

REQUEST FOR PROPOSALS

Regional Strategic Plan for Aging

The Atlanta Regional Commission (ARC) is seeking proposals from firms or teams of firms experienced in Aging policy, strategic planning, and technical support to assist ARC in undertaking certain tasks related to the preparation of creating a Regional Strategic Plan for Aging. The contractor will not create the final plan. The contractor will conduct an environmental scan and community input research, analyze staff and community input to identify trends and needs, and synthesize all deliverables into reports which contain recommendations to create, evaluate and implement the regional plan. The Scope of Services for the work is attached as Exhibit A and provides more information regarding the level of effort required, as well as specific tasks to be accomplished.

The Atlanta Regional Commission adopted its first Regional Strategic Plan on Aging called [Live Beyond Expectations](#) in June 2015 for the period of July 2015 – June 2020. The plan's goals are to identify and understand the trends and issues impacting aging and to provide a framework and vision for ARC and partners across the region to collectively leverage resources to the address the focus areas identified. ARC seeks to update this strategic plan to prioritize and guide the work of the agency and other interested aging organizations as related to addressing the needs of older persons over the next five years. The strategy will encompass work throughout 10 Atlanta- metro counties. It will include input from stakeholders throughout the region.

The Atlanta Regional Commission (ARC) is the designated Area Agency on Aging (AAA) serving as the regional planning, development, and intergovernmental coordination agency for the Atlanta region, comprised of the 10 contiguous counties of Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, and Rockdale. ARC's Aging and Independence Services Group, in which the AAA functions are vested, is charged with both serving the needs of current older persons and planning and advocating for future needs and generations. Approximately 700,000 persons 60 or older live in the region constituting 35 percent of Georgia's older residents.

The ARC AAA serves as the steward of funds from the Older Americans Act, the Social Services Block Grant, the Elderly and Disabled Medicaid Waiver centralized intake program, several other state-funded programs for older adults, and a variety of public and private grants. With an annual budget of over \$28 million, the ARC AAA plans, funds and oversees services to older adults and persons with disabilities through a combination of direct services and partnerships with community service providers.

While the funding sources mentioned above are critical instruments for organizing and delivering services to older and disabled adults in the region, a broader collective impact framework has the potential to better coordinate across sectors and payment streams and achieve more ambitious results. This Plan will continue to offer a common vision to measure impact and evaluate progress in the identified priority areas.

Successful firms or teams of firms should be able to demonstrate experience in providing thorough strategic advice and technical support in a broad range of services and thought leadership related to aging persons' needs, policies and programs. The assignment of highly qualified and experienced staff to project deliverables and tasks is critical and will be closely evaluated during the proposal review process.

Available funds in 2019 for completion of the project will be approximately \$30,000. ARC reserves the right to award all or part of the available funds for this project. ARC anticipates that a contract will be awarded in June of 2019, with all work to be completed by December 31, 2019. The successful firm or team of firms should be prepared to begin work immediately upon contract execution.

ARC must receive bid proposals by email sent to Mary Blumberg, MBlumberg@atlantaregional.org in either Microsoft Word compatible format or a PDF file no later than 4:00 pm EDT May 10, 2019. Proposal shall not

exceed a total of 20 pages (8.5" x 11"). Cover pages, end sheets, resumes, budget exhibits, and an introductory letter shall not count against this maximum. Font size shall be a minimum of 12 point in all cases.

Additional information should not be required to respond to this RFP. However, technical questions should be submitted in writing by email to Mary Blumberg, MBlumberg@atlantaregional.org, no later than April 29, 2019. All questions received, and responses to those questions, will be posted on the ARC website no later than May 2, 2019.

ARC reserves the right to award this contract based on initial proposals received without formal interviews and to award all or part of this project to one or more firms. Proposal evaluation will focus initially on the written proposals. Should it be determined that interviews are required, a "short list" of firms will be selected from the proposals received.

Timeline	
April 12, 2019	Request for Proposals (RFP) Opens
April 29, 2019	Deadline to Submit Questions to ARC
May 2, 2019	Question & Answers Posted to ARC Website
May 10, 2019	Project Proposal Deadline
June 3, 2019	Projected Notification of Award
July – December 2019	Proposed Contract Period

Interested firms should submit a proposal that addresses the requirements listed below and the Scope of Services in Exhibit A. The Consultant should provide a detailed breakdown of the proposed budget and tasks breakdown following the general formats provided in Exhibits B and B-1.

Proposals must include the following to be considered responsive:

1. Name of lead firm/consultant and any sub-consultants.
2. Point of contact (name, title, phone number, mailing address, and email address) at lead firm.
3. Qualifications and technical competence of consultant/or sub-consultants in the type of work required.
4. Description of experience on similar projects including a list of at least 3 references within the past 5 years, with current contact information.
5. Listing of key project personnel and their qualifications.
6. A detailed description of the technical approach proposed for accomplishment of the work.
7. A proposed schedule and work plan for the accomplishment of the work described in Exhibit A.
8. A proposed project budget in the format of Exhibits B and B-1.

The review of written proposals will be based on the following evaluation criteria, with the relative weights in parentheses:

1. Experience and qualifications of key personnel (30%)
2. Technical approach (20%)
3. Demonstrated familiarity with metro Atlanta's aging network community (20%)
4. Work plan and schedule (10%) [*Note: This includes the consultant's ability to demonstrate a balanced workload for its staff to carry out its responsibilities to ARC in balance with any other contracts the consultant may have.*]
5. Demonstrated capacity to perform on schedule and within budget (10%)
6. Project budget (10%)

EXHIBIT A -SCOPE OF SERVICES

I. General:

The work to be accomplished by the Consultant is in support of the following ARC work program component: OAA Title III A - Administration (from B & C), Cost Center: 008AA1

II. Objective:

To assist in the development of a Regional Strategic Plan on Aging for July 1, 2020 – June 30, 2025. Tasks include identifying needs and setting priorities that will foster collective impact and coordination across sectors by providing a common vision. The Plan should include measurable goals to evaluate progress in serving the regions' older persons.

III. Work and Deliverables

A. Preparation and Research – In preparation and throughout the planning process, the consultant will create a project workplan; work with ARC staff to define roles and create a plan for the management of plan; and review past ARC Strategic Plan on Aging work. Using a sample of comparable Area Agencies on Aging strategic plans on aging implemented over the last five years, the consultant shall recommend format, layout and components for ARC's strategic plan.

Consultant Deliverables:

- i. Project Work Plan and Schedule (draft and final)
- ii. Recommendations for format, layout, and components of strategic plan

B. Environmental Scan and Community Input – Consultant will identify and conduct interviews with up to 20 key stakeholders and partners to capture trends in aging and gather their input for the plan. These stakeholders will include leaders in aging, business, government, and philanthropy. Interviews will be conducted one-on-one (may be by phone) or in small focus groups. In addition to above meetings, the consultant will design and facilitate 4 larger public meetings around the region to gather public input. The consultant will be responsible for designing the meetings to be dynamic and to encourage creative thinking about possible ARC goals and work areas. ARC staff may choose to gather additional input from committees and groups to provide additional information for consideration.

Consultant Deliverables:

- i. Report on output of environmental scan and stakeholder interviews
- ii. Agenda and plan for how to conduct dynamic community input meetings
- iii. Facilitation of /community meetings
- iv. Report on each community meeting

C. Analysis – Consultant will facilitate meeting of ARC leadership staff to prioritize ideas and suggestions from the community input phase.

Consultant Deliverables: Report on output

D. Synthesis – Consultant will lead ARC leadership staff team through setting a mission, vision, and goals, strategies and measurable outcomes for the Plan. Consultant will develop a report, inclusive of all sections and an executive summary that describes the process, summarizes findings, and outlines goals and recommendations. The plan should also include an implementation roadmap so that once development of the Strategic Plan is complete, the ARC can transition smoothly to implementation. The plan will cover a five-year period.

The plan shall be provided as a final deliverable and submitted in electronic format using design specifications provided by ARC.

Consultant Deliverables :

- i. Report on priorities set including process description, findings, ARC decisions on goals and strategies
- ii. Evaluation Framework

EXHIBIT B -Proposed Project Budget

	Additional Instructions	Calculation Instructions	Cost
1. Direct Labor	List by position all professional personnel participating in project	(Direct Labor Estimated Hours Rate) / (Hour Total Est. Cost)	\$
2. Overhead Cost	2 CFR Part 200	(Overhead Percentage Rate) X (Total Direct Labor)	\$
3. Other Direct Costs	List other items and basis for computing cost for each. Examples include computer services, equipment, etc.		\$
4. Subcontracts	For each, list identity, purpose and rate		\$
5. Travel	a. Travel by common carrier from/to the ARC offices: List number of trips and economy class airfare, plus taxi and shuttle fares, etc. b. Travel by private automobile within ARC area	b. (# of Days) x (Rate)	\$
6. Profit		(Percentage Rate) X (Basis)	\$
Total Estimated Cost:			\$

1. Direct Labor
 (Direct Labor Estimated Hours Rate) / (Hour Total Est. Cost)
 List by position all professional personnel participating in project

Total Direct Labor: \$_____

2. Overhead Cost
 (Overhead Percentage Rate) X (Total Direct Labor)
 2 CFR Part 200

Total Overhead: \$_____

3. Other Direct Costs
 List other items and basis for computing cost for each. Examples include computer services, equipment, etc.

Total Other Direct Costs: \$ _____

4. Subcontracts

For each, list identity, purpose and rate

Total Subcontracts: \$_____

5. Travel

a. Travel by common carrier from/to the ARC offices: list number of trips and economy class airfare, plus taxi and shuttle fares, etc.

b. Travel by private automobile within ARC area: list # of days x rate

Total Travel: \$_____

6. Profit

(Percentage Rate) X (Basis)

Total Profit: \$_____

Total Estimated Cost and Profit: \$_____

EXHIBIT B-1
Budget by Task

Phase	Type	Cost
Phase I	Research and Preparation	\$
Phase II	Community Input	\$
Phase III	Analysis	\$
Phase IV	Synthesis	\$
Total:		\$