI. PROCESS FOR SELECTING FIRM

The Board of Education will evaluate and select those firms deemed to be the most highly qualified to perform the required services.

The Board of Education may choose to interview any, all, or none of the respondents as may be in the best interest of KTUFSD. If interviews are held, selected firms will be notified as to place, time, date and purpose of the interview.

The names of all firms submitting proposals and the names, if any, selected for interview shall be public information. At the conclusion of the RFP process, the contents of all proposals become public information. Firms that have not been selected will be notified in writing after the conclusion of the selection process.