

Request for Proposal (RFP): Strategic Planning Consultant for ETBHN

I. Introduction and Purpose

East Texas Behavioral Healthcare Network (ETBHN) is seeking proposals from qualified consultants or firms to facilitate the development of a comprehensive **3-year Strategic Plan**. The selected consultant will partner with ETBHN's Regional Oversight Committee (ROC), management, and select stakeholders to deliver a focused, actionable, and measurable plan that will guide our organization through a period of change and uncertainty.

II. Organizational Background

ETBHN is a network of eleven Community Mental Health and Developmental Disability Service Centers established in 1998 as a response to challenges in delivering care effectively and efficiently. www.etbhn.org

III. Project Objectives

The strategic planning process shall:

- **Establish clear objectives and early priorities** for the next 1–3 years.
- **Identify barriers** to success and strategies to overcome them.
- **Develop practical, focused outcomes** with measurable Key Performance Indicators (KPIs).
- **Strengthen collaboration** between board and management.
- **Enhance technology strategy** and resource allocation.
- **Conduct a thorough scan** of internal and external environments, including competitive, funding, and regulatory factors.
- **Engage workforce and key stakeholders** meaningfully.
- **Produce a clear, actionable plan** with structured reporting and annual review mechanisms.

IV. Scope of Work

The consultant will be expected to:

- Conduct pre-engagement meetings with ETBHN leadership and the strategic planning committee.

- Review relevant organizational documents (e.g., past strategic plans, financials, branding materials).
- Design and facilitate inclusive planning sessions and retreats for board, management, and select staff.
- Gather and synthesize input from internal and limited external stakeholders (e.g., funders, partners, families, donors).
- Lead a comprehensive strategic inquiry and planning process that addresses the following critical questions:
 - o Mission, Vision, and Values: Review our mission, vision, and values, how well do they reflect our work today?
 - o Program Alignment and Community Center Need: What work aligns best with our mission, expertise, and capacity? What programmatic areas have the greatest community need? Where is there likely to be funding to support additional programmatic growth?
 - o Growth Strategy: Should growth be a strategic goal, if so, should it be accomplished through expanding existing programs in current areas, expanding to new geographic areas, acquiring existing programs or organizations, and/or launching new programs?
 - o Programmatic and Financial Growth: How does programmatic growth intertwine with financial growth? Which programs are more or less profitable? Which have greater likelihood of financial support from states, federal government, foundations, or major donors?
 - o Brand Strategy: What is our brand? How do we balance organizational brand vs. program brands?
 - o Organizational and Leadership Structure: What organizational and leadership structure is needed for the next chapter?
- Lead a comprehensive environmental scan (including SWOT or similar analysis) focusing on:
 - o Program and funding uncertainty
 - o Reputational risk
 - o Political, legal, and economic conditions

- o Technology and facility costs
- Develop a draft strategic plan with clear, measurable goals, timelines, and accountability structures.
- Facilitate feedback and revisions with ETBHN leadership.
- Present the final strategic plan to the board and provide a roadmap for implementation, annual review, and progress reporting.
- Support annual monitoring of progress towards goals and reassessment of priorities.

V. Project Timeline

- **Preferred Start:** January 2026
- **Completion:** April 2026 (to align with budget planning and resource allocation)
- **Key Milestones:** To be proposed by the consultant, including major meetings, draft and final plan delivery, and board presentations.

VI. Proposal Requirements

Proposals must include:

- **Firm/Consultant Information:**
 - o Name, address, contact person, phone, and email
- **Qualifications:**
 - o Relevant experience in strategic planning for nonprofits, especially in human services, justice, or similar sectors
 - o Experience with board and management facilitation, environmental scanning, and workforce engagement
 - o Three references and examples of similar completed projects
- **Approach and Work Plan:**
 - o Detailed methodology and timeline for the strategic planning process
 - o Engagement strategies for board, staff, and stakeholders
 - o Tools and frameworks for environmental scan and analysis
- **Deliverables:**

- o Description of expected outputs (e.g., draft and final plan, presentations, implementation roadmap)
- **Cost Proposal:**
 - o Detailed fee structure, including travel and other anticipated expenses
- **Additional Information:**
 - o Any potential conflicts of interest
 - o Availability and capacity to meet the project timeline

VII. Evaluation Criteria

Proposals will be evaluated based on:

- Demonstrated experience and qualifications
- Quality and clarity of proposed approach
- Understanding of ETBHN's needs and context
- Cost-effectiveness
- References and past performance

VIII. Submission Instructions

- **Deadline: December 1, 2025 by 10 a.m.**
- **Submission:** Proposals must be submitted electronically to Rachel Coleman, rachel.coleman@etbhn.org with the subject line: "ETBHN Strategic Planning RFP Submission."
- **Questions:** Direct all inquiries to Rachel Coleman, rachel.coleman@etbhn.org

IX. Additional Notes

- ETBHN strongly supports the use of an **external facilitator** for objectivity, focus, and inclusivity.
- ETBHN reserves the right to reject any or all proposals and to negotiate terms with the selected consultant.

We look forward to reviewing your proposal and partnering to chart a bold, actionable course for ETBHN's future.