



## **Request for Proposal - Senior Services Strategic Planning Consultant Questions & Answers - Updated 05/14/2025**

**1. Do you have a preferred completion date for the Senior Services Strategic Plan project?**

The project is estimated to kick-off July 28 and we anticipate 9-12 months for completion.

**2. Is there a budget amount that you have in mind?**

We are budgeting \$100-\$150k for this project.

**3. The proposal requirements specify to provide "Proof of financial solvency (audit or 990)". We are a private, for-profit company that does not require an annual audit at this point in time, and do not have audited financial statements. However, we can provide our profit and loss statements for the past 3 years. Would this satisfy this requirement?**

*Pending response from legal.*

**4. The requirements specify "Proposals must be no more than seven (7) single-sided pages" and include the firm overview, narrative information, and project plan as well as budget and cost narrative; three (3) references from comparable projects; proof of financial solvency (audit or 990); and proof of liability insurance (\$1M per occurrence / \$2M aggregate). Can you confirm what specific items are included in the seven-page limit (i.e., are the references, proof of financial solvency, and proof of liability insurance excluded from the limit)?**

The seven-page limit does not include references, proof of financial solvency, or proof of liability insurance.

**5. Will non-local consultants be considered for this engagement, or is there a preference for local consultants?**

Yes, non-local consultants will be considered. While knowledge of the region is helpful, Lake County welcomes proposals from qualified consultants regardless of geographic location. Demonstrated experience in similar projects and a feasible engagement plan are the priority. Candidates will need to demonstrate their understanding of the senior services landscape and local context.

**6. Can this engagement (both working with the Lake County Board of Commissioners/Senior Citizens Advisory Panel as well stakeholder engagement) be conducted as a blend of virtual and in-person time? Or is there a preference for how this is conducted?**

Yes, a hybrid model of virtual and in-person engagement is acceptable. However, some in-person presence may be expected for key meetings, focus groups, or presentations.

- 7. Is there an established preference for how stakeholder engagement is completed (i.e., focus group, interview, survey, etc.)?**

There is no strict preference; the consultant is encouraged to propose a stakeholder engagement strategy that is inclusive, effective, and aligned with the goals of the project.

- 8. Will the Lake County Board of Commissioners/Senior Citizens Advisor Panel provide the list and contact information for the desired stakeholders, or will the consultant be expected to develop the stakeholders to be contacted?**

A preliminary list of stakeholders will be provided by Lake County. The consultant may supplement this list based on gaps or additional key informants identified during the engagement process. The Senior Services Manager will be working with the consultant and can provide guidance in this area.

- 9. Is there a desired format for conducting strategic planning with leadership (i.e., one-day retreat, multiple planning sessions spread out over a week, etc.)?**

There is flexibility in the format. Consultants should propose an approach that encourages productive input from leadership and aligns with their availability. Based on previous projects, short in-person sessions are preferable.

- 10. What is the desired strategic planning period length for this engagement (3-year period, 2026-2029, etc.)?**

A three-to-five-year strategic planning period is desired. We anticipate the project will conclude within 9 - 12 months of the start date, positioning the launch of the strategic plan between May and August 2026.

- 11. Is there an event or specific instance that led to the desire for this strategic plan to be completed right now?**

It has been 10 years since Lake County last conducted a strategic planning process for senior services. Given the demographic shifts, increasing service demands, and relatively flat revenue streams, the County recognizes the urgent need for a refreshed, data-informed, and coordinated approach to service delivery. This initiative is part of a broader effort to improve system efficiency, address service gaps, and guide future investments with greater strategic focus. Engaging a third-party consultant will provide objective analysis and support the development of an unbiased, forward-looking plan.

- 12. Can an organization chart/directory be provided for the Lake County Board of Commissioners and Senior Citizens Advisory Panel?**

Yes, Lake County can provide an organizational chart and contact information for the Board of Commissioners and the Senior Citizens Advisory Panel to facilitate planning and coordination. The Senior Services manager will help to initiate and coordinate any necessary meetings or stakeholder groups.