

ARLINGTON PUBLIC SCHOOLS  
869 Massachusetts Avenue  
Arlington, Massachusetts, 02476

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Request for District Vision and Strategic Planning Facilitation Proposal  
RFP

## Overview

A number of factors have coincided to make now the right time to develop the District's Vision and Strategic Plan. The district has a new superintendent bringing fresh ideas and new perspectives to the District. The new Arlington High School building is proceeding as planned, which will bring a tremendous, new environment for student and community engagement, learning, and programming. The pandemic accelerated the use of technology for learning in schools and at home. This pandemic, coupled with the shift in the delivery of instruction, has increased the need and revealed the role of schools in proactively addressing students' and families' social, emotional, mental, and physical health. Healthy students and families are essential to realizing student learning outcomes across the District. In addition, local and national events have brought renewed attention to diversity, equity, and inclusion, and awareness of the competencies that students will need to navigate ongoing societal and environmental changes (e.g., climate change, workforce automation, challenges to existing power structures).

These challenges and opportunities necessitate a community dialogue on:

- our community's values and priorities for our schools;
- an understanding of the future for which we are preparing our learners;
- the formulation of initiatives and plans that collectively will help us reach a shared vision, and
- the process that both allows us to adjust as necessary and ensures that we successfully reach our milestones.

## Scope of Work

District stakeholders (including educators, parents, students, and community members, and leaders) will engage in a facilitated process to develop an updated vision for the District and a strategic plan to guide the District's major initiative. Engagement and pre-planning will be in February 2022, Initial Planning will start in March 2022, Visioning will begin in April 2022, Strategic Planning in July 2022, and plan implementation will begin in January 2023. Most of the meetings are intended to be in person.

Note: Contracted deliverables are capitalized and bolded.

### **The district's objectives include:**

This visioning and strategic planning process are designed to deliver four major outputs for the district: the vision, a strategic plan, a governance structure, and a change management plan.

### *Visioning*

Starting March 2022, the Consultant will facilitate an iterative and collaborative process to articulate a vision for the District. The phase of the work will conclude by early summer 2022 with the delivery of the Vision for the District. The **Vision** will contain five specific pieces:

1. A Vision Statement that clearly and succinctly articulates the stakeholders' collective Vision for the District
2. A Statement of Shared Beliefs and Understandings about learning
3. A set of 4-5 Key District Priorities that will allow the District to work toward the Vision
4. A descriptive statement of Success Criteria for all APS students and the District as a whole
5. Milestones and Metrics to measure progress toward realizing the District's education Vision and key priorities

### *Strategic Plan*

The second major objective is the **Strategic Plan** which will serve as the roadmap to realize and operationalize the District's Vision over a five-year period. The Strategic Plan will explain *what* and *how* District leaders and stakeholders collaborate to achieve the Vision.

The Strategic Plan will include up to ten (10) key initiatives, nested beneath the overarching District Priorities. The key initiatives contained in the Strategic Plan will each include:

- A charter describing the initiative
- Major initiative deliverables
- Team resources
- Budget
- Timeline
- Initiative-level Activities in a project plan
- Initiative-level Metrics and Milestones

The initiatives may include building and developing new organizational capabilities for the District, changes to ways of working and culture, or other significant and multi-year efforts to address district priorities. Whenever possible, the initiatives will both align and leverage good work already underway in the District.

### *Change Management Plan*

The vision and strategic planning process and its outcomes require communication, education, training, and an ongoing improvement orientation to help achieve the vision. The vision and strategic planning process will create a **Change Management Plan** to accelerate the realization of the Vision and Strategic Plan including:

- A case for change that provides a compelling story and a rationale for why change is necessary and why it's necessary now
- Stakeholder maps and strategies for engagement
- Plans for communications, education, and training activities
- Specific communications, education, and training materials
- Plans for the governance cycles of feedback, data, and improvement

### *Governance*

The realization of the District's Vision over the five-year Strategic Plan will require shared accountability between the District and its stakeholders, and possibly require changes and additions to adjust to changing circumstances. The visioning and strategic planning process will include the development of governance for the Vision and Strategic Plan. At a minimum, the governance will include the identification of a cross-stakeholder group that will:

- Provide regular and actionable feedback to the Superintendent, School Committee, and Community on:
  - The development of the District's Vision, Strategic Plan, and other deliverables
  - Progress towards the Key Priorities and Success Criteria established in this process using the Metrics and Milestones
  - Share regular progress and improvement updates with other stakeholders and the community at large as to whether critical milestones are being met
  - At regular intervals monitor the Strategic Plan's roadmap and the initiatives against Metrics and Milestones
  - Communicate with other stakeholders on any proposed changes or modifications to any of the outputs of the process
  - Support change management activities associated with the Vision and Strategic Plan and champion its adoption among stakeholders

### **Project Timeline**

Arlington Public Schools will solicit proposals and price quotations from consultants beginning on February 9, 2022. All proposals and seal price quotations must be received physically by the Arlington Public Schools Business Office no later than 1 PM on February 24, 2022. The Business Office is on the 6th floor at 869 Massachusetts Avenue, Arlington, MA 02476.

Arlington Public Schools stakeholders will review proposals and interview proposers. The winning proposal will be referred to the Business Office to finalize the contract. The work of the strategic planning process is scheduled to begin in February 2022.

The Visioning and Strategic Planning process will include up to 50 stakeholders from the Schools, Town leadership, and the Community. The process for identifying those participants will be determined by the Superintendent in consultation with the Consultant and include a broad range of voices. Various activities will be required to identify and prepare participants including soliciting letters of interest, vetting letters of interest, selecting participants, and communicating those selection decisions. For community volunteers, we anticipate offering a stipend for their involvement. Teachers will receive contractually determined compensation. For APS students, a forum will be provided where they can have real responsibility for determining what questions to ask, how to gather information, and how to synthesize and communicate it.

Selected process participants will be asked to review materials and District data prior to the beginning of the process. Steps will be taken to help ensure all process participants are prepared to contribute at the beginning of the process:

Once the contract is awarded, the following project timeline will be followed:

#### Phase 1 - Initial Planning (March 2022)

The Consultant will provide both expertise on the outcomes under development and will serve as an experienced, independent facilitator of the process. The selected Consultant will be expert with vision and strategy development in Preschool-Grade 12 field. The Consultant will provide a **Schedule**, bring artifacts and **Templates** to accelerate our work, and provide explicit and engaging **Workshop Structures**.

#### Phase 2 - Visioning (April - June 2022)

We anticipate that the consultant will **Facilitate Visioning Workshops** to be held bi-weekly, for 2-3 hours. These workshops will involve all process participants (~50). The Consultant should consolidate and advance materials between meetings.

Sub-groups will be established to work on particular aspects of the visioning process. At the conclusion of the visioning workshops, deliverables will be drafted, reviewed, and developed in final form by the Consultant. The Vision, comprising the five components described earlier, will be presented and discussed in public and adopted by the District in June.

With work underway on the Vision, a subgroup will be formed to address the question of governance of the Vision and Strategic Plan. This subgroup will develop recommendations on the most effective approach to governing the Vision and Strategic Plan, including associated initiatives. These recommendations will be shared with the participants in the process and incorporated into the recommendations in June.

Change planning will happen in parallel with the visioning and strategic planning process. In the spring a sub-team focused on change will develop the first iteration of a **Change Plan** focused on communicating the proposed vision to stakeholders. During summer and fall 2022, the change plan's first iteration will be set in motion with anticipated communications, education, and training.

In the fall of 2022, change planning will continue as strategic planning evolves. The change plan's second iteration will support strategic plan implementation.

#### Phase 3 - Strategic Planning (July to December 2022)

The **Strategic Plan** will provide the roadmap for realizing the ambition as articulated in the Vision. We anticipate that the development of the Strategic Plan will be led by a sub-group of the visioning

committee and the Consultant in working sessions. The key initiatives identified in this process will be specified in time to include in the District's budgeting process.

**Required Deliverables (table)**

<b>Project Phase</b>	<b>Deliverable Name</b>	<b>Approximate Dates</b>
Initial Planning	<b>Work Plan: Templates, Schedules, and Workshop Structures</b>	March 2022
Visioning	<b>District Vision</b>	June 2022
	<b>Change Plan</b>	Iteration 1: June 2022 Iteration 2: December 2022
Strategic Planning	<b>Strategic Plan</b>	December 2022

**Proposal Submission Requirements**

- A work plan describing methodologies, approaches, and roles and responsibilities for how the work will be accomplished
- A detailed description of deliverables and outcomes
- Timeline for all work plans
- Firm fixed-price proposal for the outlined scope of work (sealed separately)
- Hourly rate for any work outside of committed scope, rate fixed for 12-months
- Evidence of experience providing consulting services, including strategic planning
- Relevant experience in the K-12 education sector
- Short biographies, including professional training, of the proposed project team members
- A sample list of past and current clients in the public schools
- Contact information for a minimum of 3 relevant references

Preferred:

- Experience and philosophy regarding your work as part of a multicultural/multiracial team

**Communication**

- The Consultant shall work collaboratively with the Superintendent throughout the process and keep them informed about what is occurring at each audit stage.
- The Consultant shall complete a written summary of findings, make recommendations and suggestions, and include a strategic plan for publication.

**Consultant Conditions**

Travel expenses are not included as separate allowable expenses. Travel is considered overhead to the consultant.

### **Minimum Evaluation Criteria**

- a. The Proposer must be available to execute this contract by February \_\_, 2022
- b. The Proposer is available to make a presentation and be interviewed at a scheduled meeting no earlier than \_\_\_\_\_, 2022 and no later than \_\_\_\_\_, 2022.

### **Comparative Evaluation Criteria**

#### **1. Proposer's Experience**

**Highly Advantageous:** The Proposer has five (5) or more years experience in conducting successful strategic planning processes with public school systems, other educational institutions, and other non-profit organizations, and during the past five (5) years has concluded at least three (3) successful strategic planning processes, one (1) of which must have been for a district of similar size and demographics as Arlington.

**Advantageous:** The Proposer has at least three (3) years experience in successful strategic planning processes and has concluded at least two (2) successful strategic planning processes with Massachusetts public school systems.

**Not Advantageous:** The Proposer has fewer than three (3) years experience in successful strategic planning processes and has concluded only one (1) successful strategic planning process with Massachusetts public school systems.

**Unacceptable:** The Proposer has fewer than three (3) years experience in strategic planning processes and has not concluded any successful strategic planning process with Massachusetts public school systems.

#### **2. Evaluation of the Proposed Plan:**

**Highly Advantageous:** The proposal contains a clear and comprehensive plan that addresses all the objectives stated in the Scope of Service and Proposal Submission Requirements.

**Advantageous:** The proposal contains a clear plan that addresses most of the project objectives stated in the Scope of Service and Proposal Submission Requirements.

**Not Advantageous:** The proposal does not contain a clear plan.

**Unacceptable:** The proposal fails to meet the objectives stated in the Scope of Service and Proposal Submission Requirements.

### **3. Evaluation of Presented Materials**

**Arlington Public Schools may schedule interviews with any Proposer. Interviews will be ranked as follows:**

**Highly Advantageous:** Proposer for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals, objectives, and deliverables of the Arlington Public Schools, and successfully responded to all questions from the Strategic Planning Facilitator Selection Committee.

**Advantageous:** Proposer for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals and objectives of the Arlington Public Schools, and successfully responded to most of the questions from the Strategic Planning Facilitator Selection Committee.

**Not Advantageous:** Proposer for this project was present but did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, did not demonstrate awareness and understanding of the goals and objectives of the Arlington Public Schools, and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Strategic Planning Facilitator Selection Committee.

**Unacceptable:** Proposer for this project was not present and did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, demonstrated awareness and understanding of the goals and objectives of the Arlington Public Schools, and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Strategic Planning Facilitator Selection Committee.

### **4. Evaluations of Interview Presentation:**

**Highly Advantageous:** The Proposer's presentation was clear, well organized, and demonstrated both effective communication skills and an understanding of the particular needs of the Arlington Public Schools community.

**Advantageous:** The Proposer's presentation was clear, well organized, and demonstrated effective and sensitive communication skills.

**Not Advantageous:** The Proposer's presentation was disorganized or did not demonstrate effective communication skills.

**Unacceptable:** The Proposer's presentation demonstrated a clear lack of communication skills.

Any questions regarding the proposal should be directed to both Elizabeth Homan, Superintendent, at [ehoman@arlington.k12.ma.us](mailto:ehoman@arlington.k12.ma.us) and Michael Mason, Chief Financial Officer, at [mmason@arlington.k12.ma.us](mailto:mmason@arlington.k12.ma.us).

All proposals should include a signed statement of non-collusion.

Bid Submission:

One hard copy of technical proposal and one electronic copy shall be submitted in a sealed envelope marked "Request for District Vision and Strategic Planning Facilitation — Technical Proposal" and one (1) copy of the price proposal in a sealed envelope marked "Request for District Vision and Strategic Planning Facilitation - Price Proposal"



CERTIFICATE OF NON-COLLUSION  
MANDATORY

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Name of Company or Corporation

\_\_\_\_\_  
Authorized Official's Signature

**BIDDERS/RESPONDENTS MUST SUBMIT THIS FORM FULLY COMPLETED.**