



## **Lebanon City School District**

### **Request for Qualifications for Strategic Planning Services**

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## **General Information**

### A. Purpose

This Request for Qualifications (RFQ) is seeking consultants to conduct a comprehensive and inclusive process to inform and collaboratively create the Lebanon City School District's Master Strategic Plan. This plan will include four core components:

- 1) Strategic Action Plan: Aligning the District's vision, mission, values, and goals to inform Board of Education and District administrative decisions and to define the District's role in the community.
- 2) Educational Service Plan: Establish student academic achievement standards and extra-curricular program goals, as well as the means to achieve those ideals.
- 3) Facilities Change Plan: Evaluate the district's projected growth in enrollment and current & future student and community needs to develop a facilities change plan that analyzes & proposes potential uses of district-owned buildings and land.
- 4) Financial Support Plan: Aligning current financial resources with strategic goals in order to determine future financial needs and strategies, including the development of an Economic Development Incentive Policy.

The Master Strategic Plan will guide the Lebanon City School District's operations and decision-making from July 1, 2024 to June 30, 2029. It will establish a framework for setting strategic priorities and operational goals while creating measurable and achievable service plans and timelines. The purpose of the strategic plan is to position Lebanon City Schools to proactively provide service that meets the changing needs of the community in a cost-effective manner and to educate stakeholders about Lebanon City School District's mission, vision, values, goals, and program.

### B. Who May Respond

This comprehensive project may require the use of more than one consultant with specific service area expertise. Individuals and firms interested in responding to a

specific area of this RFQ must be willing to work collaboratively and jointly with any other individual or firm chosen in order to create a cohesive, effective Master Strategic Plan. (As a specific example, meetings with District stakeholders should not be held separately for each firm.)

#### C. Instructions on Qualifications Submission

- a. *Closing Submission Date:* Qualifications must be submitted no later than 4:00 p.m. EST on Friday, November 17, 2023. It is the responsibility of the individual or firm to ensure that the proposal is received by Lebanon City School District by the date and time specified above. Late proposals will not be considered.
- b. *Inquiries:* Inquiries concerning this RFQ should be directed to Mrs. Karen Ervin, Treasurer/CFO at [ervin.karen@lebanonschools.org](mailto:ervin.karen@lebanonschools.org).
- c. *Submission Instructions:* Qualifications should be submitted electronically to Jessica Centers, Executive Assistant to the Superintendent at [centers.jessica@lebanonschools.org](mailto:centers.jessica@lebanonschools.org) by the closing submission date noted above.
- d. *Right to Reject:* Lebanon City School District reserves the right to reject any and all statements received in response to this RFQ.
- e. *Presentations:* At the discretion of Lebanon City School District, consultants submitting qualifications may be requested to make presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected individuals and firms. Not all individuals and firms submitting a proposal will be asked to participate in oral presentations.

#### D. Description of Entity and Scope of Work Requested

Lebanon City School District employs approximately 750 individuals who serve over 5,000 students throughout Warren County, Ohio. The District is governed by a 5-member Board elected by popular vote. Administrative offices are located at 160 Miller Road, Lebanon, Ohio 45036. Other buildings, including Bowman Primary School, Donovan Elementary School, Berry Intermediate School, Lebanon Junior High School,

Lebanon High School, and transportation/maintenance/food service buildings, are located throughout the City of Lebanon.

### **Technical Qualifications**

Submittals should include, and will be rated on:

#### A. Consultant Background & Experience

- a. Information about the consultant's history, including number of years in business, former projects, past clients, etc. Provide at least three references that we can contact.
- b. Prior history working with the Lebanon City School District, including specific project information.
- c. Qualifications of staff to be assigned to the project, including the education, technical training, and experience of each member of the team.
- d. Experience with educational planning initiatives and State program directives like an Equity Action Plan and the ODE's One Needs Assessment Plan.
- e. Specific team member experience leading and participating in meetings with the public on similar projects.
- f. Information about the consultant's current workload and availability for this project
- g. Consultant proximity to the Lebanon City School District for purposes of site visits and attending meetings with District representation

#### B. Consultant Approach & Philosophy

- a. Overall process for school district Master Planning. (Specify if you will not cover all four areas of the Master Plan.)
- b. Overall process for engaging and partnering with project stakeholders, including various community groups (i.e., YMCA, city governments, booster groups, libraries, etc.)

- c. Procedures for planning, estimating, and schedule development. Provide a tentative schedule with specific milestones and deliverables.
- d. Procedures for project budget development, including but not limited to, procedures for initial budget development and continued budget monitoring.
- e. Process regarding site visits and general oversight of the project
- f. Professional liability insurance coverage (amounts & types as applicable for this project) & claims history on similar projects for the last five years

C. Understanding Our Industry & Needs

- a. Provide specific industry knowledge and expertise you will use in this project.
- b. Describe current challenges and opportunities specific to the Lebanon City School District. Describe how you or your firm are best suited to assist our organization in facing those challenges and opportunities moving forward.
- c. The Lebanon City School District's current mission is *Building Community*, specifically *Building a Reflective, Respectful, Responsible Community*. Provide specific examples of how you will incorporate this mission into the core work and outcomes of this project.
- d. The Lebanon City School District has been working to implement a robust Multi-Tiered System of Supports (MTSS) program. Describe how this educational frame will impact your strategic planning work.

D. Understanding the Scope of Work

The consultant should clearly describe the scope of work to be performed in alignment with this RFQ. Specific items can include:

- Facilitate a strategic planning process using a methodology acceptable for similar organizations to Lebanon City School District.
- Perform an analysis of the political, economic, and social factors affecting Lebanon City School District.
- Engage internal and external stakeholders to gather critical input for the strategic decision making around goals.

- Develop strategic priorities (three+ year goals), strategies (one-year goals), KPIs, 90-day accomplishments, and action plans that align with the District’s mission, vision, goals, and values.
- Provide defined benchmarks for decision-making (i.e., number of students per classroom, number of increased enrollment/participation to hire additional staff, square feet per classroom, number of students per bus, etc.).
- Reflect the needs, voices, and interests of a changing and diverse community.
- Include a process for the Lebanon City School District to annually review and evaluate goals and develop new strategies based on the evaluation.
- Establish a method for evaluating progress and reporting on outcomes.
- Complete a student and community needs assessment that identifies the critical needs and disparities in the population we serve.
- Assess the overall risk within the proposed programs, activities, and goals.

## **Proposal Evaluation**

### A. Review Process

Lebanon City School District intends to select the consultant(s) that best meet its intended needs and purpose. Responses to this RFQ will be evaluated by a strategic planning committee established for this purpose.

### B. Evaluation Criteria

1. Consultant Background & Experience
2. Consultant Approach & Philosophy
3. Understanding Our Industry & Needs
4. Understanding the Scope of Work

See appendix for additional information.

C. RFQ Schedule

Friday, October 6, 2023	RFQ Issued
Tuesday, October 31, 2023	Deadline for questions submissions
Friday, November 17, 2023	Deadline for receipt of qualifications
Monday, November 20, 2023	Initial review of received qualifications
Monday, November 27, 2023	Evaluation of qualifications begins
Monday, December 18, 2023	Final decision is made



## **Appendix**

### **Sample Qualifications Evaluation**

Using the following form, Lebanon City School District staff and board members who are part of the qualifications evaluation process should score proposals individually. Evaluation of each proposal will be scored on the below four factors. Total points will be calculated from each reviewer, providing a total point value for each responding individual and firm.

<b>Proposal Evaluation</b>		
	<b>Point Range</b>	<b>Points Earned</b>
<p><b>Consultant Background &amp; Experience</b></p> <ul style="list-style-type: none"> <li>Number of years in business</li> <li>Experience &amp; references</li> <li>Adequate size and availability of the team</li> <li>Industry specialization – Qualifications &amp; experience</li> </ul>	<b>0-15</b>	
<p><b>Consultant Approach &amp; Philosophy</b></p> <ul style="list-style-type: none"> <li>Planning process</li> <li>Engagement process</li> <li>Project management</li> </ul>	<b>0-25</b>	
<p><b>Understanding Our Industry &amp; Needs</b></p> <ul style="list-style-type: none"> <li>Understanding our current challenges and opportunities</li> <li>Incorporation of <i>Building Community</i></li> <li>MTSS framework</li> </ul>	<b>0-30</b>	
<p><b>Understanding the Scope of Work</b></p> <ul style="list-style-type: none"> <li>Comprehensive methodology</li> <li>Engages a variety of stakeholder groups</li> <li>Delivers clear outcomes that emphasize intuitive visuals and graphics</li> <li>Realistic timetable</li> <li>Provides measurable goals and guidelines</li> </ul>	<b>0-30</b>	
<i>Total Points</i>	<b>0-100</b>	