



2551 Murray Avenue  
Huntingdon Valley, PA 19006  
(215) 938-0272  
[www.lmtsd.org](http://www.lmtsd.org)

## Request for Proposal

*August 2023*

### Lower Moreland Township School District Request for Proposal for Strategic Planning Services

Inquiries and proposals should be directed to:

Name: Cheryl Galdo  
Title: Director of Human Services/Public Relations  
E-mail Address: [cgaldo@lmtsd.org](mailto:cgaldo@lmtsd.org)  
Phone: 215-938-0272

## Table of contents

### General information

- A. Purpose
- B. Who may respond
- C. Instructions on proposal submission
  - 1. Closing submission date
  - 2. Inquiries
  - 3. Conditions of proposal
  - 4. Instructions to prospective contractors
  - 5. Electronic copy submissions
  - 6. Right to reject
  - 7. Presentations
  - 8. Notification of award
- D. Description of entity and scope of work requested

### Specification schedule

- A. Pricing
- B. Payment
- C. Confidentiality

### Technical qualifications

- A. Understanding our needs
- B. Understanding the scope of work
- C. Understanding our industry
- D. Engagement team
- E. Organization, size and structure
- F. Approach to the engagement

### Proposal evaluation

- A. Submission of proposals
- B. Nonresponsive proposals
- C. Proposal evaluation
- D. Review process
- E. RFP schedule

### Appendix

- A. Sample proposal evaluation

## General information

### A. Purpose

This request for proposal (RFP) is to seek proposals from qualified consultants for the purpose of obtaining information and firm pricing to conduct a far-reaching and inclusive process to inform and collaboratively create Lower Moreland Township School District's 2024-2029 strategic plan.

The plan will guide the District's operations and decision making for the period of July 1, 2024 through June 30, 2029. It will define the District's role in the community, guide the organization's leadership, and establish a framework for setting strategic priorities and operational goals while creating measurable and achievable service plans and timelines. The purpose of the strategic plan is to position the District to continue to be a high-performing school district that meets the educational needs of all learners.

### B. Who may respond

Only qualified individuals with experience working with educational institutions may respond to this RFP.

### C. Instructions on proposal submission

1. **Closing submission date:** Proposals must be submitted no later than 5:00 p.m. (Eastern time) on September 30, 2023.
2. **Inquiries:** Inquiries concerning this RFP should be directed to Cheryl Galdo, Director of Human Resources/Public Relations at [cgaldo@lmtsd.org](mailto:cgaldo@lmtsd.org).
3. **Conditions of proposal:** All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the proposer and will not be reimbursed by Lower Moreland Township School District.
4. **Electronic copy submissions:** Proposals should be submitted electronically to the following email address: [cgaldo@lmtsd.org](mailto:cgaldo@lmtsd.org) by the closing submission date noted above. It is the responsibility of the proposer to ensure that the proposal is received by the District by the date and time specified above. Late proposals will not be considered.
5. **Right to reject:** Lower Moreland Township School District reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based on the factors described in this RFP.
6. **Presentations:** At the discretion of Lower Moreland Township School District, proposers submitting proposals may be requested to make virtual presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected proposers. Not all proposers submitting a proposal will be asked to participate in oral presentations.
7. **Notification of award:**
  - a. It is expected that a decision about selection of the successful proposer will be made after one or more proposers is invited to a meeting of the Board of School Directors of the Lower Moreland Township School District

## D. Description of entity

The Lower Moreland Township School District is a public school district in Montgomery County, Pennsylvania. The school district serves the Township of Lower Moreland, a Philadelphia suburb of approximately 12,000 people. It is a high-performing district with a great deal of parental involvement.

The student body at the schools served by Lower Moreland Township School District is 74.3% White, 1.5% Black, 20.4% Asian or Asian/Pacific Islander, 2.8% Hispanic/Latino, 0% American Indian or Alaska Native, and 0.2% Native Hawaiian or other Pacific Islander. In addition, 0.7% of students are two or more races, and 0% have not specified their race or ethnicity.

Also, 50% of students are female, and 50% of students are male. At schools in Lower Moreland Township School District, 8.7% of students are eligible to participate in the federal free and reduced price meal program and 7.8% of students are English language learners. (Information gathered from the Pennsylvania Department of Education website.)

## Specification schedule

### A. Pricing

The proposer's proposed price for services should include a breakdown of costs and a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated, including travel expenses.

### B. Payment

Payment terms will be agreed upon with the proposer.

### C. Confidentiality

The proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to the District, the proposer agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the Proposer's possession, to those employees on the Proposer's staff who must have the information on a "need to know" basis.

The Proposer agrees to immediately notify, in writing, the District's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

## Technical qualifications

The proposer, in its proposal, shall, as a minimum, include the following:

### A. Understanding our needs

The proposer should describe the current challenges and opportunities specific to our organization. Describe how your firm is best suited to assist our organization in facing those challenges and opportunities moving forward.

## B. Understanding the scope of work

The proposer should clearly describe the scope of work to be performed in alignment with this RFP. The successful proposer in this RFP process will accomplish the following, in addition to other inclusions identified throughout the RFP. These include:

- Develop a comprehensive timeline. This project should be completed no later than June 30, 2024.
- Facilitate a strategic planning process using a methodology acceptable for similar organizations to the District.
- Perform an analysis of the internal and external challenges affecting the District and the District's areas of strength and weakness.
- Engage internal and external stakeholders to gather critical input for the strategic planning process.
- Prepare the board, leadership, key staff and others to engage in strategic decision making around goals.
- Develop strategic priorities (three+ year goals), strategies (one-year goals), Key Performance Indicators, 90-day accomplishments, and action plans that align with our mission, vision and values.
- Reflect the needs, voices and interests of a changing and diverse community.
- Include a process for the District to annually review and evaluate goals and develop new strategies based on the evaluation.
- Establish a method for evaluating progress and reporting on outcomes.

## C. Understanding our district

The proposer should describe its understanding of our district by providing specific industry knowledge and expertise.

1. Prior experience working with similar organizations on similar projects.
2. Prior experience providing additional services to organizations similar to the District.

## D. Engagement team

The proposer should briefly describe the qualifications of staff to be assigned to the engagement. Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members.

## E. Organization, size and structure

The proposer should describe its organization, size (in relation to work to be performed) and structure. Description should include:

1. Size of the proposer, including number of employees.
2. Industry specialization.

## F. Approach to the engagement

The proposer should describe its approach to the work to be performed.

## Proposal evaluation

### A. Submission of proposals

Proposals should be submitted to Cheryl Galdo, Director of Human Resources/Public Relations, electronically at [cgaldo@lmtsd.org](mailto:cgaldo@lmtsd.org) by the date provided.

### B. Nonresponsive proposals

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received in a timely manner in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers that the proposed undertaking would comply with requested work.

### C. Proposal evaluation

Evaluation of each proposal will be scored on the following six factors:

- Understanding our needs
- Understanding public education
- Organization size and structure of proposer's firm
- Qualifications of proposer's project team
- Proposer's approach to the engagement
- Price

See appendix for additional information.

### D. Review process

The District intends to select the proposal that is most advantageous to itself. The responses to this RFP will be evaluated by the District's Administration and Board of School Directors.

The District may, at its discretion, request presentations by or meetings with any, all or none of the proposers to clarify or negotiate modifications to the proposers' proposals.

However, Lower Moreland Township School District reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the proposer can propose.

Lower Moreland Township School District contemplates award of the contract to the responsible proposer with the highest total points.

### E. RFP schedule

August 30, 2023	RFP issued
September 30, 2023	Deadline for receipt of proposals
October 2, 2023–October 16, 2023	Evaluation of proposals begins
October 17, 2023	Final decision is made

## Appendix

### A. Proposal Evaluation

Using the attached form, members who are part of the proposal evaluation process should score proposals individually. Evaluation of each proposal will be scored on the below six factors.

Total points will be calculated from each reviewer, providing a total point value for each responding proposer. The proposer, meeting all of the outlined criteria, that also accumulates the highest total point value may be awarded the contract.

Proposal evaluation		
	Point range	Points earned
<b>Understanding our needs</b> Understanding our current challenges and opportunities Firm's approach to addressing our challenges	<b>0-5</b>	
<b>Understanding our industry</b> Prior experience working with similar organizations on similar projects Prior experience providing additional services to organizations similar to the District	<b>0-20</b>	
<b>Organization, size and structure of proposer's firm</b> Adequate size of the firm Industry specialization	<b>0-5</b>	
<b>Qualifications of staff to be assigned to the project</b> Consulting team makeup Prior experience of the individual consulting team members	<b>0-20</b>	
<b>Proposer's approach to the engagement</b> Comprehensive methodology Engages a variety of stakeholder groups Collaborates with key leadership to achieve the desired outcomes Delivers clear outcomes Realistic timetable	<b>0-30</b>	
<b>Price</b>	<b>0-20</b>	
<b>Total points</b>	<b>0-100</b>	