



**Request for Proposals for:**

**Crossroads Community, Inc &  
Corsica River Mental Health Services, Inc.  
Integrated  
Strategic Planning Process**

**Request for Proposal Released:**  
Wednesday, November 16, 2022

**Deadline for Receipt of Proposals:**  
Wednesday, December 28, 2022, 4:00 p.m.

**Deadline for Questions:**  
Wednesday, December 14, 2022, 4:00 p.m.  
Direct all questions to [rfp@ccinonline.com](mailto:rfp@ccinonline.com)

## 1. INTRODUCTION

Crossroads Community, Inc, (CCI) is a nonprofit organization established in 1983, whose mission is to teach skills and access resources that empower people with behavioral health needs to live satisfying and productive lives. Headquartered in Centreville, MD, serving the five mid-shore counties: Caroline, Dorchester, Kent, Queen Anne's, and Talbot.

A subsidiary of CCI, Corsica River Mental Health Services, Inc (CRMHS) is a non-profit Mental Health and Substance Use Disorder (SUD) clinic. Our mission is to provide caring, effective, and accessible assessment and treatment to all mid-shore residents. We have clinics in Centreville, Federalsburg and Cambridge, Maryland, and telehealth availability.

CCI & CRMHS together are requesting proposals from interested, qualified, and experienced professional strategic planning firms or individuals to provide strategic planning and facilitation services.

CCI is seeking proposals, due no later than **4:00 p.m. EST on Wednesday, December 28, 2022**, from consultants/firms to guide the organization with the development of an integrated Strategic Plan. The anticipated Period of Performance will include a six-month period to provide adequate time for participation by the senior leadership team, CCI/CRMHS's Boards of Directors (Boards), in addition to input and review by employees, service recipients and key community stakeholders. The primary deliverable of this contract and process will be a long-term, written organizational strategic plan document that presents the planning process, research, analysis, opportunities, and strategies along with an implementation plan that will guide CCI/CRMHS activity for the next three to five years.

This RFP requests the professional services of a consultant/firm to facilitate the strategic planning process. CCI/CRMHS is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful consultant/firm should be able to discern which model or model(s) will best enable CCI/CRMHS to define, develop, and complete their organizational and programmatic goals as defined by the senior leadership teams, Boards, current contractual obligations, CARF accreditation requirements, best

practices as noted by Maryland Nonprofits Standards for Excellence (SFE) and other local, regional or state-level legislative priorities that impact CCI/CRMHS.

Based on the proposals received, the Strategic Planning Committee (SPC) (comprised of CCI/CRMHS's Executive Leadership Team and board members) will select individuals/firms to be interviewed. As a result of those interviews, the top-rated consultant/firm will be selected for contract negotiations. Proposals must be responsive to CCI/CRMHS's request and detailed in nature, specifically including experience of the offeror working with similar service providers. CCI/CRMHS will determine the most responsive and responsible consultant/firm providing the best service at the most reasonable cost. Cost alone shall not be the determinative factor. CCI/CRMHS reserves the right, in its absolute discretion, to make no award or contract. A Request for Proposals (RFP), which includes instructions for its completion, is attached.

### **1.1 Authority**

This document was developed with guidance and support from CCI/CRMHS's senior leadership team and board members at CCI/CRMHS, and welcomed involvement from service recipients, employees, community stakeholders and the public.

This document was prepared for use by internal organization audiences and industry partners. It should not be provided to external bodies without the express written or verbal consent of Holly R. Ireland, executive director.

### **1.2 Purpose and Scope**

This RFP is issued solely for information and planning purposes. Further, this document does not commit CCI/CRMHS to contract for any service, supply, or subscription whatsoever. CCI/CRMHS is seeking formal proposals at this time and will rely on your estimate based on the information provided in this document or other requested information. CCI/CRMHS will not reimburse any information or administrative costs incurred because of participation in response to the RFP. All costs associated with the response will solely reside at the responding party's expense.

### **1.3 Confidentiality**

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to CCI/CRMHS may be disclosed to another party or used for any other

purpose without express written or verbal consent. Prior to moving forward into the next phase of the selection process, vendors will be asked to sign a mutual non-disclosure agreement.

## **1.4 Audience**

This Request for Proposal is intended for organizations, executive coaching firms and consultants who have experience with the following, but not limited to:

- Strategic planning facilitation and development;
- Health care nonprofits; and,
- Public health and/or behavioral health care prevention, treatment, and recovery support service providers.

## **2. OVERVIEW**

### **2.1 About Crossroads Community, Inc (CCI) and Corsica River Mental Health Services, Inc. (CRMHS)**

CCI has 39 years of experience supporting people of all ages with complex behavioral health needs and disabilities in the mid-shore region. Deeply committed to a person-centered approach and philosophy, CCI/CRMHS helps individuals of all ages and abilities achieve optimal quality behavioral health, wellness, and meaningful community life.

CCI promotes community acceptance through advocacy and community education. Services are provided to those residing in the mid-shore region outside of our locations in Chestertown, Centreville, and Cambridge. Crossroads is accredited by the Commission on the Accreditation of Rehabilitation Facilities (CARF) for its Psychiatric Rehabilitation & Health Home Programs for Adults, Young Adults and Youth, Residential Rehabilitation Program & Supported Employment for Adults and Respite Care program for children. Crossroads is working with Behavioral Health Administration and Mid Shore Behavioral Health to expand Transitional Age Youth support and services to those 16 – 25 YO in the mid-shore region. Our Healthy Transitions Program is supported by a grant from Substance Abuse and Mental Health Services Administration.

With a rich history of innovation, CRMHS has developed a full array of community-based programs including outpatient behavioral health treatment, mobile treatment, care coordination, and homeless outreach. CCI/CRMHS are leading experts in the

delivery of person-centered, community-based care coordination services and behavioral healthcare treatment and recovery support services. In addition, CCI/CRMHS are advocates for policy and system changes that positively affect the lives of people with the most complex needs. More information about CCI/CRMHS is available at [Crossroads Community – Behavioral Health Recovery \(ccinonline.com\)](http://ccinonline.com) and [Mental Health and SUD Clinic - Corsica River Mental Health Services \(crmhsinc.com\)](http://crmhsinc.com)

## **2.2 Project Background**

CCI/CRMHS have a long history of creating short-term strategic plans separately for each organization, which included goals and objectives, most recently in the areas of Growth and Sustainability, and Coworker Retention. In the past, the strategic planning process involved minimal collaboration from front-line coworkers and the Board of Directors.

CCI/CRMHS is seeking to take its strategic planning process to the next level with a single, integrated strategic plan. In addition to broadening its scope of individuals, both internal and external, who participate in the strategic planning process, CCI/CRMHS would like review and guidance including but limited to the following areas: market and environmental analyses of Maryland and surrounding states; situational analysis and human capital talent.

## **2.3 Project Scope and Phases**

Scope of Service Required - To develop and complete a comprehensive strategic planning process from February 1 through July 30, 2023. As envisioned, the scope of services for this proposal will include the following phases:

### **2.3.1. General Project Management**

- The consultant/firm will work with the Strategic Planning Committee (SPC) comprised of board members and leadership from both organizations, CCI/CRMHS.
- The consultant/firm will develop and finalize the strategic planning process; validate CCI/CRMHS's objectives for this project; and outline SPC, Board, staff, and consultant roles and responsibilities for the project.
- The consultant/firm will develop a work plan to guide project activities and communications.

- The consultant/firm will conduct an orientation and multiple briefing sessions for the SPC, and Board on project goals and the potential outcomes.
- The consultant/firm must be available for presentations to the SPC and Board, including a presentation of the final version of the strategic plan developed through this project.
- Development and implementation of techniques/initiatives to promote public involvement designed to engage the community, stakeholders, and CCI/CRMHS's leadership throughout the process is critical.

### **2.3.2. Phase 1 – Discovery**

- Complete an inventory of existing contractual obligations, program offerings and partnerships to serve as a baseline to identify service gaps and opportunities for integration and expansion.
- Conduct stakeholder interviews and/or focus groups with staff, key stakeholders, partners, community leaders and constituencies. The purpose of the interviews will be to complete an evaluation of internal (e.g., organizational leaders, Board members, front-line employees) and external stakeholders (e.g., small client sample, contractor feedback, contract information) to gain an understanding of stakeholder interests, goals, objectives, and envisioned opportunities, as well as opportunities for improvement for CCI/CRMHS. The interviews may include SPC, board, care coordinators, administrative staff, leadership of local government entities including members of the Maryland Department of Health.
- Complete market and environmental analyses in Maryland and surrounding states including an evaluation of relevant existing and new markets. This would include compiling, analyzing, and presenting service-related data, identifying potential areas of growth within and outside the State of Maryland.
- Complete an assessment of internal human capital talent to determine CCI/CRMHS's ability to sustain and grow through new innovations, partnerships, and relationships, as well as identify potential change leaders within the organization. This can be accomplished via group meetings, individual meetings, research and/or market analyses.
- Conduct a situational analysis of CCI/CRMHS as an organization to identify and assess the strengths, weaknesses, opportunities, and threats to the mission/purpose of CCI/CRMHS or areas that may prevent us from achieving our goals (e.g., SWOT analysis).

### 2.3.3. Phase 2 – Meet and Retreat

- CCI/CRMHS envisions holding a one- or two-day board retreat dedicated to this effort. We seek input from the consultant/firm to help structure and facilitate the event to maximize impact.
- Meeting topics will align with information and data collected during discovery and may include:
  - **Organizational Overview** - Assessment of the strengths, weaknesses, and competencies of the organization.
  - **External Overview** - Assessment of opportunities and threats facing CCI/CRMHS in coming years. The assessment will include information on availability or significant limitation of resources and tools that CCI/CRMHS could use to add value and further its goals, including expanding business outside of the State of MD.
  - **Methodology** - The consultant will describe the methodology used to identify vital challenges and opportunities identified.
  - **Identification of Opportunities, Strategies and Vision** - Refining the vision for CCI/CRMHS which identifies its priorities, opportunities, and strategies, and clarifies CCI/CRMHS's role and confirms its mission and values.
  - **Defining Future Access or Limiting Factors** - Fiscal needs/implications related to potential strategic pathways.

### 2.3.4. Phase 3 – Document and Vet

- Following the retreat or other collaborative planning meetings, the consultant/firm and the SPC will draft a strategic planning document for review and presentation to CCI/CRMHS's Board. This document should be a strategic plan that will position CCI/CRMHS to remain sustainable and competitive in the market that includes clearly defined actionable steps and milestones.
- The consultant/firm will participate in the drafting, review, and refinement of this document. The plan will reflect the findings and outcomes of prior project phases and propose next steps to incorporate the consensus of findings into the organization's strategic plan.
- The SPC and the consultant will work collectively to develop a series of communication and input techniques designed to keep the Board, staff, key partners, community stakeholders, and business leaders engaged in the identified goals, objectives, and initiatives of the Strategic Plan. At a minimum, the consultant will provide the following deliverables:
  - A draft Strategic Plan document,
  - An executive summary of the draft Strategic Plan; and,

- A communication plan that includes a recommended package of material suitable for public distribution and outreach to the board, staff, and key stakeholders.

### **2.3.5. Phase 4 – Approve and Launch**

The consultant will lead production of a final Strategic Plan document that includes an implementation plan with defined milestones and benchmarks that CCI/CRMHS's SPC and Board can use to manage CCI/CRMHS's activities and measure its progress, including regular audit periods, as necessary. This document will be presented for approval by the SPC and Board of Directors.

## **3. REQUESTED INFORMATION**

### **3.1 Purpose for the RFP**

With this RFP, CCI/CRMHS is requesting information regarding your company/ organization and services related to strategic planning. The proposal provided will give CCI/CRMHS a baseline of the cost metrics associated with the submitted solution(s) with the understanding that it will need to be refined based on subsequent clarification with CCI/CRMHS, as well as the potential scope change throughout the subsequent process.

### **3.2 Proposal Submission Requirements**

Each consultant/firm intending to submit a proposal shall send a statement of intent via email to [rfp@ccinonline.com](mailto:rfp@ccinonline.com) by December 1, 2022. The answers to any questions received will be provided to all who have submitted a statement of intent.

Each consultant/firm shall be responsible for preparing an effective, clear, and concise proposal and should be **no more than 15 pages**. Proposals should be submitted in **PDF format** with one-inch margins and a font size of 12.

In addition, to completing Appendix A, proposals should contain the following information:

1. A cover letter introducing the consultant/firm and the individual who will be the primary contact person.



2. Proposed statement of work, project approach and plan to accomplish the work. Describe in detail your firm's project approach and methodology in managing and implementing a project of this size and scope and experience of developing and supporting the implementation of a comprehensive strategic plan. Key elements include:
  - 2.1. Project Understanding,
  - 2.2. Project Methodology and Deliverables,
  - 2.3. Roles & Responsibilities,
  - 2.4. Project Management.
  
3. Answers to the following questions:
  - 3.1 Detail your success and experience with companies of comparable size, structure, and business lines where you were charged with meeting the same/similar objectives.
  - 3.2 What challenges do you anticipate encountering, if any, in the execution of this work? How do you plan to mitigate those challenges?
  - 3.3 In your opinion, what role/value does the mission of an organization play in the development of their respective Strategic Plan? How do you ensure that the "voice of the mission" emerges, and is sustained, throughout the process of assisting an organization to develop and execute its Strategic Plan?
  - 3.4 Describe how you will approach facilitating a multiple-member meeting to elicit insight and foster consensus. How do you promote idea sharing and ensure each member's voice is included?
  - 3.5 Based off what you know about CCI/CRMHS, who and how would you engage external stakeholders?
  - 3.6 Has your organization worked on projects where consultant compensation is contingent/outcome based? If yes, please include an alternate fee structure based on achievement of outcomes.
  
4. A statement that the consultant/firm is registered and insured to conduct business in the State of Maryland
5. Specific qualifications regarding experience in strategic planning services, including the names of clients doing similar work to CCI/CRMHS or in healthcare fields.
6. A detailed timeline for completion of each phase and the total project. CCI/CRMHS is interested in pursuing this strategic plan as quickly as possible.
7. A description of the firm's organization and staff's qualifications.
8. A description of two to three projects of a similar scope, magnitude and complexity to the work described in this solicitation and outcomes of the projects.

9. A pricing narrative that does not exceed \$25,000 with a proposed fee schedule for each phase of the project including any incident or travel expenses.
10. The signature of an authorized individual to bind the firm. The proposal must be a firm offer for a 60-day period.

The answers provided in your response will be evaluated by the SPC. The following guidelines should provide clarification around responding to the RFP. However, should additional assistance be required, a contact person has been listed below for guidance.

### **3.3 Response Delivery**

Please submit all responses in PDF format via electronic delivery by **4:00 p.m. EST on Wednesday, December 28, 2023**, or sooner to [rfp@ccinonline.com](mailto:rfp@ccinonline.com). **Questions requesting clarification may be submitted through Wednesday, December 14, 2022, to [rfp@ccinonline.com](mailto:rfp@ccinonline.com).** Communication directed to parties other than the individual listed may result in disqualification of your company's response.

Any response received after the date specified for receipt will not be considered without prior written or electronic approval.

All RFPs (Request for Proposals) will be evaluated as received and included in the following process:

- Review and scoring of the responses, as well as clarification of information as determined necessary by the project team at CCI/CRMHS.
- Identification of two to three final candidates to conduct in-depth review of capabilities, including virtual interviews specific to CCI/CRMHS processes and requirements.
- Providing recommendations to the SPC on the ongoing service cost and an estimated implementation timeframe.

### **4.0 ELIGIBILITY**

Each offeror shall specifically identify in its proposal whether any potential or actual Organizational and Consultant Conflicts of Interest (OCCI) exist for this procurement. If the offeror believes that no OCCI exists, the OCCI response shall set forth sufficient details to support such a position.

Offerors shall submit with their proposal an OCCI certification, using the following language:

“The offeror [ ] is [ ] is not aware of any information bearing on the existence of any potential organizational conflict of interest.”

If the offeror is aware of information bearing on whether a potential conflict may exist, the offeror shall provide a disclosure statement and mitigation plan describing this information. Prospective consultants/firms are not eligible to submit a proposal if current or past corporate and/or other interests may—in the opinion of CCI/CRMHS—give rise to conflict of interest in connection with this RFP or the Services. Consultants/firms are to submit with their proposal documents a description of any issue that may constitute a direct or indirect conflict of interest for review by CCI/CRMHS. CCI/CRMHS’s decision on this matter will be final.

## **5.0 FACILITIES**

The primary place of performance shall be at CCI/CRMHS’s central office building located at 120 Banjo Lane, Centreville, MD. The Consultant shall attend meetings and perform various tasks either in-person at CCI/CRMHS or virtually via MS Teams or Zoom video conferencing during the period of performance.

CCI/CRMHS staff will provide space for meetings with consultant personnel as directed by CCI/CRMHS. CCI/CRMHS staff will collaborate with the consultant/firm in arranging meetings with SPC, Board, staff, and key stakeholders.

No overnight stays will be reimbursed.

## **6.0 CONTRACTOR TRAVEL**

Any contractor travel costs are to be included in the pricing offer. No additional reimbursement for travel or other expenses related to completing this project will be approved.

**APPENDIX A: RFP RESPONSE FORM**

<b>Organization/Company's Name:</b>	Click or tap here to enter text.
<b>Responder's Name:</b>	Click or tap here to enter text.
<b>Responder's Title:</b>	Click or tap here to enter text.
<b>Responder's Email Address:</b>	Click or tap here to enter text.
<b>Responder's Phone Number:</b>	Click or tap here to enter text.
<b>Organization/Company's Website:</b>	Click or tap here to enter text.
<b>Main Product/Services:</b>	Click or tap here to enter text.
<b>Main Market/Customers:</b>	Click or tap here to enter text.
<b>Number of Years in the Market:</b>	Click or tap here to enter text.
<b>Company Location (s):</b>	Click or tap here to enter text.
<b>Number of Employees:</b>	Click or tap here to enter text.
<b>Notable Acquisitions:</b>	Click or tap here to enter text.
<b>Key Business Partners:</b>	Click or tap here to enter text.
<b>2021 Gross Revenue:</b>	Click or tap here to enter text.
<b>2021 Net Income:</b>	Click or tap here to enter text.
<b>Return on Investment:</b>	Click or tap here to enter text.
<b>Reference #1 Name:</b>	Click or tap here to enter text.
<b>Reference #1 Phone Number:</b>	Click or tap here to enter text.
<b>Reference #1 Email Address:</b>	Click or tap here to enter text.
<b>Reference #1 Company Name:</b>	Click or tap here to enter text.
<b>Number of Years Reference #1 Has Been a customer</b>	Click or tap here to enter text.
<b>Reference #2 Name:</b>	Click or tap here to enter text.
<b>Reference #2 Phone Number:</b>	Click or tap here to enter text.
<b>Reference #2 Email Address:</b>	Click or tap here to enter text.

<b>Reference #2 Company Name:</b>	Click or tap here to enter text.
<b>Number of Years Reference #2 Has Been a customer</b>	Click or tap here to enter text.
<b>Reference #3 Name:</b>	Click or tap here to enter text.
<b>Reference #3 Phone Number:</b>	Click or tap here to enter text.
<b>Reference #3 Email Address:</b>	Click or tap here to enter text.
<b>Reference #3 Company Name:</b>	Click or tap here to enter text.
<b>Number of Years Reference #3 Has Been a customer</b>	Click or tap here to enter text.