

CONGREGATION KOL SHOFAR REQUEST FOR PROPOSAL (RFP)

About Congregation Kol Shofar www.kolshofar.org

Congregation Kol Shofar was founded in 1964 with only 15 families. Today, Kol Shofar is a dynamic and thriving faith-based community of nearly 500 member families from all over Marin County. It is the only synagogue affiliated with the Conservative Jewish movement in Marin County. Led by two Rabbis, an Executive Director and a Board of Directors, and with an average operating budget of \$1.7 million, congregational life centers on numerous religious, spiritual, prayer, educational, cultural and social experiences. Committees of volunteer congregants work with the staff to implement a variety of services, events, and religious programs. Jewish education is offered for children and youth at our preschool (established in collaboration with the Osher Marin Jewish Community Center), at Beit Binah, our school for kindergarten through seventh grade, serving about one hundred and forty children and at Tichon which serves sixty eighth grade and high school students. Adult education programs occur weekly with a focus on topics such as Kabbalah, Jewish religious practices, Jewish philosophy, Israel and so on. Cultural and social programs are also offered for the entire community, some developed around Jewish holy days and others for the purpose of community building. Our two Rabbis provide prayer and spiritual leadership, education, and pastoral counseling to members and lead services every Saturday, Tuesday and Thursday mornings. They officiate at lifecycle events, such as brit milah, bar/bat mitzvahs, weddings, and funerals.

We participate with other faith-based organizations in tikkun olam such as in the weekly Coalition Lunch offered to the homeless and we are active members in the partnership with the Marin Organizing Committee. Our Rabbis provide leadership in numerous moral, ethical, spiritual and social justice issues in the County.

Over the past few years, we have been faced with extraordinary challenges and done some extraordinary things. We managed to raise over \$13 million towards the renovation of our synagogue building. This project is currently underway, and scheduled for completion in the summer of 2010. To complete the project we will borrow additional capital and raise additional funds. We faced and overcame significant political and legal challenges over our building project and broke ground in April, 2009.

As a synagogue, we have the unique ability to enable Jews of diverse backgrounds to forge intellectual, psychological, spiritual, religious and emotional connections with the Jewish community. But we are living in a rapidly changing world – including a changing Jewish world. Here in Marin County, we are faced with contextual challenges of serving an extremely diverse constituency. And, while diversity leads to a unique richness, it also brings with it members who have different levels of learning, participation, engagement in Jewish life and conflicting points of view on some crucial issues. With all this in mind, coupled with the fact that during the renovation project we are operating as a congregation without a synagogue building, we have recognized the need and opportunity for a strategic planning process whereby we can clarify our vision and mission and plan for our future, as a sacred community, prior to entering our renovated synagogue in the Fall of 2010. While our Board of Directors, Rabbis, and some congregants have been working on building stronger personal connections amongst congregants,

through a process of sharing our stories called Panim el Panim (face to face), we find that we need to hone our Vision and have a clear mandate of what we stand for, a clear Strategic Plan, and a living realistic Action Work Plan.

About this RFP

This RFP consists of two sections. The first is **Section 1 Qualifications** which is aimed at learning about your consulting work and experience. A set of minimum qualifications are provided to provide a baseline for acceptability. The second is **Section II Project Proposal** which is aimed at learning how you would go about implementing the strategic planning process at Congregation Kol Shofar within the fiscal parameters of approximately \$30,000 that we have available for this project. **Deliverables** for this project will include:

- ∞ An Environmental Scan including a strong stakeholder process to assess the diversity of needs, priorities, and perspectives **and** key informant interviews both within and outside of Congregation Kol Shofar.
- ∞ A Vision and Mission Statement
- ∞ A Strategic Plan
- ∞ An Action Plan

SECTION 1: QUALIFICATIONS

DEMONSTRATION OF EXPERIENCE IN STRATEGIC PLANNING

This section provides you with an opportunity to explain your qualifications to lead and guide the Strategic Planning process for Congregation Kol Shofar.

Minimum Qualifications

PLEASE NOTE: Congregation Kol Shofar will not accept applications from staff, members, or immediate past members of the congregation.

Qualified candidates must:

- ∞ Have successfully completed at least two (2) strategic planning processes within the past five years
- ∞ Display a knowledge and understanding of and preferably experience with faith-based organizations
- ∞ Display a knowledge and understanding of the Jewish community and Jewish religious tradition and culture
- ∞ Display a knowledge of and demonstrated experience in strategic planning processes
- ∞ Demonstrate ability to work with diverse groups of stakeholders and have experience with stakeholder processes
- ∞ Demonstrate an ability to elicit meaningful information from stakeholders
- ∞ Demonstrate ability to work collaboratively
- ∞ Demonstrate professionalism

Qualifications Narrative

Please provide concise narrative responses to the following questions. Your responses should help the reviewers better understand what you offer.

(a) Consulting Work History and Structure

Briefly describe your consulting work experience, including history, number of years in business, your ownership structure, and if you are a firm, your organizational structure, name(s) of principals, staff size and composition.

(b) Depth of Experience and Familiarity

Briefly describe your experience and qualifications in strategic planning and organizational change. Include any information that may be of value to Congregation Kol Shofar in evaluating your qualifications for conducting this strategic planning process. Include your knowledge, experience and expertise vis-à-vis:

- ∞ Working with faith-based or nonprofit organizations, communities, or neighborhoods on strategic planning and organizational change.
- ∞ Implementing planning processes involving diverse stakeholders.
- ∞ Facilitating meetings and/or processes related to controversial issues

(c) Approach

Describe your approach to services and activities. At minimum, include the following information:

- ∞ What makes your approach to providing the services different or more effective than others providing the same services?
- ∞ What can you do to ensure a successful engagement with and successful outcomes for the Congregation?
- ∞ Describe any other asset, experience, methodology, data system or technology that provides you with a competitive advantage.

(d) Client List

Attach or insert a client list that illustrates the breadth and depth of your experience in organizational consulting services.

(e) Prior Projects Description

Provide information on at least **two (2) successfully completed projects** that best demonstrate your qualifications and experience. Projects should be no more than five years old.

Contacts for each project are required, and **will** serve as references for you. You should ensure that client contact information listed in the response is up-to-date and should notify clients that Congregation Kol Shofar may be contacting them. Use the format below for this section of your narrative.

Prior Projects Description:**Client Name:****Sector:** *(Public, non-profit, faith-based, other)***Client Contact Name and Title:****Client Contact Phone :****Client Contact E-mail :****Timeline:** *Length of project beginning to end (Month Year-Month Year)***Consultant Lead(s):****Number of hours/days:****Description of Project.** Within the bounds of confidentiality, please describe the project, how you approached the strategic planning process, barriers encountered, and ultimate outcomes.**SECTION II: SCOPE OF WORK PROPOSAL (RFP)***PROPOSAL FOR IMPLEMENTING A STRATEGIC PLANNING PROCESS***Project Scope and Proposal Narrative**

The consultant will work with a Strategic Planning Steering Committee consisting of the Rabbis, the Executive Director, select members of the Board of Directors, and members of the congregation or staff representing different constituencies and the congregation at large. The purpose of this Strategic Planning Steering Committee is to provide a forum for discussion, feedback, and support to the consultant and the overall process, such as identifying constituencies and key informants, assisting with information about synagogue activities and events, and assisting with information dissemination and logistics.

Please provide a narrative addressing how you would go about implementing the strategic planning process, including the following components.

a) Project plan

Provide a narrative of your work plan. Please include for Functions 1- 4 below the following:

1. Outline the **processes and methods** you would use to implement the Work.
2. Identify **challenges** you anticipate and how you would address them.
3. Define your **expectations** for the Congregation Kol Shofar Strategic Planning Steering Committee. What will you need from Congregation Kol Shofar staff and Board of Directors to ensure this process is successful, particularly in terms of collaboration, planning, and information?
4. A proposed **timeline**.

Function #1: Environmental Scan:

- a) Outline your approach and methodology for conducting an Environmental Scan that includes:
- b) What sort of information or data would you collect?

c) How would you document the process and what would be the final deliverable?

Function #2: Mission and Vision:

a) Describe how you would work with the Congregation Kol Shofar to develop Mission and Vision Statements

b) How would you document the process and what would be the final deliverable?

Function #3: Strategic Plan:

a) Describe how you propose to develop the Strategic Plan for Congregation Kol Shofar.

b) How would you document the process and what would be the final deliverable?

Function # 4: Action Plan:

a) How would you turn the Strategic Plan into an actionable living Work Plan for the next three years? How would you recommend measuring success as the plans are implemented?

b) How would you document the process and what would be the final deliverable?

c) Who will be working on this project? Please provide a brief biography(ies) to this application. If there is a team approach, please describe how you would work together, what skills each of you bring to the process and what roles each will play.

b) Project Budget-maximum \$30,000

Please provide a budget and budget narrative. Identify your assumptions and calculations for various activities. The budget should be itemized and comprehensive and presented in a spread sheet. Total funds available are \$30,000.

FORMS

Please complete the Face Sheet forms provided and attach them to the front of your RFP response as instructed on the form. These forms include the Applicant's indentifying details and contact information, the list of staff who will work on this Project, and a list of at least three Client References whom Congregation Kol Shofar may contact.

SCORING OF PROPOSALS

The following scoring proportions will be considered, although not exclusively, in determining which consultant is hired.

1. References (20 points)
2. Cost (15 points)
3. Responses to Section I (30 points)
4. Responses to Section II (35 points)

A selection panel will be convened of Congregation Kol Shofar Board Members, staff, and the Strategic Planning Steering Committee. Following the Proposal Review process, up to six of the

highest scoring applicants will be invited to interviews. The interviews will be rated separately from the points awarded during the Proposal Review process. The applicant's lead staff members that will be assigned to the project should be present for the interview, as well as the lead staff of subcontracted partner(s), if any.

TIMELINE AND PROCESS

09/15/09	RFP Distributed
10/30/09	Applications due
11/1/09-11/05/09	Applications Reviewed and Selection for Interviews <i>Top 3-6 ranked applicants will be invited for an interview</i>
11/09/09	Applicants notified of selection for interview or not
11/09/09-11/14/09	Selected Applicant Interviews and Sample Products Submission <i>Applicants selected for the interview will be asked to submit two sample products that demonstrate their experience providing the deliverables. Please redact confidential or proprietary information as appropriate.</i>
11/30/09	Selected applicant announced
12/10/09	Contract / letter of agreement finalized

CONDITIONS AND DISCLAIMERS

While applicants responding to this RFP will receive careful consideration, their response does not in any way guarantee they will be selected to work on Congregation Kol Shofar's Strategic Planning Process. Issuance of the RFP does not obligate Congregation Kol Shofar to award a contract, nor is Congregation Kol Shofar liable for any costs incurred by the applicant in the preparation and submission of proposals in response to this RFP. Congregation Kol Shofar retains the right to award all or parts of this contract to one or several applicants, to not select any applicants, and/or to re-solicit proposals.

The act of submitting a proposal is a declaration that the proposer has read the RFP and understands all the requirements and conditions. Proposals will not be accepted after the date and time stated in the cover letter and timeline. Incomplete proposal or proposals that do not conform to the requirements specified herein will not be considered.

Conflict of Interest:

In the sole judgment of Congregation Kol Shofar, any and all proposals are subject to disqualification on the basis of a conflict of interest. Congregation Kol Shofar may not contract with a consultant applicant if the applicant is an employee or congregant, or any immediate family member of the preceding, of Congregation Kol Shofar. Congregation Kol Shofar, at its

sole option, may disqualify any proposal on the basis of such a conflict of interest. If you are a firm, **please identify any person associated with the firm that has a potential conflict of interest.**

REQUIREMENTS

A. Insurance

The selected contractor will be required to maintain automobile and general liability insurance.

B. Worker's Compensation Insurance

A selected contractor who employs any person shall maintain workers' compensation insurance in accordance with state requirements. Sole proprietors with no employees are not required to carry Worker's Compensation Insurance.

FACE SHEET FORM Applicant Information

Please place this as the top pages of your application

1. *Applicant(s):*

Applicant's Name

Applicant's Office
Address

Applicant's Partner(s)
Name(s) if any

Applicant's Partner(s)
Address(es)

2. *Contact information*

Clearly identify the person that will serve as the overall RFP contact.

Name

Title

Email

Phone

Fax

Address

3. In the following tables please list the staff who will provide the services described in this RFP. Please attach their resumes to the application. Make additional copies of this form if necessary.

Staff #1

<p>Name, Title</p> <p>Proposed Project Role and Responsibilities</p> <p>Experience working with such Projects</p>
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Staff #2

<p>Name, Title</p> <p>Proposed Project Role and Responsibilities</p> <p>Experience working with such Projects</p>
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Staff #3

<p>Name, Title</p>

<p>Proposed Project Role and Responsibilities</p> <p>Experience working with such Projects</p>

Staff #4

<p>Name, Title</p> <p>Proposed Project Role and Responsibilities</p> <p>Experience working with such Projects</p>
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See next page for References Form

CLIENT REFERENCES

In the following tables, please provide a minimum of three client references. Provide the designated person's name, title, organization, address, telephone number, and the project(s) that were completed under that client's direction. **Please notify your client references that Congregation Kol Shofar may be contacting them.** Congregation Kol Shofar will not inform you as to when references will be contacted. Please note that it is acceptable for client references to be members of Congregation Kol Shofar.

Reference # 1**Reference Name and Title:****Organization and Address:****Reference's e-Mail Address:****Reference's Telephone Phone number(s):****Projects Completed:*****Reference # 2*****Reference Name and Title:****Organization and Address:****Reference's e-Mail Address:****Reference's Telephone Phone number(s):****Projects Completed:*****Reference # 3***

Reference Name and Title:

Organization and Address:

Reference's e-Mail Address:

Reference's Telephone Phone number(s):

Projects Completed:

Reference # 4

Reference Name and Title:

Organization and Address:

Reference's e-Mail Address:

Reference's Telephone Phone number(s):

Projects Completed: