



Request for Proposal

**STRATEGIC PLAN DEVELOPMENT PROJECT
2017 – 2018**

November 14, 2017

374 Grand Avenue
New Haven, CT, 06513

REQUEST FOR PROPOSAL

STRATEGIC PLAN DEVELOPMENT PROJECT 2017 - 2018

Fair Haven Community Health Clinic, Inc. (Fair Haven), a Federally Qualified Health Center (FQHC), is seeking proposals from highly experienced and successful strategic planning consultants to facilitate a short-term, accelerated strategic planning process that results in a document that establishes its future strategic direction. We are an integrated medical, behavioral health and oral health care FQHC with a main site located at 374 Grand Avenue, New Haven, Connecticut.

Timeline: RFP Schedule

- RFP release date is Tuesday, November 14, 2017 by direct email to vendors and public announcement/listing to the general public on www.fhchc.org.
- Final proposal documents are due to Fair Haven on Monday, November 27, 2017 by no later than 12 Noon Eastern Time via email to r.hoffmann@fhchc.org or in-person delivery to the Front Desk/Reception Area at Fair Haven's main site at 374 Grand Avenue, New Haven, CT. Please address the envelope as indicated below:

Attention: Robyn Hoffmann, RN, MSN, CHC (Corporate Compliance Officer)
"PROPOSAL FOR STRATEGIC PLAN DEVELOPMENT PROJECT"
FAIR HAVEN COMMUNITY HEALTH CLINIC, INC.
374 Grand Avenue, New Haven, CT 06513

Bids from women and minority owned businesses are encouraged.

STRATEGIC PLAN DEVELOPMENT PROJECT 2017 - 2018

I. INTRODUCTION & OVERVIEW

Fair Haven Community Health Clinic, Inc. (Fair Haven) is requesting proposals from highly experienced and successful strategic planning consultants to facilitate a strategic planning process that results in a document that establishes its future strategic direction.

Fair Haven is a Federally Qualified Health Center (FQHC) that provides a wide range of health care services to residents in the Fair Haven section of New Haven (CT), and through a New Access Point in 2015, to the neighboring city of East Haven, CT. The target population is New Haven and East Haven residents who are most vulnerable: people with low incomes living on substandard wages, families without health insurance, minorities with higher rates of chronic illnesses, the elderly, frail population who have difficulty ambulating and getting about, and children who are too often hungry without adequate food and nutrition.

Fair Haven's main site at 374 Grand Avenue in New Haven and its more recently opened satellite sites at 50 Grand Avenue in New Haven and 370 Hemingway in East Haven offer a full range of integrated and comprehensive primary care to people of all ages regardless of ability to pay: children, adolescents, adults and seniors; men, women, intersex, gender non-conforming, and transgender individuals; the uninsured and underinsured, low income wage earners, and people receiving public assistance. No one is denied access to any service based on an inability to pay. Behavioral health services are offered at all sites and are integrated with primary care. Oral health services are offered to patients at 50 Grand Avenue and on our Smiles 2 Go Dental Van.

In addition to providing comprehensive primary care to patients across the lifecycle, Fair Haven also offers the following ambulatory specialty services: Addiction Medicine, Allergy, Dermatology, Endocrinology, Gastroenterology, Infectious Disease, and Psychiatry. Fair Haven also provides on-site Optometry and Podiatry services to its patients. Through arrangements with a series of independent pharmacies and pharmacy chains, Fair Haven can extend 340B discounts on prescription medications to uninsured and under-insured patients.

Fair Haven's site at the Bella Vista Housing Complex serves a geriatric and disabled population. The site at Bella Vista is within a housing complex available solely to the elderly and disabled. On-site behavioral health services are provided and patients requiring dental services are referred to 50 Grand Avenue.

Fair Haven provides care at four (4) School Based Health Centers (SBHCs) in New Haven and before the close of 2017, will add two (2) SBHCs in East Haven. Fair Haven's Smiles 2 Go Dental Van provides dental services at eight (8) schools in New Haven.



Fair Haven's electronic health record, Epic, is implemented at all of our clinical sites and is shared with Yale New Haven Hospital and many providers in the greater New Haven community. Fair Haven is certified as a Primary Care Medical Home by The Joint Commission (TJC) and has Patient Centered Medical Home recognition through the National Committee for Quality Assurance (NCQA). The overall agency budget is over \$20 million and we employ 216 people.

II. SCOPE OF WORK

Fair Haven seeks proposals that would not exceed thirty thousand dollars (\$30,000) total for all deliverables. This RFP requires that the consultant is able to facilitate efforts that include but are not limited to the following:

1. Finalize mission, vision, and values statement
2. Assist the Executive Management Team and the Board of Directors in the development of strategic priorities, goals, and metrics to evaluate success
3. Develop a series of outcome metrics that will be incorporated into the template used for the Chief Executive Officer's annual performance evaluation
4. Optional: Add an additional section entitled, "**Additional Scope**" under the scope of services if the Consultant suggests any additional functions that would enhance this project, with an understanding that the total cost of this project cannot exceed thirty thousand dollars (\$30,000).

Overall Approach (may include but is not limited to)

1. Conduct a SWOT Analysis to assess Fair Haven's current market position, evaluate the strategies and tactics of competitors and use the results to inform future organizational goals, action plans, objectives and metrics.
2. Analyze the current and projected demographics of our primary, secondary and tertiary service area using multiple data sources (the Consultant is expected to use reports and data from most recent patient and staff surveys, 2016 Needs Assessment and reports from other consultants currently under contract, etc.).
3. Identify and evaluate potential marketplace forces related to health care reform and other factors that will influence the demand for services and the future evolution of Fair Haven Community Health Care.
4. Evaluate and quantify the need to expand or reconfigure services, programs and facilities to support the vision and goals for the organization and the changing health care marketplace.
5. Define the infrastructure and resources needed to achieve goals and objectives including operations, organization chart, and/or administrative support.
6. Coordinate with and incorporate the work product of other consultants already retained and working on projects related to strategic planning.

Strategic Planning Committee

The process will be facilitated by the Consultant in conjunction with representatives from Fair Haven's



board of directors, executive management and staff. The Consultant's role will be to:

1. Design the strategic planning process,
2. Collect and analyze existing relevant data, plans, and reports,
3. Organize and facilitate meetings with staff and a one-day retreat for board members and executive management team members, and
4. Produce the strategic plan document.

III. THE CONSULTANT

The Consultant should have substantial experience in strategic planning in the health care environment, with a preference for those who have had similar engagements with other FQHCs. The Consultant should demonstrate that they possess current knowledge and expertise in addressing the following policy developments and health care system enhancements:

- Integrated primary care, behavioral health, and oral health.
- The State and National health care environment and health reform initiatives.
- Emerging technology expected to influence the delivery of health care in the future.
- Analytics and metrics used by health professionals.
- Social Determinants of Health.

IV. QUALIFICATIONS

This project will require the Consultant to have the following minimum qualifications:

- Five (5) or more years of experience performing the type of work required in this RFP. This shall include experience with FQHCs or ambulatory care centers.
- For non-solo consultants, a highly qualified staff with education, experience and knowledge of the disciplines and fields required by this work. This includes excellent interpersonal and communication skills.

V. TIMELINE

The Consultant is expected to meet all deadlines required. Additional deadlines may be added upon award of contract.

Timeline:

1. Board Retreat: Conduct a one-day board retreat by no later than **January 15, 2018**.
2. Needs Assessment: Incorporate the *2016 Needs Assessment* into the Strategic Plan by no later than **January 31, 2018**.
3. Strategic Goals: Establish metrics that allow the board of directors to evaluate the health center's progress in meeting the annual long-term strategic goals of the organization by no later than **January 31, 2018**.
4. Metrics and Data Reporting: Establish a calendar for reporting metrics to the board to evaluate the CEO and to monitor progress on goals by no later than **January 31, 2018**.
5. Completed Strategic Plan: **February 16, 2018**.

REQUEST FOR PROPOSAL TIMELINE

Timeline	Deliverables
Tuesday, November 14, 2017	Bid Release to public on www.fhchc.org and by email to current vendors.
Monday, November 27, 2017	Proposals due to FHCHC by 12 Noon via email to r.hoffmann@fhchc.org or in-person delivery to 374 Grand Avenue, New Haven, CT (Front Desk).
Wednesday, November 29, 2017	Bid award notification by no later than this date.
Monday, December 4, 2017	Work is expected to begin by no later than this date.

VI. PROPOSAL PREPARATION AND SUBMITTAL

The following content will be evaluated by the CEO and the STRATEGIC PLAN DEVELOPMENT TEAM and be used as the basis for selecting the vendor to provide the service. Proposals must conform to all requirements stated below and elsewhere in this RFP. Disregarding these requirements may result in disqualification of the proposal.

Before submitting a proposal, each firm shall familiarize itself with the entire RFP, including the Scope of Work and other factors affecting contract performance. The firm shall be responsible for fully understanding the requirements of a subsequent contract and otherwise satisfy itself as to the expense accompanying the fulfillment of the contract requirements. Proposals in excess of thirty thousand dollars (\$30,000) will not be reviewed. The submission of a proposal will constitute a representation of compliance by the firm. There will be no subsequent financial adjustment for lack of such familiarization.



For hard copy proposals, place all proposal materials in a sealed package envelope clearly marked with the proposal name:

Request for Proposal
Attention: Robyn Hoffmann, RN, MSN, CHC (Corporate Compliance Officer)
"PROPOSAL FOR STRATEGIC PLAN DEVELOPMENT PROJECT"
FAIR HAVEN COMMUNITY HEALTH CLINIC, INC.
374 Grand Avenue, New Haven, CT 06513
Firm Name and Address

It is the responsibility of the firm to ensure that proposals are received by email to r.hoffmann@fhchc.org or at the administrative offices of Fair Haven Community Health Clinic, Inc. located at 374 Grand Avenue, New Haven, CT by no later than 12 Noon on Monday, November 27, 2017. The firm is responsible for delivery of their proposal by the deadline notwithstanding any claims of error or failure to perform by a mail courier or package delivery service or by email failure.

The firm's proposal should be organized in sections as outlined below:

1. Cover Letter

All proposals must include a cover letter submitted under the firm's name on the firm's letterhead containing the signature and title of a person or an official of the firm who is authorized to commit the firm to a potential contract with Fair Haven Community Health Care. The cover letter must also identify the primary contact for this proposal and include the RFP title:

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The cover letter should express the firm's interest and serve as an executive summary of the proposal. Claims of proprietary information must be included in the cover letter.

2. Proposal Narrative

The proposal response should address all required areas within this RFP, follow the numbering format listed below and not exceed four (4) pages, excluding the cover letter. Please number each section as listed below. The proposal should:

1. Describe the lead consultant's qualifications to provide the requested products and/or services, number of years in business.

2. Explain the nature of the firm's business –include a description of experience, competencies, and overall organizational capabilities.
3. Identify the project lead and key team members (if more than one (1) person, please answer #4).
4. Describe the project staff structure, the background, qualifications and relevant experience of all staff involved in the project, including length of time with contractor; include the responsibilities that each staff member will have during the execution of this project.
5. Address the consultant's ability to meet the requirements of the scope of work described in the RFP.
6. References: The proposer must provide three (3) independent references from three (3) different projects of similar scope requested by Fair Haven.

3. Cost Proposal

The firm must provide itemized costs and total cost of project for all work, which may not exceed thirty thousand dollars (\$30,000). Fair Haven Community Health Clinic, Inc. is exempt from State and local taxes (sales tax).

VII. TERMS

1. Acceptance of Proposal: FAIR HAVEN COMMUNITY HEALTH CLINIC, INC. reserves the right to reject all proposals and to waive informalities, if, at its discretion, the interests of FAIR HAVEN COMMUNITY HEALTH CLINIC, INC. will be best served thereby.
2. Fair Haven Community Health Clinic, Inc. reserves the right to accept other than the lowest cost proposal. Fair Haven Community Health Clinic, Inc. reserves the right to negotiate contract changes following the award.
3. If there is any conflict between these documents and the proposal, these documents shall control.
4. Fair Haven Community Health Clinic, Inc. reserves the right to cancel this RFP in writing or postpone the date and time for submitting proposals at any time prior to the proposal due date.
5. No proposer shall have a right to make a claim against Fair Haven Community Health Clinic, Inc. in the event FHCHC accepts a proposal or does not accept any proposals.
6. Assignability: Vendor shall not assign any interest in the contract and shall not transfer any interest in the same, whether by assignment or invitation, without the prior



written approval of Fair Haven Community Health Clinic, Inc.

7. Nondiscrimination: Vendor will not discriminate against any employee or applicant for employment because of race, color, creed, religion, ancestry, sex, national origin, sexual preference, sexual orientation, gender identity, gender expression, genetic information, disability, age, marital status, or status about public assistance or as veteran.
8. Payment: Payments shall only be made in accordance with the agreed upon Contract. No reimbursements will be made for any expenses incurred by the Firm except for expenses specifically described in the Contract. No payment will be made for any incomplete, inaccurate or defective work until same has been satisfactorily remedied at no additional cost to FAIR HAVEN COMMUNITY HEALTH CLINIC, INC. All work performed and all related documentation records, etc., shall become property of FAIR HAVEN COMMUNITY HEALTH CLINIC, INC.
9. Payment/Billing: Payment/Billing for completed services shall be based upon the terms outlined in the final contract.
10. Vendor Responsibilities: The Vendor is responsible for conducting necessary research, visiting the site and becoming familiar with the organization.
11. Debarment and Suspension: The Contractor warrants and represents that neither it nor its principals, employees or agents who would perform services under this RFP are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any Federal or State department or agency.
12. Addenda to RFP: Any changes, additions or clarification so the RFP will be made by written Proposal Addenda.
13. Contract and Conditions: The selected vendor will be required to enter into a contract with FAIR HAVEN COMMUNITY HEALTH CLINIC, INC. FAIR HAVEN COMMUNITY HEALTH CLINIC, INC. reserves the right to negotiate a change or modification to any of the proposed contractual conditions.
14. Validity of Proposals: Proposals must be valid for a minimum of least sixty (60) days.

THANK YOU!