

Request for Proposals



Subject: Organizational Planning and Development (Strategic Planning)

Due: June 6, 2025 at 3:00 p.m. Eastern Standard Time

RFP#: 2025-01

Submit to: Dr. Tonia Pace

118 Stover Drive

Delaware, Ohio 43015

tpace@helplinedelmor.org

**Helpline of Delaware & Morrow Counties
Request for Proposals for
Organizational Planning and Development/
Strategic Planning Consultant**

Scheduled Timeline

Action	Completion Date
Issue RFP	April 28, 2025
Deadline for Questions	May 5, 2025 by 8:00 a.m.
Deadline for Submitting Proposals	June 6, 2025 by 3:00 p.m.
Evaluation Committee Review	June 26, 2025
Select Proposals for Presentation	July 10, 2025
Reference Checks	July 10, 2025
Presentations	TBD
Final Ranking and Selection	July 31, 2025
Contract Agreement and Negotiation	August 5, 2025
Board of Directors Contract Approval	August 19, 2025

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Section I. Introductory Material

1.1 Statement of Purpose

HelpLine of Delaware and Morrow Counties, Inc. (Helpline) is accepting Proposals for Organizational Planning and Development from experienced and qualified entities to lead its Organizational Planning, Visioning and Development processes.

The intent of the process is to provide a consensus regarding the priorities and vision for HelpLine over the next fifteen years which will include a 5-year Strategic Plan.

The purpose and goal of this RFP is to secure an experienced and qualified individual or firm to guide the organization in the development of a strategic plan that adheres to its vision and mission while directing HelpLine in the best ways to allocate its human capital and financial resources.

1.2 Contract Term

The contract term for the Organizational Planning and Development with Strategic Planning is for one (1) year. The HelpLine Board of Directors and its Administrative Team have the sole option of extending the contract.

1.3 Background Information and History

HelpLine of Delaware and Morrow Counties, Inc. (HelpLine) is a nonprofit social services agency with more than 50 years of experience providing crisis support, prevention education and training, information and referral services, and volunteer opportunities to individuals and families across North Central Ohio. Founded in 1970 by a group of visionary women, HelpLine began as a grassroots effort to support single, pregnant women in crisis.

Over the decades, HelpLine has grown into a multi-county, multi-service agency and now serves as the region's only 24/7 comprehensive crisis line and information and referral provider. Originally operating under the name Help Anonymous, the organization has evolved significantly. Strategic mergers with Ohio Wesleyan University's "The Listening Post" in 1974 and Morrow County's Hopeline in 1996 expanded HelpLine's reach and formalized its presence as HelpLine of Delaware and Morrow Counties, Inc. Today, HelpLine employs more than 45 staff across three offices in Delaware, Morrow, and Crawford counties, supported by a robust network of volunteers. We serve a diverse and growing population across eight counties and respond to an average of 19,000 requests annually for crisis support and community resources. Our programs are grounded in best practices, strong community partnerships, and a commitment to equity and innovation. In 2000, HelpLine became the first agency in Ohio to join the 1.800.SUICIDE talk network. Two years later, we were the first in the state to launch the 211 information and referral line, connecting residents to vital health and human services. In 2023, HelpLine began answering 988 suicide and crisis lifeline calls, becoming one of just four agencies in Ohio to offer a blended information and referral and crisis prevention hotline. Additional programs include our trauma-

informed sexual assault services through the Sexual Assault Response Network (SARN) and evidence-based suicide and violence prevention programming in schools and communities. Our award-winning Connections Volunteer Center helps bridge the gap between passionate volunteers and pressing community needs, with a special emphasis on engaging adults aged 55 and older. One example is the Sages & Seekers program, an innovative eight-week intergenerational experience designed to foster empathy and reduce ageism through in-person conversations between older adults and high school students. Throughout our history, HelpLine has remained at the forefront of innovation—integrating technology like text-based crisis support (Text 898211), and continually expanding programs in response to community needs. HelpLine continues to serve as the go-to resource for individuals in crisis and for those working to create lasting change through education, advocacy, and volunteerism. HelpLine is a provider agency of the Delaware-Morrow Mental Health & Recovery Services Board, a partner of the United Ways of Delaware, Morrow, and Union counties, and is partially funded by SourcePoint, the Ohio Attorney General’s Crime Victims Services Office, the Ohio Office of Criminal Justice Services, the Ohio Department of Health, and private donations. HelpLine is certified by the Ohio Department of Mental Health and Addiction Services, the American Association of Suicidology, and is accredited by Inform USA.

Section 2. Scope of Services

2.1 Technical and Operational Requirements

HelpLine is seeking a qualified individual or firm to lead its organizational development and strategic planning processes. The process should be inclusive and encourage participation from all segments of the communities served by HelpLine. Proposers must have prior experience with similar projects and should include in their submission a detailed outline of relevant experience and qualifications. At least two examples of previous work products should be included. The selected proposer will be expected to present a comprehensive work plan that incorporates community engagement strategies such as resident participation, focus groups, workshops, and online surveys to achieve the identified deliverables.

The intended outcome is to build consensus around a long-term organizational vision for the next fifteen (15) years and to develop a comprehensive five-year strategic plan. This vision should address financial sustainability, with particular attention to compensation and benefits. It should also consider the expansion and integration of programs and services based on community needs, interagency collaboration, and available funding. Broad stakeholder involvement from across the community is essential. The resulting strategic plan should guide HelpLine in effectively allocating resources to fulfill its mission, and include clearly defined benchmarks to measure progress toward its goals.

HelpLine requires that the planning process be conducted transparently, with active participation from employees, board members, stakeholders, community members, and business leaders. It is expected that the proposer will utilize tools such as surveys, workshops, focus groups, individual interviews, and data collection to gather the information necessary to develop a meaningful and actionable plan.

2.2 Deliverables

The organizational, vision and strategic planning processes and resulting documents should, at a minimum, address the following key areas:

- A. Guide stakeholders in reaching consensus on the core elements necessary for the continued growth, development, and sustainability of HelpLine.
- B. Evaluate the current organizational structure and services to determine how best to allocate resources while maintaining community and consumer confidence in HelpLine's effectiveness.
- C. Generate innovative ideas for programs, services, and supports to ensure HelpLine remains well-positioned to meet the evolving crisis-related needs of the community.
- D. Translate the goals of the visioning process into realistic and achievable targets. Recommend actionable steps for implementing, monitoring, updating, and communicating the vision.
- E. Review, analyze, and recommend a salary and compensation structure that supports organizational needs, reflects the cost of living in Delaware County, and aligns with available financial resources and long-term sustainability.

2.3 Technical Proposal General Requirements

The purpose of the proposal is to demonstrate qualifications, capacity and competency of the firm or individual desiring to undertake the Organizational, Strategic Planning & Visioning services for HelpLine in accordance with the guidelines detailed in this proposal. Proposals will be evaluated based on what is determined to be in the best interest of HelpLine.

Evaluation criteria may include the proposer's experience and expertise in serving nonprofit organizations, the clarity and creativity of the proposed approach, recommendations from previous clients, and the proposer's awareness and understanding of the communities served by HelpLine—particularly in Central Ohio, and more broadly, the state of Ohio. While cost will be considered, it will not be the sole determining factor in the evaluation process. The proposed evaluation is the first step in the process to determine a short list of individuals and or firms. The selection will prioritize the proposal that offers the best overall combination of experience, qualifications, cost, and approach—not necessarily the lowest bid.

2.4 Qualifications

This section of the proposal should establish the ability of Proposer to satisfactorily perform the required work. Factors include experience in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; work load; record of meeting schedules on similar projects; and supportive client references.

2.4. A. Proposer Should:

1. Provide an overview of the Proposer's organization, including size, qualifications, and years in business; form of the organization (corporation, partnership, sole proprietorship); number, size and location of office(s); and number of employees.

2. Provide a general description of the firm's financial condition and identify any conditions (e.g., bankruptcy, pending litigation, planned office closures, impending merger) that may impede Proposer's ability to complete the project.
3. Provide a minimum of three (3) references for the projects cited as related experience and furnish the project, name, title, address, telephone number and email of the person(s) at the client organization who is most knowledgeable about the work performed. You may also supply references from other work not cited in this section as related experience.
4. Describe experience in performing work of a similar nature to that solicited in the RFP and highlight the participation in such work by the key personnel proposed for assignment to this project.

2.5. Management and Staff Experience

This section should establish the method which will be used by the Proposer to manage the Scope of Work and identify key personnel assigned to the Scope of Work.

2.5 A. Proposer should:

1. Describe the Proposer's experience in providing services within the nonprofit sector, with particular attention to nonprofit organizations serving communities similar to those served by HelpLine.
2. Provide education, experience, and applicable professional credentials of project staff. Provide resumes of Project Manager and other key personnel.
3. Include a statement that key personnel will be available for the duration of the project acknowledging that no person determined to be "key" to the project shall be removed or replaced without the prior written agreement with HelpLine of Delaware and Morrow Counties.
4. Include a project organization chart which clearly delineates communication/reporting relationships among the project staff.

2.6 Understanding of Scope of Services and Methodology

Proposer shall provide a narrative which addresses the Scope of Work and details an understanding of HelpLine's needs and requirements.

2.6 A. Proposer should:

1. Describe the approach to completing the tasks specified in the Scope of Services.

2. Include an implementation schedule with a final report delivery date and note key project milestones and timelines for deliverables. Make sure to include and identify any assumptions used in developing the schedule.
3. Proposer may also propose procedural or technical enhancements/innovations to the Scope of Services which do not materially deviate from the objectives or scope of services.

2.7 Fee Proposal

The 'Fee Proposal' form included as Addendum A with the RFP must be completed in its entirety. Within the fee proposal, proposers shall provide a total cost of the work required by HelpLine. The total cost is to be quoted on a fully burdened basis, to include all indirect, direct costs as well as profit.

Section 3-Procurement Instructions

3.1 Questions

Questions seeking clarification of the proposal requirements or specifications should be submitted via email to Dr. Tonia Pace at tpace@helplinedelmor.org no later than 8 a.m. on May 5, 2025. Responses to all questions will be compiled into an Addendum and posted on the HelpLine website by May 12, 2025. It is the responsibility of the Proposer to review these responses prior to submitting a proposal. Proposers are also responsible for determining whether any addenda have been issued, obtaining all such addenda, and incorporating any necessary updates into their submitted proposal.

Written questions received after May 5, 2025, 8:00 a.m. may not be answered.

3.2 Submission of Proposal

1. Proposer shall submit the full proposal on or before June 6, 2025 at 3:00 p.m. Proposals must be sent via email to Dr. Tonia Pace at tpace@helplinedelmor.org. Proposals must be submitted in Adobe PDF format. All pages must be numbered with the individual or firm's name in the header.
2. Any proposal submitted after the specified date and time will not be reviewed. The Proposer is solely responsible for ensuring the proposal is received on or before the deadline of June 6, 2025 at 3:00 p.m.
3. A page preceding the full proposal should contain the following:

Proposal for: Strategic Planning and Visioning Consultant
RFP Number: 2025-01
To be Reviewed: June 26, 2025

4. All proposals that are not submitted in the required format or missing required forms will be subject to rejection. The complete RFP and applicable forms are available on the HelpLine website. Proposals must be signed electronically in Adobe PDF with a date and time seal. It is agreed upon by the Proposer that the signing of the proposal via Adobe and delivery of the Proposal via email represents the Proposer's acceptance of the terms and conditions of the specifications.
5. All proposals will receive an email verifying the date, time and individual in receipt of their proposal.
6. **Incurred Expenses**-HelpLine is not responsible for any expenses the Proposer may incur as a result of preparing and submitting proposals for this Request for Proposal (2025-01).
7. **Presentations and/or Interviews**-HelpLine reserves the right to conduct interviews and/or require proposers to make oral, in-person or virtual presentations as part of the proposal evaluation process.
8. **Request for Modification**-HelpLine reserves the right to request the Proposer modify their proposal to fully meet the needs of HelpLine.
9. **Request for Additional Information**- HelpLine reserves the right to make investigations of the qualifications of the Proposer as it deems appropriate, including but not limited to a background investigation. HelpLine also reserves the right to make such investigations, as it may deem necessary to establish the competency and financial ability of any Proposer to perform the work.
10. **Acceptance, Rejection, or Modification to Proposals** – HelpLine reserves the right to reject any or all proposals, in whole or in part, with or without cause, to waive any informalities and technicalities, and to award the contract on such coverage and terms it deems will best serve the interest of the HelpLine.
11. **Proposals Binding**-All proposals submitted shall be binding for one hundred twenty (120) calendar days following the date of review.
12. **Proposals will not be returned**-All proposals received will become the property of HelpLine of Delaware and Morrow Counties, Inc. The proposals submitted in response to RFP 2025-01 will not be returned to the Proposer. In the event of contract award, all documentation produced as part of the contract will become exclusively the property of HelpLine of Delaware and Morrow Counties, Inc.
13. **Proposal Certification**-By submitting a proposal, the Proposer certifies they have fully read and understand the proposal method, meet the requirements and has full knowledge of the scope, nature and quality of work to be performed.
14. In order to ensure uniformity in the review process and to obtain the maximum degree of comparability, it is required that proposals be organized in the manner specified

in Section 3.3. An electronic version of this RFP may be obtained from the HelpLine website: www.helplinedelmor.org.

15. **Communications**-Communications initiated by the Proposer to anyone other than HelpLine's designated point of contact may be grounds for disqualifying the offending firm or individual from consideration for the award of the proposal and/or any future proposals.

3.3 Contents and Format

1. 'Blank' Page-Must be blank EXCEPT for the following:

Proposal for: Strategic Planning and Visioning Consultant

RFP Number: 2025-01

To be Reviewed: June 26, 2025

2. Table of Contents-Please ensure clear identification of the material by section and by page number

3. Letter of Transmittal

1. Limit 1-2 pages
2. Detail the Proposer's understanding of the work to be done and your commitment to performing the work.
3. Include names of authorized representatives of the proposer. Please include their title and all pertinent contact information (email address, phone number, physical address).
4. Provide a signature of the Executive Officer attesting to and certifying the contents of the proposal for HelpLine.

4. General Information

1. Name of Business
2. Mailing Address and Phone Number
3. Proposal Lead Email address
4. Normal business hours

3.4 Organizational Development and Strategic Planning Approach

1. Explain in detail your proposal and how it plans to fulfill the requirements of the Scope of Services.
2. Ensure all requirements detailed in the RFP and the Scope of Services is fully addressed.

3.5 Qualifications and Experience

1. Specify the number of years the firm or individual has been in business.
2. List and explain the Proposer's qualifications to perform the services detailed in this RFP.
3. Provide a minimum of **three (3) references** with valid contact information including project, name, title, address, telephone number and email address.

3.6 Cost and Payment Terms

1. Provide a proposal budget that details itemized cost of services.
2. Ability to provide a W-9 upon request.
3. Indicate whether the Proposer is willing to invoice HelpLine for services rendered and a timeline by which invoices will be submitted.

Section 4-Evaluation and Review Process

HelpLine will conduct a comprehensive and impartial review and evaluation of all Proposals meeting the requirements of this solicitation. Please note that HelpLine, at its sole discretion, reserves the right at any time during the process to reject any and all Proposals that are not in the best interest of the HelpLine. Only timely submitted Proposals shall be reviewed and evaluated by staff to determine if they comply with the required forms, documents and submission requirements listed in the RFP.

1. HelpLine reserves the right to require live or virtual presentations from any or all of the firms/individuals that submitted proposals.
2. The Evaluation Committee will rank all proposals according to the criteria listed herein.
3. Contract negotiations will be conducted with the firm or individual with the highest-ranking proposal score. The negotiated agreement will be submitted to the HelpLine Board of Directors for a final approval vote.
4. HelpLine reserves the right to reject any and all proposals and to waive minor defects or irregularities. HelpLine further reserves the right to seek new proposals when such a procedure is reasonably in the best interest of HelpLine to do so.
5. If negotiations with the highest ranked Proposer fail, then HelpLine will begin negotiations with the second-ranked firm, and so on.

1	Evaluation Criteria	Points	Proposer Company	
2	Submission of all required forms, documents and signatures	Pass/Fail		
3	Itemized Budget Submission Form	Pass/Fail		
4	Experience and Qualifications (40%)	60		
5	Proposal Approach (50%)	75		
6	Cost (10%)	15		

Section 5-General Terms and Conditions

1. **Late Proposals:** Proposals received by HelpLine after the time specified for receipt will not be considered. The responsibility for prompt and timely submission of the proposal is solely the Proposers.
2. **Completeness:** All information required by for the RFP must be supplied and submitted to constitute a legitimate proposal.
3. **Execution of Agreement:** The successful Proposer shall, within thirty days (30), enter into negotiation and agreement with HelpLine for the proposed services. Failure to comply and meet the deadline and submittal of all required documents may be grounds for cancellation of the agreement.
4. **Nondisclosure of Information and Assignments Agreement:** By signing the Conflict of Interest statement, the successful Proposer commits to adhering to any and all conflict of interest laws and policies in effect at the time of the proposal submission and during the duration of the contracted service.

Addendum A**Fee Proposal**

Provide a total cost on a fully-burdened basis, incorporating direct labor costs, indirect costs, profit, travel expenses, and “not to exceed” amount for the work described in the scope of work. Strategic Planning and Visioning Services as listed in the Scope of Work.

Total Cost not to exceed \$ _____

On a separate sheet, please detail any additional resources, including in-kind contributions, that will support the proposed project. Also include a description of how project costs will be managed to ensure all work is completed within the negotiated budget.

By signing below, the undersigned certifies that they have the authority to bind the firm or company to the services outlined and the fees proposed.

Signature: _____

Printed Name: _____

Title: _____

Date Signed: _____

Individual or Company: _____

Email: _____

Addendum B

Nondisclosure of Information and Assignments Agreement

As a condition to my acceptance of the contractual agreement with HelpLine of Delaware and Morrow Counties, Inc., (HelpLine) having a primary place of business located at 118 Stover Drive, Suite B, Delaware, OH 43015 (hereinafter referenced as “HelpLine”).

Nondisclosure Agreement (NDA)/Terms and Conditions:

1. All creations, inventions, ideas, and discoveries, whether or not patentable, conceived or made by [individual or firms name] while in the employ of HelpLine or following termination of this contractual agreement, which relates to or constitutes the development and achievement of HelpLine’s requested deliverables in the format of an Organizational Planning, Visioning and Development Plan and Process. The intent and focus of the Organizational Planning, Visioning and Development Plan and Process is to provide a consensus of the priorities, vision and mission for HelpLine over the next fifteen (15) years which includes a specifically defined five (5) year Strategic Plan.
2. It is with full acknowledgement and acceptance that the terms and conditions of this contractual agreement for an Organizational Planning and Development with Strategic Planning is for one (1) year. It is also noted that the HelpLine Board of Directors and its Executive Administrative Team have the sole option of extending this contractual agreement. In addition, that both parties (HelpLine and [name individual or firm]) upon mutual agreement may terminate this contractual agreement prior to one (1) year.
3. I will hold in secret confidence,, and not divulge to any non-HelpLine personnel without first obtaining the express written authorization of HelpLine authorized representatives (e.g., Board of Directors or Executive Administrative Team), private and proprietary information, organizational secrets non-public accessible sensitive operational business information/data, and know-how of processes and confidential information/data of both HelpLine and all partner and customer consumer proprietary information/data, and development plans disclosed to HelpLine, which [individual or firms name], which may learn or comes into possession through or in the course of developing and implementing the Organizational Planning, Visioning and Development Plan and Process.

Nondisclosure of Information and Assignment Agreement

[Individual or Firm’s Representative Name]: _____

Title: _____

Date: _____

Company Name: _____

HelpLine Representative Name: _____

Title: _____

Date: _____

HR - RDS 4.23.25 (2)