



## **Request for Proposal**

### *Development of Employee Workplan Tool to Support Implementation of Organization Strategic Plan*

Interfaith Partners for the Chesapeake (IPC) is a growing non-profit that mobilizes faith congregations throughout Maryland, and beyond, to restore the Chesapeake. We have just finalized a new 3-year strategic plan that we are now translating into three 1-year annual work plans for staff. To aid in tracking progress on those work plans as well as individual employee performance in meeting stated goals, we seek to create an Airtable Base that delineates individuals goals/work plans and how those all integrate into the single organizational strategic plan.

#### **Background**

IPC works to inspire and equip people of faith to honor, protect, and restore our shared watershed. We finalized our 2022-2024 strategic plan in November 2021. The staff will develop annual work plans, one year at a time, beginning with a 2022 Work Plan, which constitutes Year 1 of the strategic plan. We seek a consultant to develop an Airtable Base that will help us track progress on implementation of the 2022 Work Plan as well as individual employee performance on their specific goals and work plans.

#### **Overview of Needs**

We seek an Airtable Base that is malleable and customized to suit our specific needs:

1. Must be able to nest individual employee work plans and goals within the objectives and goals of the strategic plan. There are five (5) goals in the strategic plan, and each has 3-5 objectives.
2. Ability to create employee-specific views so that they can easily see and update their work plan.
3. Bases must offer visualizations of progress of completion of the work plan, space for notes and attachments, automated notifications to supervisors regarding progress or missed deadlines, summaries of percent completion of tasks. Other features to be built into the Base may be added, if appropriate, during planning discussions at the beginning of the project (see Scope of Work below).
4. Supervisors must be able to quickly view progress on an employee's work plan, what is overdue, and how progress/status will impact other tasks in the objective or goal that relate to or could impact other employees' work.
5. The Executive Director must be able to view progress of the strategic plan overall with the ability to drill down into delays to pinpoint sources of delay so that adaptive management can ensue.
6. Base shall offer easy-to-export visualizations of the progress on any goal, objective, and the overall 5-goal plan.
7. Base should be able to talk to our Timesheets Base so that when employees track time on specific projects it reflects those hours in the Work Plan Base.

#### **Scope of Work & Deliverables**

Specifically, the consultant shall:

1. IPC has begun to use Airtable in many facets of our operation, and therefore we will only consider proposals that address our need to stay within the Airtable platform.
2. Facilitate a series of meetings with IPC staff (number of meetings to be proposed by the consultant in their proposal) to determine our needs and how they will be addressed in the Airtable Base.
3. Develop a prototype of the Base and allow for testing by some of the staff. Facilitate feedback from staff to inform adjustments needed to the Base.
4. Develop and launch a finalized Base no later than February 15, 2021.



5. Train staff on how to use the Base. Allow for a period of time for trouble-shooting as the Base goes live and staff encounter questions or issues.

### **What Our Team Can Provide**

1. A subscription to IPC's Airtable platform for the period of time in which the scope of work is being carried out.
2. IPC created a Work Plan Base in Airtable in 2021 that offers a starting point for what we envision we need. We have some ideas on ways it can be strengthened. Full access to this Airtable Base will be provided as a starting point for your work, if that is helpful. Offered here are two shared views: [Goals/Objectives View](#) and [Initiatives View](#).
3. The Executive Director, Director of One Water Partnership, and Office Manager will make themselves available for meetings and to answer calls/emails as needed throughout the project.

### **Proposal**

Consultant shall prepare a written proposal for the scope of work described herein that provides:

1. Description of how the scope of work will be executed and your methodology. Please be clear about what you expect of IPC throughout this process and what is expected of your firm.
2. Deliverables to be provided and associated timeline.
3. Detailed summary of the cost of your services. Proposals shall not exceed \$8,000. If add-on apps will be necessary, clearly identify those apps, why they were chosen, and their annual subscription costs. Please be aware that if these costs are great than \$1,500 per year, they will be considered prohibitive.
4. A statement of qualifications and similar projects (if any) already completed by firm. Be sure to clarify if you have expertise in working in Airtable.

IPC will choose a consultant Based on these factors:

- 40% weight – Proposed methodology addresses our needs, thoroughness of scope of work, thoroughness and clarity of proposal, clearly states what the deliverables will be and associated timelines
- 30% weight – Proposal cost (preference given for lower-cost proposals) and whether cost justification is clear
- 30% weight – Firm's experience and qualifications

### **Proposal Selection Timeline**

Proposals will be accepted until December 17, 2021. **Proposals shall be submitted via this online form:**

<https://airtable.com/shr6GRXqOmlI06vAo>. A minimum of three (3) proposals will be compared before making our final selection. The consultant will be selected no later than January 7, 2022. Contracts will be executed as soon as possible after selection of the consultant.