# Strategic visioning and planning RFP

## Questions and Answers

### 2020-01-06

1. Is it possible for you to email a copy of the previous strategic plan that WestCOG was using so we can get a better idea of the nature of this project and changes that you'd like us to make?  
   *This would be the first such plan, so no.*
2. I believe there was a typo, as the RFP [gives dates in] 2019, and it's 2020.  
   *The dates have been corrected.*

## 2020-01-17

1. A pre-bid conference will be held. The RFP has been updated with details.

## 2020-01-28

1. What is the planning period for this plan? (How many years will the plan look out?)  
   *~~5-10 years.~~* ***The plan should look out five years. (2020-02-03)***
2. Please define the following terms: vision, mission, goal, and objective. Every organization defines these differently. I would like my treatment of these terms to be consistent with your understanding.  
   *These terms have not been explicitly defined. A respondent may assume a dictionary definition or define them in a response to the RFP if desired.* ***Locally-specific definition of these terms may be a component of the project if a respondent deems it appropriate. (2020-02-03)***
3. Is an organization chart available for the WestCOG Director and staff? Understanding the structure won’t change, I would like to understand what functions the existing staff addresses today.  
   *A staff directory is available at* [*https://westcog.org/about/staff-directory/*](https://westcog.org/about/staff-directory/)*.*
4. How many concurrent projects is WestCOG able to manage today?  
   *The ability of WestCOG successfully to manage programs/projects depends on a range of factors, many of which may be at least partly exogenous to the agency. These include program/project duration and complexity, and political and economic dynamics.*
5. How does WestCOG measure cost efficiency today? Are there existing cost standards that you measure against or do you simply check that WestCOG projects are less costly than towns working separately?  
   *As a grant-funded agency, cost efficiency criteria are generally set by grantors and are specific to each grant opportunity or funding program. WestCOG’s grant applications are designed to meet such criteria (e.g., benefit-cost ratios).*

## 2020-01-29

1. Is WestCOG open to out of State vendors?  
   *Yes.*
2. Is there a budget or budget range in mind for this project?  
   *There is not a set amount for this project; however, the project must fit within WestCOG’s Regional Services Grant (which other projects draw on as well).*
3. Is there a designated timeframe for this initiative?  
   *WestCOG anticipates the project concluding no later than one year after contract execution, although a shorter timeframe (e.g., six ~~to nine months~~) would be preferable.* ***(2020-02-03)***

## 2020-02-03

1. See edits to this answer in foregoing.
2. See edits on this answer in foregoing.
3. See edits to this answer in foregoing.
4. Is there target timeframe for completion of the strategic plan?  
   *See answer #11.*
5. Is there a target timeframe for implementation?  
   *Implementation of the plan is desired following its completion. The plan should identify parties responsible for its implementation; however, implementation of any plan developed pursuant to this RFP is separate from plan development and is not included in this RFP.*
6. The RFP states that “No assumptions should be made about funding levels for this project. (Amounts are to be determined.)” Can you provide any information on the timeframe for determining funding levels? *COG funding varies year-to-year. Funding availability will depend on the size of WestCOG’s Regional Services Grant (RSG) for state fiscal year 2021 as well as any unexpended resources in its 2020 RSG award. These figures are expected to become more precise in the coming months*
7. Is there a timeframe for periodically refreshing the strategic plan once it has been defined (e.g., annually, quarterly, etc.)?  
   *No. Such a recommendation and process for that could be included in the strategic plan.*
8. Do you have a list of stakeholders who are expected to be included in the strategic plan and/or an estimate for the number of interviews/focus groups required? What percentage of time are those stakeholders expected to participate in the project?  
   *The stakeholders are primarily the eighteen Chief Elected Officials (CEOs) of the region, who comprise WestCOG and whom WestCOG serves. Other parties, such as key municipal employees and other elected officials, may be invited to participate as the CEOs see fit, but are unlikely to constitute the bulk of the stakeholders involved. WestCOG is open to a range of suggestions for how best to involve stakeholders, whether interviews, focus groups, and/or other mechanisms. WestCOG has not determined a minimum or optimum number of interactions with stakeholders; however, the project should enable stakeholders to come a consensus about a vision and plan, which they, together with WestCOG staff, can and will carry out. In other words, the process can be as simple or ornate as desired, provided it fulfills the goals of the RFP.*
9. Has WestCOG determined a project duration or expected completion date for this work?  
   *See answer #11.*
10. What is the level of detail WestCOG anticipates is required for development of a comprehensive planning process and strategic plan within this assignment?  
    *A plan that is too high-level may leave too many questions to be answered; conversely, a plan that is too detailed may not represent an efficient use of resources and may become obsolete. Responses to this RFP may propose a level of detail; in all cases, the plan should be sufficiently detailed so that the COG can carry it out with the resources that it expects to have at its disposal. How the plan accounts for uncertainty may also be included in an RFP response.*
11. What is the level of detail for development of an implementation plan that WestCOG is looking for?  
    *The implementation plan should prioritize desiderata. Each desideratum should include a name, description, addressee/responsible party, quantification of resource needs (including whether such resources are existing, projected, or need to be acquired; and confidence intervals where there is uncertainty), identification of potential obstacles and roadblocks (e.g., critical paths), probability of success, methods to operationalize/track progress and indicators of success, and suggested next steps on how to proceed after completion. Factors be considered in prioritization may include, but are not necessarily limited to, all of these.*
12. What is the level of detail for financial recommendations that WestCOG is looking for?  
    *WestCOG’s finances should be appropriate to realize its vision and carry out its strategic plan. Should existing resources be inadequate to do so, the plan should include priorities that will stabilize, diversify, and expand WestCOG’s revenue streams so that they are adequate. The level of detail associated with financial recommendations should be consistent with the level of detail for the strategic plan, so that the plan may be implemented without the need for extensive additional revenue and cost estimation. (WestCOG understands that some desiderata, such as major capital projects or new services, may require more detail than a confidence interval; however, the project should include ranges that are specific enough to determine whether a desideratum is feasible and warrants prioritization.)*
13. What type of materials/background information will be provided by WestCOG, if any?  
    *WestCOG is able to provide data on existing, completed, and planned programs and projects; COG finances; and social, economic, and demographic data on the region. WestCOG can, within the limits of its knowledge, to speak to challenges and successes, at WestCOG, in other regions in Connecticut, in member municipalities, and in Connecticut as a whole. Case studies and models from comparable entities in the nonprofit sector and of regional governance in other jurisdictions (beyond Connecticut) likely fall outside of the ken of WestCOG and may entail research as part of the project, if such work is deemed appropriate to the project and is included in its scope.*
14. Is there an anticipated number of focus groups that WestCOG anticipates should be conducted?  
    *See answer #16.*
15. Is there a targeted number of stakeholder interviews that WestCOG would expect to be conducted?  
    *See answer #16.*