



Montgomery County Green Bank REQUEST FOR QUOTATION

Strategic Planning Consultant

RFQ Issue Date: June 10, 2021
Final Submission Date: June 25, 2021
Send to RFP@mcgreenbank.org

I. Summary

The Montgomery County Green Bank Corporation (the “Green Bank”) is issuing a Request For Quotation (“RFQ”) from experienced strategic planning professionals (“the Consultant”) to support development of a new 3-year strategic plan for the Montgomery County Green Bank. The engagement is to start in mid-July and last through spring 2022.

The Consultant will be key to revising the current strategic plan that ends in June 2022 and setting the aggressive course for the Green Bank for the next 3 years. The Consultant will be integral to this process working with the Green Bank Board, stakeholders, and staff to assess current progress, County needs and drivers, and define the goals and strategies for reaching significant growth and depth in the Green Bank’s mission. Important in this planning exercise will be to assure the Green Bank’s goals and strategies are equitable, inclusive and impactful.

The work of the Consultant will encompass interviews with Board members, staff, and key stakeholders, facilitating discussions with the Board and relevant Committees of the Board, iterating a plan, and supporting the Board in its deliberations to reach a decision on a final strategic plan. The Board will meet in late September, November, January, and April. The key Committee that will serve as the entity to drive deeper into the strategic plan development will meet in August, September, October, November, December, January, and March. It is expected that the majority of the development of the plan and framing of a nearly complete strategic plan will be completed by the January 2022 Board meeting with adoption at the April 2022 Board meeting.

The deliverable for this exercise will be an easily understandable, accessible, and concise strategic plan narrative of 5 to 10 pages with an accompanying PowerPoint presentation. Appendices in the presentation can include the backup and reference information used to develop or expand on the succinct narrative plan components or the PowerPoint presentation.

Interested parties are asked to send submissions by email to RFP@mcgreenbank.org by June 25, 2021.

Inquiries should be directed to RFP@mcgreenbank.org, or call 240-453-9000.

II. About Us

Designated as Montgomery County's Green Bank on August 2, 2016, the Green Bank is a publicly chartered, 501(c)3 nonprofit dedicated to accelerating affordable clean energy and energy efficiency investment in Montgomery County, MD. We partner with the private sector to build a more diverse, equitable, and inclusively prosperous, resilient, sustainable, and healthy community. Our work supports Montgomery County's goal to reduce its greenhouse gas emissions.

As the nation's first county-level green bank, the Green Bank uses public and private funds to drive investment in the Montgomery County clean energy market. The Green Bank's capitalization is presently about \$18 million.

III. SCOPE OF WORK

Consultant will provide the following services to support the Green Bank's strategic planning effort for its next three-year period. Consultant will serve as an active collaborative partner in working with the Board and staff to facilitate, organize, and structure the plan. Particular attention must be given to the role and approach of the Green Bank to be an effective player and partner in the equitable and inclusive education, distribution, and use of its products and services.

The scope of services includes:

- Review existing material related to the prior strategic plan, relevant collateral material, reports of the progress of the Green Bank, and efforts undertaken or underway to address equity and inclusion in its work.
- Limited market due diligence to understand the market landscape of the Green Bank and the network of Green Banks.
- Conduct interviews of Board members, staff, and key stakeholders prior to September 29 Board meeting to gain perspective on Green Bank efforts and future strategic priorities.
- Facilitate four Board and six to eight Committee meetings each being one-hour sessions with necessary presentations and documents to develop and advance the three-year strategic plan and the accompanying Action Plan for first year.
- Develop up to six iterations and a final version of the strategic plan for Board and Committee meetings.
- Deliverable shall be a concise and focused 5 to 10 page narrative and an accompanying slide presentation, including at a minimum the vision, drivers, objectives, transformative goals, strategies, and metrics for the three-year plan, and an Action Plan defining the key activities for Year 1 of the plan.

Key Milestones:

- Launch effort: Mid-July 2021
- First Board discussion: September 29, 2021 (Initial framing and key elements identification)
- Second Board Discussion: November 17, 2021 (First review of a plan)
- Third Board Discussion: January 26, 2021 (Near final draft of plan and first year action plan)
- Fourth Board Discussion: April 20, 2021 (Adoption of Plan)

IV. QUALIFICATIONS

- The Green Bank is seeking an accomplished strategic planning consultant with prior experience in guiding Board-level strategic planning exercises and working with all parties in a collaborative process.
- Work related to energy efficiency, renewable energy, or environmental sectors is preferred but not required.
- Work related to not-for-profit enterprises is preferred but not required.
- Work that incorporated reaching and connecting to underserved populations is strongly desired.
- Demonstrated work product that drives discussion, presents concise observations and strategies, and that focuses on outcomes.
- Demonstrated ability to stay on timetables and drive the process.

V. TERM OF ENGAGEMENT

Subject to satisfactory negotiation of terms, the initial term of this engagement is intended for July 2021 through April 2022, although the majority of the effort should conclude by January 2022. The Green Bank will reserve the right to terminate the contract with 30-days' notice.

All information provided to the Consultant, as well as all work completed by Consultant under this contract will be confidential (unless publicly disclosed by the Green Bank) and will be proprietary to the Green Bank, the property of the Green Bank, and may not be shared with any other party without the prior written consent of the Green Bank.

VI. FEES

The Consultant should propose a fee approach for undertaking the assignment that would align with the ability to achieve the major results and best manage the Green Bank's budget. Please note if you are offering a nonprofit discount to your normal fee structure.

Review will consider the competitiveness of the fee proposal.

VII. QUOTATION SUBMISSION INSTRUCTIONS

The deadline for all Final Submissions is June 25, 2021.

For a Final Submission, the Green Bank requires a written letter proposal of no more than 3 pages (not including resumes) to cover the following.

A. Proposed Services:

1. Explain the approach for conducting the proposed Scope of Work, the structure for the engagement, and deliverables the proposer would hope to achieve during this period.
2. Consultant's proposed fee approach. Consultant should indicate whether rates are standard or special nonprofit rates (and if the latter, how they differ from standard rates). Proposal must include the hourly rate of the consultant.

3. Consultant should state that Consultant has the capacity to do this work given Consultant's other commitments.

B. Summary of the Proposer's Qualifications:

1. Short one-paragraph summaries of three other strategic planning efforts of similar nature with nonprofit Boards.
2. Submission of at least one concise example. Material will be considered confidential. Consultant may redact the name of the party for which work was completed.
3. Consultant's resume or CV of the key individuals who will undertake the engagement. If this person was not part of the examples provided, please state why this person is being recommended.
4. Three references of prior work, including name of organization, contact name, phone number, and email address.
5. Any additional information proposer wishes to convey that illustrates proposer's understanding and knowledge of the subject matter of the Green Bank's work.

C. Submission Method -- Proposals should be sent by email to: RFP@mcgreenbank.org.

D. Right to Request Additional Information and Clarifications - The Green Bank reserves the right to request additional information or clarifications from proposers, or to allow for corrections of errors or omissions.

E. Right to Reject Proposals - The Green Bank reserves the right to reject any or all proposals submitted and solicit new proposals if necessary.

VIII. Evaluation of Proposals

The Green Bank will base its selection on several factors including:

- Clarity of the response to the engagement.
- Depth of experience in undertaking work of similar nature and for the areas of the Green Bank's priorities, including working with Boards and work product produced.
- Skills in collaborating with customers.
- Structure of fee proposal, competitiveness of fees, and any consideration of the Green Bank being a nonprofit 501(c)3 entity. Competitiveness with other proposals.

The Green Bank may include an interview of respondents as part of the evaluation and decision process.

Please direct any questions to RFP@mcgreenbank.org or by telephone at 240-453-9000.