

RFP 538-12 Strategic Planning Process Facilitator

Addendum 001 Issued January 9, 2013

Below is additional information requested by interested vendors. We hope this is helpful to you in preparing your proposal. Please remember that proposals are due by 2:00pm Mountain Time on January 17, 2013. Please follow the submittal instructions carefully when submitting your proposal. CMC is not able to accept a late submittal as determined by Rocky Mountain E-Purchasing System. Remember to allow a few extra minutes for any technical difficulties, it is a good idea to submit a day ahead of the deadline if you can. The bid sheet must be included as an Excel file for your submittal to be considered.

1. What is the Colorado Mountain College's history of strategic planning? Is it a regular practice? How has it been conducted in the past? What is CMC's history in successful strategic plan implementation?

CMC recently revamped its strategic planning process under the guidance of the Board of Trustees to assure enhanced collaboration of the administrative College Leadership Team and the Board in long-term planning. There is a current existing three-year strategic plan that was prepared principally by an administrative committee. This document, with some alterations, will soon be considered for interim approval by the Board. The college has generally had a successful strategic plan but recently has lacked significant involvement by the Board of Trustees. We believe that an external facilitation specialist may help facilitate an improved process that better involves joint participation by administration and the elected governing Board. The facilitator will also ensure that the process engages the students, staff and faculty on our campuses as well as the business community, school districts and the general public.

2. We were intrigued by the following statement in the January 2011 Systems Portfolio for the AQIP, "long-term strategizing has not been CMC's strong suit." Two years later (January 2013), to what extent is that statement still true? Why/why not?

There are several moving parts in our organization that need to be coordinated in a strategic plan (an IT audit and Technology Master Plan, marketing, awareness of customer needs, operational improvements ferreted out through gap analysis, a Facilities Master Plan, policy development related to potential growth, alignment with state and federal metrics, the annual resource allocation process, etc.). It has been difficult for college personnel to successfully incorporate all of these parallel initiatives into a single comprehensive plan. Additionally, we have eleven campuses spread over a 12,000 square mile

area of a mountainous/resort region with differing demographics. Each location has emphasized strategic plan initiatives that meet their constituents' specific needs. We think our plan could be more collaborative and comprehensive.

3. What is the timeframe for completion of the various studies (e.g., facilities, IT audit, college process gap analysis, advertising/awareness campaign) intended to inform the strategic planning process?

The initial outreach should be completed in April and an outline of the draft ready for the May 14th Board of Trustees Strategic Planning retreat. This is also the time we hope to merge the various efforts mentioned above into a single draft strategic plan. A second round of outreach should be completed in early fall with the hope of having a fairly well vetted Strategic Plan that will accompany the AQIP delegation to the October 2013 AQIP Strategy Forum. After that input is synthesized into the Strategic Planning document, the final Draft Strategic Plan will be presented and discussed at the November Board meeting. It is hoped that the Plan would be ready for approval at the December Board meeting. It is important that the new Strategic Plan have very specific measurable goals that can be addressed through the budgeting process.

4. What data drove the decision to double tuition revenue in 5 years? When is the deadline (Academic Year)?

CMC has recently completed the construction, renovation and addition of campus facilities throughout our district and wants to assure sufficient capacity to support that growth.

5. Why a seven-year plan?

AQIP aligns best with a seven year plan.

6. Regarding the retreat in May, 2013, is this a regular annual retreat? What is driving the purpose and time of this retreat? Is there flexibility around the date and length of this retreat?

Retreats are customary but a retreat specifically dedicated to the Board working with staff to develop a long-range planning document has not occurred on a regular basis. There may be some flexibility.

7. In the RFQ (page 3), the scope of work #4 states, “expected meetings include campus/community outreach in March/April.” Please describe the extent of the outreach conducted via the AQIP process. What specifically is the strategic planning consultant expected to do?

For the AQIP process, CMC obtains feedback and ideas for future direction and improvement from internal (e.g. employees, Board members) and external stakeholders (e.g. businesses, foundation supporters, campus advisory committees). Feedback is obtained through surveys, focus groups, interviews, etc. The consultant would undertake these duties after conferring with the Office of Institutional Effectiveness on who the stakeholders are and how best to communicate with them. The consultant would then collect, organize, summarize and communicate the findings.

8. According to the RFQ, CMC has been collecting “market data.” What exactly does that include and how is it being collected? How it is being used?

Please refer forward to question 10.

9. CMC has already seated a strategic planning committee. What has the committee accomplished so far?

This committee has aligned the AQIP process with our strategic planning, facilities planning and budget processes. In December 2013 we expect to approve a new strategic plan to take effect 2014-2015.

10. Do you have workplace and/or stakeholder data that can be used as input to the project?

Yes, we typically gather data on/from the types of college stakeholders in the table below for decision-making, particularly when we are scanning the internal & external environment for planning purposes. We can provide existing data on CMC’s key stakeholders e.g. students, employees, communities, etc.

At 2011 Strategic Planning Meetings CMC's Stakeholders were identified as:

PRIMARY STAKEHOLDERS	SECONDARY STAKEHOLDERS
Students	Alumni
Full-time and Part-time Employees	Grantors
Full-time and Adjunct Faculty	4-Year Institutions
Board of Trustees	Community Members
Prospective Students & Their Families	Media
Tax Payers	Stop-Out Students
Accreditors	Global Community
Employers	State Legislators
School Districts (K-12)	Visitors/Tourists
Donors	Other Governmental Entities
Advisory Boards	Peer Institutions
	Non-Profits
	Special Populations
	Parents
	Families of Staff

11. Are you looking for more of a strategic planning event, or a longer-term process over the course of several months to develop focus and align the organization? Item #6-8 infer a period of time, but clarification would be helpful. The cost for a series of events is significantly different from an alignment process over several months.

We expect this process to start upon award and be completed at the end of December 2013.

12. Do you want change management be included in the scope of the project? If so, is the group the top level, middle level or worker level that you would like to have included in change management activities? We have found that great plans can be developed and implemented, but that even greater benefits can result if the organization supports the changes.

The Facilitator should bring to the process any ideas that have elsewhere proved effective in developing a Trustee-led planning paradigm that significantly involves all constituent groups.

13. Do you have a facility that can be used to provide lodging for a few consultants as onsite work is completed?

CMC may be able to provide conference room or work space from time to time as needed but lodging needs will have to be arranged by the successful bidder. CMC's local hotel rate is \$89 per night at the Hotel Denver near our administrative offices in Glenwood Springs. You would be free to use this hotel/rate or make any other accommodation that you'd like. Please submit a response that includes all of your expected expenses.

14. Would you be open to us collecting some of the data remotely through the use of collaboration software? This may help reduce out-of-pocket expenses.

Yes.

15. Are optional components acceptable in the proposal?

Absolutely welcome and encouraged. CMC considers you to be the expert and we are interested in your perspective on our needs. The award and contract will be subject to further definition and negotiation of scope upon award. The ultimate contract will include the process steps we agree on, and may be different than what's outlined in the RFP. Please submit your ideas; the selection committee will be interested in your process that has been successful in similar engagements.

16. Will the interviewees be comprised of the 20 members of the college leadership and 7 Trustees or are there additional stakeholders we should assume will be interviewed during the process?

At least some and maybe all of the people mentioned above will be interviewed, and there may be other interviews needed as well subject to our mutual agreement.

17. Regarding item #2 in the scope of work, it mentions that the facilitator will coordinate data and work product generated by other college teams and consultants. Will the other consultants mentioned here and in the background information provided be available to participate in planning meetings or team sessions as deemed necessary?

Yes. Facilitator will have access to all college personnel and partners as needed and agreed by CMC.

18. We understand there are five other initiatives and/or task forces that will provide data and work products that will impact the Strategic Plan. Do you have any additional information you can share regarding to what extent the Strategic Planning Facilitator will be involved in these efforts in order to coordinate the collection of this data?

These initiatives are being undertaken concurrently with the beginning of our strategic planning process. We do not expect the Facilitator to have any responsibility in collecting data related to these projects. However, the work products produced by each group will be material and we understand that a Facilitator may want to be involved at some level in these teams' final reports. To the extent that participation will assist the Facilitator we will work with everyone involved to find the right interaction. We do not intend for the Facilitator to work in a vacuum where these other initiatives are concerned.

19. What is the budget for this project?

We have not released a budget number. At this point we are trying to understand your approach and are interested in your perspective on the right financial and staff resource commitment that CMC should make in accomplishing our objective. We understand that you don't have a clear scope at this point to bid. Please provide your ideas, expectations and pricing structure. The scope will be mutually agreed upon. If you propose a flat fee for all or some portion of this project, please also provide an hourly rate that you would charge for each person materially involved in the project for anything that may be added to the scope. You are welcome to provide more than one option. A pricing range is OK if it gives the selection committee adequate visibility into ALL of the costs we may incur and how they will be determined. If you are unsure about

something go ahead and submit and simply state your assumption. Our selection committee will carefully review each submittal and contact you if we need additional information or clarity.

Thank you again for your interest in our college and this project.