

## REQUEST FOR PROPOSAL

Original Date Issued: August 27, 2024

Closing Date: September 27, 2024

Final Decision Date: October 17, 2024

Reference: 2024-2025 ICMA Strategic Planning Process Facilitation

### **Subject: Request for Proposal for 2024-2025 ICMA Strategic Planning Process Facilitation**

The International City/County Management Association (ICMA) has initiated a Request for Proposal (RFP) process to identify a qualified consultant to guide and execute a board and staff-driven visioning process, informed by a robust membership engagement strategy. The consultant will develop a strategic plan and implementation strategy that will provide direction for the organization as it moves into its next phase of growth and effectiveness in meeting its mission and the needs of its members.

ICMA seeks a consultant who has demonstrated experience in successfully developing consensus-based strategic plans, strong facilitation skills, proven experience in strategic planning with global nonprofit organizations, and a strong understanding of the structure and purpose of membership organizations.

Technical questions concerning this solicitation should be directed to Amber Snowden, Manager, Public Policy & Special Projects at [asnowden@icma.org](mailto:asnowden@icma.org) with a copy to [workwithus@icma.org](mailto:workwithus@icma.org). All contractual questions relating to this solicitation must be submitted to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org) with a copy to Amber Snowden at [asnowden@icma.org](mailto:asnowden@icma.org). Questions are due by September 16, 2024.

All communications must include the solicitation title, **2024-2025 ICMA Strategic Planning Process Facilitation**, in the subject line.

No communication intended to influence this procurement is permitted except by contacting the designated contacts above. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

This solicitation in no way obligates ICMA to award a contract nor does it commit ICMA to pay any cost incurred in the preparation and submission of a proposal.

ICMA bears no responsibility for data errors resulting from transmission or conversion processes. ICMA appreciates your responsiveness and looks forward to a mutually beneficial business relationship.

Sincerely,

Amber Snowden  
Manager, Public Policy & Special Projects

## **ABOUT ICMA**

ICMA is a 501(c)(3) nonprofit organization founded in 1914. Its mission is to advance professional local government worldwide through leadership, management, innovation, and ethics. ICMA achieves its mission by identifying leading practices to address the needs of local governments and professionals serving communities globally. Our more than 13,000 members commit to the ICMA Code of Ethics which has stood for integrity and transparency in public service for 100 years. In addition to advocating for the council-manager form of government and professional management in communities, ICMA provides member support, publications, data and information, peer and results-oriented assistance, and training and professional development to thousands of city, town, and county leaders and other individuals and organizations throughout the world.

ICMA has been an international organization since 1924. Since then, ICMA has developed and maintains relationships with local government organizations around the world to promote global knowledge exchange in pursuit of ICMA's goals of promoting good governance and its vision of creating thriving communities worldwide. In addition, ICMA provides technical assistance, training and peer-to-peer exchange opportunities to local governments around the world through grant and contract-funded initiatives, both in the U.S. and internationally, supported by federal government agencies, foundations, and corporations.

For more information regarding ICMA's programs and services, please go to [www.icma.org](http://www.icma.org).

## **BACKGROUND:**

ICMA has historically completed strategic planning on an approximately 10-year cycle. The current strategic plan, [Envision ICMA](#), was adopted in 2017. The plan, developed during a two-year process with input from a 40-member task force, established the strategic initiatives of Member Benefits and Growth, Learning Community, Thought Leadership and Resource Network, Advocacy and Outreach, and Governance and Operations.

Since the adoption of *Envision ICMA*, both the association and its members' communities have endured the challenges of a global pandemic and continue to adapt and develop the resiliency required to operate in an environment of rapid technological and societal change.

ICMA's commitment to prepare local governments to innovate and adapt as they respond to challenges impacting their work and their communities is currently focused on the following strategic initiatives:

- **Governance** – ICMA Executive Board, working with a member task force has recently undertaken efforts to identify and implement a new association governance structure to achieve ICMA's goal of being an effective, diverse, inclusive, and global organization.
- **Professional Development for the Future** – ICMA recently implemented a new learning management system (LMS) and is focused on optimizing the LMS to create an array of

engaging, high-quality, relevant, globally focused, and real-time learning experiences for local government professionals at all career stages.

- **Local Government Reimagined** – ICMA continues to provide thought leadership, knowledge resources, training, peer engagements, events, and technical assistance on the prevailing and emerging issues impacting local government leadership, management, and service delivery worldwide. Priority topic areas include public safety; economic mobility and opportunity; cybersecurity and artificial intelligence; sustainable, resilient, and equitable communities; and mental health and wellness.
- **Peer to Peer Networking** – ICMA is one of the largest professional networks in the United States, providing opportunities for our more than 13,000 members to share governance practices that improve the quality of life for their community members. We seek to continually grow our network, and through ICMA’s Annual Conference, Local Government Reimagined Conferences and global exchanges, we are connecting practitioners in the US and around the world to help them innovate and more effectively carry out their responsibilities.
- **Technical Assistance** – ICMA works with federal agencies, foundations, and other donors and sponsors to deliver technical assistance programming for local governments in the United States and internationally.
- **Implementation of ICMA’s Global Engagement Strategy and Roadmap** - Through the collective efforts of the Executive Board, ICMA members, business partners, international affiliates, staff, and other stakeholders, ICMA developed a global engagement strategy which the Executive Board adopted in June 2022. The strategy encompasses goals and objectives that guide ICMA’s efforts to realize its vision globally, ultimately advancing professional local government on a global scale. ICMA has adopted a global operating model to enable ICMA to continue to grow and improve as an organization, both in the US and internationally.
- **Racial Equity and Inclusion** – ICMA is focused on continuing to develop programming and content to support members and local government professionals worldwide in their ethical obligation to promote equity and inclusion in their communities.

## **PURPOSE**

Through this RFP, ICMA seeks a qualified and experienced consultant to facilitate a strategic planning process that will guide our association for the next three to five years. This process will require input from stakeholders, including ICMA’s members, the ICMA Executive Board, ICMA staff, as well as ICMA’s domestic and international partner organizations.

The strategic plan the consultant creates over the next year will need to provide direction for the organization as it seeks to broaden the impact and scale of its products and services, while enhancing member benefits and expanding membership. The new strategic plan will drive priorities, initiatives, and programs over the next three to five years, allowing ICMA to be more agile and responsive to changing events, and will be used as a supporting document for seeking future federal and foundation grants to expand and deepen our work.

## **SCOPE OF WORK**

The consultant will serve as a facilitator on the following:

- **Project kickoff:** Hold an in-person kickoff meeting to align key stakeholders (ICMA Executive Board and Leadership Team) around the purpose, scope, and timeline of the strategic planning process and clarify roles, responsibilities, and expectations. (Anticipated to occur in person at the ICMA Executive Board's quarterly meeting December 13-14, 2024 in Scottsdale, Arizona).
- **Discovery/Environmental Scan:**
  - Review ICMA materials to gain an understanding of the internal and external factors impacting ICMA and its members.
  - Analyze the information to identify key opportunities, threats, strengths, and weaknesses.
  - Prepare a clear and concise report, highlighting key insights.
- **Stakeholder Engagement:** Develop and implement a process to gather input from constituents, including ICMA Executive Board members, membership, and staff; as well as domestic and global organizations with whom ICMA partners. (Via virtual or in-person focus groups, interviews, surveys, and/or other methods).
  - ICMA desires a robust member engagement strategy, receiving member and stakeholder input both during the environmental scan process, as well as obtaining feedback on the draft strategic plan framework prior to final adoption.
  - The strategy will include engagement with ICMA's Executive Team, Leadership Team, and ICMA staff.
- **Development of Strategic Plan:** Hold an in-person "Strategic Planning Retreat" to engage ICMA's Executive Board and Leadership Team in a collaborative process with a shared vision of success and identified strategic priorities. (Anticipated to occur in person at the ICMA Executive Board's quarterly meeting February 21-22, 2025 in Windsor, Connecticut).
  - Develop a shared vision and mission statement to serve as guiding principles for the association's future direction.

- Establish measurable and achievable strategic goals and objectives which are aligned to the association’s vision and mission.
- Develop a strategic plan that outlines specific initiatives and activities to achieve the established goals and objectives.
- **Development of Implementation Plan:** Develop an action-based operational plan for implementation with metrics to measure results and ensure accountability.
- **Development of Communication Plan:** Develop a robust communication strategy to effectively communicate the strategic plan to members and stakeholders.

**Expected Timeline:** The selected consultant is expected to operate within ICMA’s desired timelines. ICMA expects to kick off the strategic planning process at the ICMA Executive Board quarterly meeting December 13-14, 2024 in Scottsdale, Arizona, present the final strategic plan for ICMA Executive Board adoption no later than September 2025, and develop an implementation plan and communication strategy no later than December 2025.

**SUBMISSION REQUIREMENTS:**

<b>Section 1.</b> Company profile:	<p>Please limit to no more than two pages. CVs or résumés will not count toward the page limit.</p> <ol style="list-style-type: none"> <li>1. Provide a description of your business.</li> <li>2. Provide the year established in the current business for the services requested in this request for proposal.</li> <li>3. Provide a copy of your annual report and include information on company size, number of employees and annual revenue.</li> <li>4. CVs or résumés of key personnel-in a leading paragraph, please indicate how much time each person will devote to this project and what other projects this person will undertake at the same time.</li> <li>5. List the company’s scope of services.</li> <li>6. Tell us what makes your business stand out in the industry.</li> </ol>
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<b>Section 2:</b> References:	<p>A description of the types and sizes of client organizations served, as well as a sample client list indicating the type of services rendered.</p> <p>Respondents should provide references as follows:</p> <ol style="list-style-type: none"> <li>1. At least three (3) examples of relevant work;</li> <li>2. The contact information should include the contact name, phone number, e-mail address, and website address. References will be contacted as part of the evaluation process.</li> </ol>
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<b>Section 3: Approach:</b>	Respondents should provide a detailed project plan and timeline that outlines key activities and deliverables with consultant and/or ICMA responsibilities clearly defined. This timeline should include initial planning meetings with ICMA leadership and a detailed plan for collaboration that illustrates approximate deliverables and completion schedule.
<b>Section 4. Pricing</b>	Provide a budget and/or pricing schedule, along with an accompanying narrative or notes, aligning with the Scope of Work.

### **CONTRACT TERM AND DELIVERY DATES**

ICMA expects this scope of work to be completed in a timely manner. Final delivery dates will be negotiated upon award.

### **EVALUATION AND AWARD PROCESS**

Offers will be evaluated based upon:

1. Ability to match the qualifications set forth in this solicitation
  - a. Company Profile, Proposed Personnel, Approach (25%)
  - b. References (10%)
  - c. Proposed Strategy/Workplan (40%)
  - d. Pricing (25%)

ICMA reserves the right to award under this solicitation without further negotiations. The respondents are encouraged to offer their best terms and prices with the original submission.

All proposals shall be reviewed to verify the bidder has met the RFP submission requirements. Proposals that have not followed the rules, do not meet minimum content/requirements and quality standards, or are nonresponsive to the required responses in this RFP will be eliminated from further consideration.

ICMA 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.

### **RFP PRESENTATIONS**

ICMA may select Respondents to provide presentations and/or demonstrations of their proposals to ICMA. The presentations and/or demonstrations will be completed via online conference, at ICMA's discretion. ICMA will not compensate and/or reimburse any selected consultants and/or firms for their labor and/or expenses related to the presentations and/or demonstrations.

### **INSTRUCTIONS TO THE RESPONDENTS**

Respondents interested in providing the services described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP. Adherence

to the proposal format by all respondents will ensure a fair evaluation regarding ICMA's needs. Respondents who do not follow the prescribed format may be deemed non-responsive.

A letter transmitting the proposal must be signed by an officer of the firm authorized to bind the respondent as required by this solicitation. The RFP response should include:

1. Transmission letter
2. Package no more than 30 pages excluding CV's or resumes and required forms
3. Completed and signed required forms

Packages must be submitted electronically to [workwithus@icma.org](mailto:workwithus@icma.org) with a copy to [asnowden@icma.org](mailto:asnowden@icma.org) with "2024-2025 ICMA Strategic Planning Process Facilitation" in the subject line. No phone calls please.

Applications received after the closing date stated on the top of page 1 will be rejected.

### **GENERAL CONDITIONS**

**Proposal Submission** - Late proposals and proposals lacking the appropriate completed forms will be returned. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA location other than the email address above. If changes are made to this solicitation, notifications will be sent to the primary contact provided to ICMA from each Respondent. ICMA takes no responsibility for effective delivery of the electronic document. The consultant offer will be rejected, if the consultant modifies or alters the electronic solicitation documents.

**Contract Award** - ICMA anticipates making one award under this solicitation. It may award a contract based on initial applications without discussion or following limited discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA may request additional data or material to support applications. ICMA expects to notify Respondents in approximately one month from the proposal due date whether Respondent's proposal has been selected to receive an award.

**Limitation** - This solicitation does not commit ICMA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA reserves the right to accept or reject any or all proposals received, negotiate with all qualified sources, or cancel in part or in its entirety the solicitation when it is in ICMA's best interest.

**Disclosure Requirement** - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or

members of any similarly governing body. If an indictment or conviction should come to the attention of ICMA after the award of a contract, ICMA may exercise its stop-work right pending further investigation or terminate the agreement.

**No Gifts** - It is ICMA's Policy that no gifts of any kind and of any value be exchanged between respondents and ICMA personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any ICMA procurements and may result in disciplinary actions against ICMA personnel involved in such discovered transactions.

**Equal Opportunity** - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

**Small and Disadvantaged Businesses** - ICMA shall use good faith efforts to provide contracting and procurement opportunities for Small and Disadvantaged Businesses (SDB). SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Underutilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.

**REQUIRED RESPONDENT FORMS:**

[W-9](#)

[ICMA Vendor/Supplier Form](#)