# MAPE - Minnesota Association of Professional Employees Logo

# REQUEST FOR PROPOSALS (RFP) for STRATEGIC PLANNING SERVICES

Minnesota Association of Professional Employees (MAPE) is requesting proposals from interested, qualified, and experienced professional strategic planning firms or individuals to provide strategic planning and facilitation services. A Request for Proposals (RFP), which includes instructions for its completion, is attached. Respondents to this RFP shall submit a digital copy of their completed proposal to MAPE Statewide President Megan Dayton ([mdayton@mape.org](mailto:mdayton@mape.org)) no later than 4pm CDT on Friday, July 30, 2021. Questions regarding this solicitation must be submitted in writing also to Megan Dayton at ([mdayton@mape.org](mailto:mdayton@mape.org)). Answers will be provided in writing to the requestor, or provided in amendment(s) to the solicitation. The final date to submit questions is Monday, July 26, 2021 at 4pm CDT.

# INTRODUCTION

The Minnesota Association of Professional Employees (MAPE) is seeking proposals, due no later than 4pm CDT on July 30, 2021, from consultants or firms to guide the organization with the development of a Strategic Plan. The anticipated Period of Performance will include a six-month period to provide adequate time for participation by MAPE Executive Committee (Executive Committee) and MAPE Board of Directors (Board), in addition to input and review by key community stakeholders. Additional or fewer Period of Performance requirements are at the discretion of MAPE.

The primary deliverable of this contract and process will be a written organizational strategic plan document that presents the planning process, research, analysis, opportunities, and strategies along with an implementation plan that will guide MAPE activity for the next three- to five-years. This RFP requests professional services of a consultant to facilitate the strategic planning process. MAPE is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful firm or expert should be able to discern which model(s) will best enable MAPE to define, develop, and complete its organizational and programmatic goals. Based on the proposals received, the Executive Committee will select individuals or firms to be interviewed. As a result of those interviews, the top‐rated consultant will be selected by the Board for contract negotiations. Proposals must be responsive to MAPE’s request. MAPE shall determine the most responsive and responsible consultant providing the best service at the most reasonable cost. Cost alone shall not be the determinative factor. MAPE reserves the right in its absolute discretion to make no award or contract.

# BACKGROUND

MAPE is an independent union providing sole representation to approximately 15,000 professional-level employees of the State of Minnesota since 1980. MAPE also represents the professional and supervisory employees in Babbit, Balaton, Canby, Cannon Falls, Cass Lake, Chisholm, Dilworth, Faribault, Forest Lake, Granite Falls, Hibbing, Little Falls, Minneota, Nashwauk, Tower, Tyler, Virginia and Warren.

MAPE members work in all segments of State of Minnesota service, and they are significant contributors to the high quality of life that is enjoyed by all Minnesotans. Some of this work involves:

* guarding the environment;
* ensuring that food and water are safe for the general public;
* overseeing the insurance, apartment rental, and sales industries, as well as cosmetology;
* animal husbandry;
* keeping buildings safe;
* resolving tax problems;
* financial and legislative auditors keeping a watchful eye on government;
* forensic scientists solving some of the most difficult criminal cases;
* parole experts;
* caring for Minnesota’s most vulnerable residents;
* licensing nursing homes to be sure that our elders are safe, and foster care homes to ensure that kids who need a second chance will have one;
* assist those who need help with child care costs in order to work, and those who need help paying for medical bills;
* providing policy and automation support to any number of social service agencies around the state;
* ensuring that Minnesota remains a comfortable and caring place to grow up and grow old in;
* psychologists and treatment therapists working with the most difficult segments of this state's population’
* providing critical care to the most severely physically and mentally disabled reside in our regional treatment centers;
* providing chemical dependency counseling and sex offender treatment;
* keeping the State's post-secondary educational system on track;
* running training classes to fit industry needs;
* counseling and assisting students in their educational journeys at community colleges, vocational or technical schools, and state universities;
* counseling and training those who have lost their jobs, and helping residents find new work and build new careers;
* helping injured workers receive disability benefits or retraining;
* designing, building, and maintaining computer systems that make it possible to conveniently access a wealth of programs and services; and
* researching and providing information to the Minnesota Legislature to help develop laws and policy.

MAPE employs a democratic governance model, with a Board of Directors consisting of elected member-leaders, an Executive Committee consisting of elected member-leaders serving in statewide officer positions, and a paid Executive Director and staff.

MAPE is currently without a strategic plan, the most recent plan having expired in 2019. The last strategic plan sought to move MAPE from a service model to an organizing model as a way to build and maintain power in order to continue being effective at representing our members’ interests.

From the most recent plan:

**Vision –** Organize, develop leaders, and build power to change lives for the better.

**Mission –** Represent our members with respect to all terms and conditions of employment, to promote the welfare of the membership, and to advance the interests of all governmental employees.

**Core Principles –** *We believe in…*

**Human Capacity** – Every individual has the capacity to know what is good, to grow in that knowledge, to govern for the common good, and to be a co-producer of justice in the world.

**Democracy –** Rule by “the people” — is the best form of human governance to produce a just society. MAPE wants its members to have the imagination and capacity to govern in the tension between their particular self-interests and democratic principles that apply to the whole. We operate our union in this way and we support democracy in the broader society.

**Active Participation and Citizenship** – Democracy is much more than voting or electing decision makers, it requires active participation from everyone. MAPE sees all its individual members as policy makers. Their decisions leverage resources that impact the well-being of themselves, others, and future generations. MAPE members are obligated to develop their capacity to govern in the tension between their particular interests and what is good for the whole. The outcome produces greater justice for everyone. MAPE gives individuals a place to learn and practice active citizenship and to organize others to do the same. In so doing, MAPE becomes stronger while helping to improve society as a whole.

**Political Competence** – Politics is the “work of the citizen.” MAPE members are citizens who must develop the political interest, discipline, and skills needed to fulfill the obligation to organize and govern for the common good. We are all responsible for developing political competence to define problems, produce solutions and establish common agreements that improve life for MAPE members and for the people of Minnesota.

**Institutional Efficacy** – MAPE is an institution organized by members for the common good. Institutions are obligated to sustain democratic values of our society. When institutions do not meet these needs, we are all obligated to organize them so that they do. MAPE members are obligated to effectively organize to build power for the common good. We are all responsible for doing this is a manner that is financially responsible and cognizant of the competing burdens felt by all.

**Decision Making Standards –** MAPE recognizes that representation without active participation is a hollow form of democracy. As the MAPE Board of Directors carries out its work and oversight of the implementation of this plan, the Board and all those involved are accountable for adhering to the following decision-making standards:

* Those impacted by a problem help define the problem in light of our core principles and the realities in which the problem occurs.
* All stakeholders are accountable for producing resources to solve the problem.
* All stakeholders are part of the policy function of the work.
* All stakeholders implement policies grounded in our core principles in the places where they have the authority to act.

**Commitment to Relational Organizing –** As an organization, MAPE is committed to relational organizing as the primary approach we take to building power for the common good. Relational Organizing refers to a sustained relationship building and educational process where people come to deeply understand that their own self-interests are closely tied to the self-interests of others in their organization and community, and that by acting together, people create power to change things for the better.

In June 2020, MAPE developed six tactical goals to serve as a bridge between the 2017-19 Strategic Plan and its replacement, a three- to five-year plan originally to be developed internally by July 2021 and adopted by our Delegate Assembly in September 2021.

These goals are:

1. Protecting the health, safety, and jobs of our members;
2. Working with allies to help the state find resources to keep as many people employed as possible;
3. Preparing the environment in which we negotiate, including calling for a robust public sector;
4. Protecting the fairness of elections and mobilizing our members to have an impact on the elections;
5. Increasing membership to 75 percent; and
6. Developing and aligning the organization around a three-year strategic plan.

Additionally, MAPE determined the following foundational commitments:

* Develop an equity framework for all priorities.
* Identify, recruit, develop and train members to encourage active participation.
* Build and deepen our relationship with partner organizations.
* Advance the interests of state employees.

MAPE is facing the same issues as other public sector labor unions, specifically:

* constant attacks from well-funded, anti-labor forces and organizations;
* constant need to maintain and grow membership since loss of fair-share dues;
* building solidarity across a membership that is reflective of the general population in terms of political alignment and worldview;
* aligning priorities across varied interest groups across membership;
* building coalition strength with labor and community partners; and
* building engagement opportunities for membership that translate into a high percentage of members participating in Union actions.

Additionally, MAPE has experienced organizational change in the form of the first female Statewide President, who is also the first new Statewide President in twelve years. The Executive Committee and Board have taken stances on social issues on behalf of the membership which is a departure from past practice of neutrality on all issues not directly related to contract improvement and a source of conflict among different segments of our membership. Like many organizations, MAPE is struggling to work through racial tensions and potential changes in leadership.

MAPE’s goal for a new strategic plan is to develop both strategic goals and an implementation plan. The plan will clearly identify responsibility and objectively-measurable actions working toward a stronger, more cohesive union. The goals and plan must also address appropriate funding in order to meet current and future challenges.

# GENERAL SCOPE OF SERVICE REQUIRED

As envisioned, the scope of services for this proposal will include the following components:

## GENERAL PROJECT MANAGEMENT

The Consultant will (1) work with the Executive Committee to develop and finalize the strategic planning process; (2) validate MAPE’s objectives for this project; (3) outline Executive Committee, Board, staff, and consultant roles and responsibilities for the project; (4) develop a work plan to guide project activities and communications; (5) conduct an orientation and multiple briefing sessions for the Board and key stakeholders on project goals and the potential outcomes; and (6) be available for presentations to the Board, including but not limited to a presentation of the final version of the strategic plan developed through this project.

Development and implementation of techniques/initiatives to promote member involvement designed to engage the membership, potential members and MAPE’s leadership throughout the process is critical.

All materials developed for this project and presented to the Executive Committee and Board must be accessible per accessibility requirements (Section 508) and best practices (W3C WCAG 2.0).

## PHASE ONE – DISCOVERY (estimating timing: two months)

* Evaluate previous strategic plan and interim tactical goals to serve as a baseline from which to build.
* Conduct stakeholder interviews and focus groups with key leaders and constituencies including, for example: MAPE Board members; MAPE staff; MAPE members and member-leaders; potential MAPE members, as well as online survey to assess (1) overall satisfaction with the Union; (2) reasons for being a member or non-member; (3) MAPE priorities; (4) interest in engagement; (5) member agreeability to a change from a single dues rate to a progressive (based on pay rate) dues structure; (6) thoughts on potential restructure around agency rather than region; (7) ideas about a post-COVID workplace; and (8) other areas as suggested by the vendor.
* Compile analyze and present available economic outlook and political environment data for the State of Minnesota as it relates to agency budgets, growth, and attitudes toward public workers and unions.
* Conduct a situational analysis of the union to identify and assess the strengths, weaknesses, opportunities, and threats to the mission and purpose of MAPE.

## PHASE TWO – MEET and RETREAT (estimated timing: one month)

MAPE envisions holding a one‐ or two‐day Board retreat dedicated to this effort. We seek input from a consultant or firm to help structure and facilitate the event to maximize impact. Meeting topics will align with information and data collected during DISCOVERY and will include:

* Organizational Overview – Assessment of the strengths, weaknesses, and competencies of the organization.
* External Overview – Assessment of opportunities and threats facing MAPE in coming years. The assessment will include information on availability or significant limitation of resources and tools that MAPE could use to add value and further its goals.
* Methodology – The consultant will describe the methodology used to identify vital challenges and opportunities identified.
* Identification of Opportunities, Strategies, and Vision – Refining the vision for MAPE which identifies its priorities, opportunities, and strategies, and clarifies MAPE’s role and confirms its mission and values.
* Defining Future Access or Limiting Factors – Fiscal needs and implications related to potential strategic pathways.

## PHASE THREE – DOCUMENT and VET (estimated timing: two months)

Following the retreat or other collaborative planning meetings, the consultant and the Executive Committee will draft a strategic planning document for review and presentation to MAPE’s Board of Directors. The consultant will participate in the drafting, reviewing, and refinement of this document. The Executive Committee and the consultant will work collectively to develop a series of communication and input techniques designed to keep the Board of Directors, member-leaders, members, and potential members engaged in the identified goals, objectives, and initiatives of the Organizational Strategic Plan. At a minimum, the consultant will provide the following deliverables:

1. draft Strategic Plan document;
2. executive summary of the draft Strategic Plan; and
3. recommended package of materials suitable for distribution and outreach.

PHASE four – APPROVE and LAUNCH (estimated timing: one month)

The consultant will lead production of a final Strategic Plan document that includes an implementation plan with defined milestones and benchmarks. MAPE’s Board will use this document to manage activities and measure progress, including regular audit periods as necessary. This document will be presented for approval by MAPE’s Board of Directors. This document must meet

# ELIGIBILITY

Each offeror shall specifically identify in its proposal, whether or not any potential or actual Organizational and Consultant Conflicts of Interest (OCCI) exists for this procurement. If the offeror believes that no OCCI exists, the OCCI response shall set forth sufficient details to support such a position. Offerors shall submit with their proposal an OCCI certification, using the following language:

The offeror [\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_] is not aware of any information bearing on the existence of any potential organizational conflict of interest. If the offeror is aware of information bearing on whether a potential conflict may exist, the offeror shall provide a disclosure statement and mitigation plan describing this information. Prospective firms or entities are not eligible to submit a proposal if current or past corporate or other interests may, in the opinion of MAPE, give rise to a conflict of interest in connection with this RFP or the Services. Firms and individuals are to submit with their proposal documents a description of any issue that may constitute a direct or indirect conflict of interest for review by MAPE. MAPE’s decision on this matter will be final.

# PROPOSAL SUBMISSION REQUIREMENTS

Each offeror shall be responsible for preparing an effective, clear, and concise proposal that is accessible per accessibility requirements (Section 508) and best practices (W3C WCAG 2.0). Offerors must state their level of compliance to these standards as part of their proposal.

It is recommended that proposals contain the following information:

* A cover letter introducing the company and the individual who will be the primary contact person. Proposed statement of work, project approach, and plan to accomplish the work. Describe in detail the project approach and methodology in managing and implementing a project of this size and scope and experience in developing and supporting the implementation of a comprehensive strategic plan. Key elements include (1) project understanding; (2) project methodology and Deliverables (3) roles and responsibilities; and (4) project management.
* Specific qualifications regarding experience in strategic planning services, particularly with labor unions, including the names of clients doing similar work as MAPE or in the non-profit and community organizing fields. A reference list should be attached to the proposal, with client names, contact persons, and phone numbers.
* A detailed timeline for completion of each phase and the total project. MAPE is interested in pursuing this strategic plan in as expeditious a manner as possible.
* A description of the firm and individual qualifications.
* A description of two or three projects of a similar scope, magnitude, and complexity to the work described in this solicitation.
* A pricing narrative with a proposed fee schedule for each phase of the project, including any incidental or travel fee estimates.
* The signature of an authorized individual to bind the firm. The proposal must be a firm offer for a 60-day period.

# SELECTION PROCESS

Each of the proposals received will be evaluated based on the stated requirements. Failure to meet these requirements will be cause for eliminating the consultant from further consideration. Initial evaluation of the proposals will be made by MAPE’s Executive Committee. In addition to evaluating written proposals, in-person interviews will be requested.

MAPE shall not be liable in any way for any costs arising incurred by any consultant in the preparation of a proposal in response to this RFP or any losses or damages arising from MAPE’s rejection of any proposal for any reason whatsoever.

Proposals will be evaluated on the following criteria:

|  |  |
| --- | --- |
| **Technical**  Approach and methodology (20 points)  Proposed work plan (15 points) | 35 Total points |
| **Management**  Firm relevant experience (20 points)  Qualification and experience of proposed key staff (15 points) | 35 Total points |
| **Cost** | 30 Total points |
| **Total** | 100 points |

# PROPOSAL REVIEW AND AWARD SCHEDULE

An electronic PDF must be received by MAPE no later than 4pm CDT on Friday, July 30, 2021. Proposals received after this deadline will not be considered. The Executive Committee shall make a recommendation at the August Board meeting (third Friday) to MAPE Board of Directors, who retain final approval of contract. Work may begin immediately following contract execution with finalist.

All parts of this project, including the RFP, interview process, and strategic planning process should be considered confidential, whether or not any portion of it is explicitly stated as such.