



REQUEST FOR PROPOSALS VELA STRATEGIC PLAN

PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in utilizing a participatory planning process that engages diverse stakeholders to result in VELA's five-year strategic plan.

VELA OVERVIEW

When told that your child has a disability, your life is forever changed. Research shows parent involvement to be the greatest indicator of positive health and educational outcomes for children with disabilities, yet parents report feelings of confusion and powerlessness when navigating doctors, therapies and special education for their child. This is especially problematic for the majority of families served by VELA, who are underserved, live below the poverty level and experience language and cultural barriers. Without an informed and supported parent, the child will miss key developmental, academic and community-based resources resulting in limited opportunities and marginalization as an adult. In response to this immense gap in services, VELA was founded in 2010 with a mission to empower underserved Spanish and English-speaking parents of children with disabilities. Through interactive and culturally responsive courses and wraparound services, families gain knowledge, empowerment, resilience and community to ensure that their children thrive. In the last 10 years, VELA has grown from a 100% volunteer run agency to having 9 staff, a strategic and diverse board, and a community of committed volunteers. In 2020, VELA served 1,834 individuals across 75 zip codes through both in person and virtual program offerings, at no cost to families.

As we enter our 10th year, we are eager to set the course for the next 3-5 years. As the needs of families of children with disabilities evolve, we want to be certain that our growth aligns with community needs, gaps in services and our own vision, capacity and sustainability. For the last 10 years, we have offered interactive courses, workshops, support groups, case management and Family Fun Days. Until 2020, those services were all in person, either at VELA's East Austin Space or held on school campuses. In 2020, we launched our virtual programming and have remained virtual since with a plan to return to in person services in January of 2022, while also providing virtual services. Through our service delivery, we continue to observe the pattern of families accessing VELA only after spending years struggling navigating systems; this results in our response often having to be that of repair versus building. For the future of VELA, we are



eager to explore a more upstream and integrated model that includes (or does not depending on what this process reveals) 1) the expansion of VELA's virtual programming into other geographies 2) integrating VELA's courses/workshops into schools 3) designing and implementing an integrated healthcare referral model for embedded referral to VELA once a diagnosis is made. Through this strategic planning process, our expectation is that the feasibility of these models can be explored in the context of other questions below. As we enter the next 10 years, we want to set the course to grow into the directions that allow us to both serve more families in the best way possible and also scale our organization sustainably.

SCOPE OF WORK – KEY DELIVERABLES:

We are seeking experienced consultants who can facilitate and work with our board, staff and other key community stakeholders to develop strategies including exploration of growth models, development of strategic goal(s) and relevant key performance indicators that lead to creating a strategic plan. As a result of the planning, operational structure, key partnerships, and revenue streams, plans will be developed to support the strategy. The five-year strategic plan will capture organizational milestones set for the 1st, 3rd and 5th years of the plan.

The strategic plan should answer critical questions including, but not limited to the following:

Programming

1. What are the **options we should consider as a core strategy regarding programming and services in the future?** What element of our programming should we grow? What is our growth strategy- digital? Train a trainer with in person delivery and training? Integration into schools? Courses only? What happens to wraparound services? What is uniquely ours that makes the most sense to scale/ what does not. What if any should be our role around professional development training for schools, healthcare, etc.
2. **Identify competitors** and compare our organization and services to similar organizations in Central Texas and the state of Texas? Determine the strengths and weaknesses within the markets and identify strategies that will provide VELA with a distinct advantage. Are there possible mergers or partnerships that need to be considered versus just growing VELA?
3. What does a **market analysis** tell us about the current and future demand for VELA services in the Austin area? What obstacles may present themselves to pursuing and expanding upon VELA services and how might we address these obstacles? What additional outreach (advertising, marketing, branding) resources are needed to expand services? What is our market share?



4. **What will this industry look like in 3-5 years?** What local, state and national implications/impact/opportunities need to be considered? What is the addressable market?
5. What other **organizations, partners, and key stakeholders** – private, non-profit, governmental, higher-education, philanthropic, employer, etc. – need to be involved and why? - Which funders might support this? Identify other top partnerships (explain criteria used) by stakeholder segmentation (at least 2) and describe opportunity.

Additional Questions:

- What are Austin's unique social/demographic needs today and in the future? - What is the best core strategy to address organizational/community needs through providing educational opportunities to families? What would potentially be the biggest impacts to VELA the organization?
- DEI: How can we grow into being a disability-centered organization? Connecting into self-advocacy and lives of self-determination. Current versus future and how do we get there?
- What research supports our model? How can we communicate that clearly to stakeholders?
- How can we move into developing parent leaders that become the next ambassadors, VELA facilitators, advocates, including creating platforms to move their leadership into trustee roles, legislative advocates, etc. What does that journey look like? What resources would be required?
- How can we create better interconnectedness so a family with a child with disability knows exactly what to do, who to call and when? (ex: VELA welcome kits- can serve families but also serve providers in that they have something to give families, example of someone who does this well)
- Are there needs in the community that we are not addressing related to disability that we should be? And as a result are we missing out on any funding avenues not currently



pursued, for example, intergenerational grants, working with a child directly, older transitional programs, etc. Identify, describe opportunities, and make a recommendation.

Impact

1. What are the **benefits for each type of stakeholder (non-family)**- education, healthcare, funders, etc. In other words, how does a healthcare partner/referral source benefit from having their patient participate in VELA? What is the buy-in for these partners? How do we engage the community more effectively to feel ownership for families with a child with a disability?
2. How does **VELA's programming positively impact the community** (how do non-participants benefit from VELA being in existence?) What social determinants of health are impacted? How do we quantify this?
3. What should we **start to measure/stop measuring?** What are the long term goals and **KPIs?** How should we be sharing impact? How do we create a process for measuring that (we are already doing LOTS of data collection but we are not analyzing it or sharing it with the community) What metrics should we be using to showcase stories? Future CRM for this and/or other resources? What are KPIs/ benchmarks that make sense? Number of families? Change over years? Number of schools? Are there student outcomes we can use? What research can we tie back to to connect to impact? (our version of \$__ invested in early childhood saves \$__ in the future)
4. What would be needed for VELA to be further upstream in the process for families- to support building, versus repairing? What would it look like to explore an **integrated service model**, as seen with some mental health providers or after school programs? Embedding Special education training into schools? Creating an integrated referral process from specialist to VELA? Is healthcare or educational integration or both the most impactful? What are the opportunities, barriers and risks here?
5. What **organizational milestones should be reached** at one and three years in order to support the five-year plan for the organization?

Operations and Infrastructure

1. What are the **talent and resources needed** to staff and sustain the future goals of VELA? What do we need to grow into options? And what support/benefits do those staff have? How do we scale up to that?



2. What **systems, policies and practices need to be in place** to mitigate risk and support growth?
3. What are **training models we can learn** from to ensure that future facilitators teach with fidelity and VELA culture/special sauce? What train a trainer models can we emulate that are transformational and rooted in leadership versus just service delivery?
4. **How does the board evolve** as the organization evolves? Ensure DEI in visioning and growth.

Financials

1. **Financial Scenario Planning** (what are 1-3 paths to get there to achieve our growth plans?) including fee for service models and pricing. Include staffing models to support each scenario. Set 1, 3 and 5 year goals.
2. What is a **sustainable funding strategy** considering private and public resources, earned income streams, and strategic partnerships? What are the top five partnerships we should pursue and why?
3. Identify what we need to be aware of re: risk as it relates to philanthropic trends and current economic conditions and opportunities.
4. Create a 6-10 year P&L by using year 5 that includes specific assumptions for example market growth (families served), headcount needed, inflation, etC. The deliverable is a financial exercise with assumptions using our historical financial data

SCOPE OF WORK – PROCESS & PRIMARY ACTIVITIES:

- Work with present Board Members, staff, past and current families, community partners (i.e. funders, program partners, volunteers, etc.) to design a clear strategic plan for VELA. This process will begin Jan 2022 (start of fiscal year).
- Make certain that the participatory process is inclusive of Spanish and English speaking stakeholders (focus groups and/or interviews with Spanish-speaking families to be held in Spanish, separately) and that in person and virtual processes are engaging, interactive and adapted for varied literacy levels. Written materials need to be translated into Spanish and reviewed by VELA to ensure accuracy before sharing with families.
- Identify major economic, political, social, environmental, legal or technological trends and how that might impact VELA and/or its students and families. Recommend risk minimization/limitation.



- Identify organizational goals that will serve as a 'north star' to the efforts and resources of VELA and help evaluate any future opportunities.
- Develop a timetable of implementation with specific measurable benchmarks, objectives and tasks to accomplish to achieve these goals.
- Identify clear, measurable outcomes and KPIs for how to measure organizational and strategic effectiveness, impact, and success. Key one- and three-year milestones should be identified that support the execution of the longer five-year strategic plan.
- Establish a framework and process for VELA's leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
- Facilitate all meetings and record meeting notes. Provide leadership, direction and expert consultation and advice related to the development of an effective strategic plan, including successful implementation.
- Deliverable should be a clear, easily consumed, strategic planning roadmap accompanied by a strategic planning timeline, implementation, evaluation methodology, and communication plan. Communication plan should provide guidance for sharing the plan with key stakeholders including, but not limited to, staff, board, partners, and donors.

PROJECT TIMELINE & REQUIREMENTS:

This RFP represents the requirements for an open and competitive process. Proposals will be accepted until 5pm CST on December 31st. Interested parties can submit an LOI to inform VELA of their interests in applying before submitting a proposal. If additional information or discussions are needed with any bidder(s), the bidder(s) will be notified. We will work toward selecting a contractor no later than January 31, 2022 so that work can begin on a facilitated planning process to be completed no later than 16 weeks from the start date.

Proposals may be submitted to Susanna Olivarez, Board Chair: SOlivarez@ascension.org with the subject line: VELA Proposal

The following requirements are to be addressed in the proposal for consideration:

- VELA is seeking proposals from applicants who are capable of addressing all of the above stated needs and who can provide additional expertise to support VELA and the community it serves to achieve a successful project outcome.
- While VELA leadership understands that completing this project requires significant and active Board, staff and member involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables (e.g. writing organizational assessments, writing the actual strategic plan, etc.).



- Applicants are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements (schedule) for all activities involving their participation.
- Proposals must include a clear description of the applicant's plan to complete all of the project components (i.e. in what order the projects will be completed, the methodology, how long each component will take to complete, etc.).
- Applicants must include in their project timelines "check-in" points for VELA to be provided with project status updates. As work products/deliverables are completed prior to the established check-in points, applicants will be required to send VELA these materials to facilitate the status update meetings and/or conference calls. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/call, sending out meeting invites and writing meeting minutes.
- In addition to the check-in meetings, the applicant will be expected to present a status update on their preliminary findings and recommendations at mid-point and prior to writing the final project deliverables and strategic plan.
- The budget for this project shall not exceed \$15,000. VELA invites applicants to provide all or part of the service as an in-Kind donation to VELA. We will offer appropriate recognition of the gift based on current sponsorship benefits.

EVALUATION CRITERIA:

In awarding a contract for consulting services to develop a five-year strategic plan for VELA, we will examine a number of factors and criteria will include:

- The extent to which the proposal addresses the stated needs and clearly describes the scope of work;
- History of DEI work in the community, specially as it relates to disability services, educational and health equity.
- Specific plans or methodology to be used to perform the services, including experience facilitating feedback from diverse groups;
- Qualifications and experience of the firm and the consultant(s) in providing strategic planning development; please provide history of firm, # of professional employed, and experience of consultants that will support this proposal;
- Availability for work to be conducted between Jan 2022-April 2022 with strategic plan final product shared 12 weeks after start date.
- Project cost and project-relevant, provide two client references.