



## **Request for Proposal (RFP): Strategic Planning Retreat OPCA**

**Date Issued: June 1st, 2019**

**RFP Due Date: June 30<sup>th</sup>, 2019, 5pm**

### **INFORMATION FOR BIDDERS**

**OPCA Background:** The Oregon Primary Care Association (OPCA) is a nonprofit, 501(c)(3), membership association, founded in 1984. Our members include all 32 of Oregon's community health centers, also known as federally qualified health centers (FQHCs), other safety net clinics, and those who support them. Our mission is to lead the transformation of primary care to achieve health equity for all.

OPCA provides technical assistance and training to our community health center members. Additionally, OPCA represents its members and beyond, acting as an advocate to governmental agencies regarding policy at the state and federal level. The organization currently employs 25 people (22.5 FTE) with revenues of ~\$2.8M. The majority of employees are of service to member clinics providing consulting services, advocacy, training, and more in support of our mission and strategic plan. There is also a small team of administrative personnel in areas such as accounting, human resources, operations, IT Support, etc.

OPCA also has a 501(c)(4) related organization named Community Health Advocates of Oregon (CHAO). CHAO's mission is to reform and expand access to a comprehensive system of high-quality health care, especially health care services to individuals who experience significant barriers to care, i.e. the uninsured, low-income populations, rural isolation, etc. this is done by advocating for policy change to improve the health care delivery system, focusing on policies to improve the effectiveness of primary and preventive care, and supporting community-based solutions to address the healthcare needs unique to each community. **CHAO has moved into dormancy.**

OPCA receives funding from grants, contracts, membership dues and fees. We receive government funding from the US Department of Health and Human Services, and multiple grants/contracts from multiple foundations/entities. We have 25 employees located in our downtown office. Our annual revenue has ranged between \$2,530,661 and \$2,674,149 over the past 3 years.

**Purpose:** Oregon Primary Care Association (OPCA) invites proposals for one or more of the following activities:

- **Strategic Planning Retreat Facilitation:**

Pre-retreat planning:

- Work with the Sr. Manager of Strategic Planning and Evaluation to create an agenda and design an effective day long retreat.
- Work with the Senior Leadership Team to incorporate direction from OPCA leadership
- Work with the Strategic Planning Committee, a board committee tasked with providing guidance for the strategic plan and retreat.

Day of facilitation:

- Provide interactive group facilitation of agenda, elicit group feedback and input to add value to the creation of the next iteration of OPCA's strategic plan

-Be able to act on the fly, make on the spot changes as necessary to ensure the end result meets OPCA and member needs

-Provide content expertise on strategic planning and strategy execution

Post-retreat duties:

-Work with the Sr. Manager of Strategic Planning and Evaluation, Senior Leadership Team and Strategic Planning Committee to create a document that accurately captures the sentiment and information elicited during the retreat

-Ensure the final product is actionable for OPCA and appropriate for distribution to membership

- **Content Knowledge Expert – Integrated Network- Day of**

-Be able to facilitate a conversation with OPCA board, members and staff about next steps for an integrated network

- **Content Knowledge Expert – Board Membership Development and Structure – Day of**

-Provide guidance and recommendations for high functioning board structures

-Elicit feedback and input from board and membership

-Work towards consensus on next steps

### SCOPE OF WORK & TIMEFRAME

OPCA is seeking proposals for one or more of the following services:

1. Strategic Planning Retreat Facilitation
2. Content Knowledge Expert – Integrated Network- Day of
3. Content Knowledge Expert – Board Membership Development and Structure – Day of

OPCA's Strategic Planning Retreat will take place on November 14<sup>th</sup> in the Portland Metro Area. Final Strategic Plan to be completed by the second week in January.

### PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS

**Questions:** Please direct all questions to Sarah Dryfoos via email ([sdryfoos@orpca.org](mailto:sdryfoos@orpca.org)) and those questions will be routed to the appropriate person for response. Subject title should list "Question - RFP: Strategic Planning Retreat"

**Proposals must include (preferably in the order below):**

- a) Brief evidence of the firm's qualifications to provide the above services;
- b) A proposed scope of work and timeline;
- c) Proposed fee structure;
- d) Describe your billing rates and procedures for technical questions that may come up during the year, or whether these occasional services are covered in the proposed fee structure;
- e) And, references and contact information from at least 3 comparable nonprofit clients.

**Submission:** Please submit final proposal to Sarah Dryfoos by email on or before the deadline listed on page 1 ([sdryfoos@orpca.org](mailto:sdryfoos@orpca.org)). Only proposals submitted by email will be accepted. Email subject title should list "Final Proposal - RFP: Strategic Planning Retreat for OPCA"

### PROPOSAL EVALUATION AND CONTRACT AWARD

The Senior Leadership Team will review all proposals and make selections no later than July 15th, 2019. Work expected to begin immediately after selection.

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling \$1,491,396 with 48 percentage financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit [HRSA.gov](http://HRSA.gov).