



Request for Proposal - Senior Services Strategic Planning Consultant Questions & Answers - Updated 05/19/2025 at 11:30AM

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?

Yes, three years of profit and loss statements would be acceptable.

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.

13. Does Lake County have a written policy on indirect costs?

We do not have a policy, but we follow the state guidelines and work with Maximus to gather the information needed.

14. What does success look like for this project?

Success for this project includes the development of a clear, actionable, and data-informed strategic plan that provides a roadmap for meeting the evolving needs of Lake County's older adult population over a three-to-five-year period. The plan should include recommendations that support more coordinated, equitable, and efficient service delivery.

We are also looking to evaluate and evolve our current funding model. Historically, levy funds have been distributed based on fixed percentages across providers. We aim to explore alternative funding approaches that are tied to measurable results and community impact.

Ultimately, this project will help guide difficult but necessary decisions about resource allocation in the face of increasing service demands and flat or limited revenue growth. A successful engagement will provide us with the tools, data, and strategic clarity to make those decisions responsibly and transparently.

15. Does the project represent a continuation of a past or current effort or is this a new initiative? If you have used a similar process in the past, what parts do you wish to retain, and which parts do you wish to improve or discard?

This project builds on a strategic planning process completed in 2010, which successfully guided the creation of new programs and led to increased accountability among providers. Following that effort, Lake County voters approved an increase in levy funds, reflecting strong community support for senior services.

However, we recognize that the landscape has changed significantly since then. This new initiative is intended to go deeper—examining not just services and programs, but also funding distribution models, system capacity, and provider performance. We want to move beyond the perception that the County is the sole subject matter expert and instead engage an external consultant who can offer objective analysis and bring fresh insight.

This plan should help us develop a more equitable, outcome-based funding strategy and strengthen our ability to hold providers accountable through clearly defined expectations and performance measures. Our goal is to create a stronger, more integrated system that is responsive to the growing and diverse needs of older adults in Lake County.

16. Do you have an incumbent who provides similar services to those described in the RFP? If yes, what advantage, if any, would such a vendor have in competing for the current project? What was most and least useful about the experiences?

There is no incumbent currently providing services of this nature. The County has worked with consultants in the past on related but more limited projects. Any prior experience working in Lake County may offer a contextual advantage, but all proposals will be evaluated competitively based on qualifications, approach, and value.

17. What is your not to exceed budget or budget range or how much have you spent on similar work in the past? Will your budget cover travel expenses for in-person interviews and/or other preferred meetings?

See Question 2. Previous similar efforts have ranged between \$22,000 and \$90,000. Proposals should include all costs, including travel and any anticipated expenses. In-person meetings are encouraged at key points and should be included in your proposed budget.

18. Do you have a preference for local consultants, or any other preferences (certifications, etc.)?

See Question 5. No specific certifications are required, though experience with aging services, strategic planning, and stakeholder engagement is strongly preferred.

19. Why are you choosing to outsource this project rather than staffing it internally?

Given the complexity and scope of the work—and the need for objectivity—we believe this project is best led by a qualified external consultant. A third-party perspective will provide a neutral, expert lens and facilitate more candid input from stakeholders.

20. What are your insurance requirements for this work?

Per the RFP, we require proof of liability insurance with limits of at least \$1million per occurrence and \$2 million in the aggregate.

21. Will answers to questions from all potential vendors be shared among them?

Yes, in the interest of transparency and fairness, all responses to submitted questions will be posted publicly where the RFP is listed. <https://www.lakecountyohio.gov/commissioners-office/legal-notices-to-bidders/>

22. Will we be able to learn who the other bidders are? Is there a planholder list?

We do not maintain a public planholder list, but a list of submitted proposals may be made available upon request after the submission deadline, in accordance with public records laws.

23. In our proposal, may we include references and hyperlinks to electronic resources, e.g, to web pages?

Yes, you may include hyperlinks to relevant electronic resources. However, please ensure that the proposal remains readable and accessible in PDF format, and that any critical content is also embedded directly within the proposal in case links cannot be accessed during review.

24. Is there a budget or budget range for the project?

See Question 2.

25. How many organizations received the RFP invitation?

The RFP was distributed to 18 email addresses, which included a mix of consultants, colleagues, and contacts from our professional network. Additionally, it has been shared more broadly through informal channels and stakeholder networks, so we anticipate wider visibility beyond the initial distribution list.

26. Have the organizations who did the two studies referenced in the RFP (MCS and Center for Community Solutions) been invited to submit proposals?

Yes, both organizations received the RFP as part of our distribution. However, it is our understanding that MCS is no longer conducting consulting work. Nonetheless, this remains an open and competitive process, and all qualified respondents are encouraged to apply.

27. Can links to websites be used (e.g., firm information) and not be counted toward the seven-page limit?

Yes, hyperlinks to additional firm or project information may be included and will not count toward the seven-page narrative limit. However, proposals should be understandable and evaluable without needing to follow links.

28. Do the last two items (990/Audit and Certificate of Insurance) count toward the 7-page requirement?

See Question 4.

29. Will there be an internal project manager/point of contact for the project once it kicks off?

Yes, the Senior Services Manager will serve as the primary point of contact for coordination and communication throughout the engagement.

30. Can you clarify the expectations related to this point in the RFP regarding stakeholder engagement?

Stakeholder engagement is a critical component of this project. The listed groups are expected to actively inform the assessment and strategic planning process.

31. Do you see these groups having input into how the RFP scope is carried out?

These groups should provide meaningful input that helps shape the consultant's analysis and recommendations. While the overall scope is defined in the RFP, the consultant should remain

responsive to emerging themes, concerns, or gaps identified through stakeholder engagement.

32. Is the expectation that more primary research will be conducted for these groups? Or, is the expectation more about providing regular updates and addressing questions along the way?

The expectation is that primary research will be conducted with these groups to gather firsthand input. This includes capturing diverse perspectives and using them to inform the consultant's findings and strategy development.

33. Is there an expectation of regular engagement (e.g., report-outs or statuses) with the internal project contact, staff/elected officials, and the Senior Citizens Advisory Panel?

Yes, the consultant should anticipate regular check-ins with the Senior Services Manager, as well as periodic updates to County staff and leadership. The Senior Services Manager will coordinate these engagements. Additionally, the consultant will be expected to interact with the Senior Citizens Advisory Panel at key milestones—such as project kickoff, mid-point updates, and presentation of findings or draft recommendations. These sessions may involve formal presentations, Q&A, or facilitated discussions. The consultant should plan to incorporate feedback loops and remain responsive to input from both County leadership and the advisory panel throughout the process.

34. Would a strategic planning committee be formed to guide the project? If so, what would the composition and scope of that group be?

There is no specific strategic planning committee currently in place. The consultant will work primarily with the Senior Services Manager and the County Administrator, who will serve as the main points of contact and help coordinate the project. Other stakeholders may be engaged at key points in the process as needed, based on the consultant's approach and the needs of the project.

35. Are the survey instruments used in the MCS and CCS studies available to the consultant awarded the project?

Both the MCS and Center for Community Solutions studies are publicly available on our website and provide useful background for this engagement. However, the original survey instruments and data collection tools used in those studies are generally not available. The work from the MCS study was completed over 10 years ago, and we may no longer have access to the original instruments. Consultants should be prepared to develop their own tools as needed to meet the current scope of work.

36. Has there been any ongoing assessment or evaluation work done in the timeframe between the two studies referenced in the RFP? Have there been any assessments on the original MCS work to determine whether or not needs are being met? (Other than the CCS study itself?)

Yes, the County implemented many of the key recommendations from the MCS study, including the development of new programs and enhanced accountability measures for providers. While there was

no formal evaluation process specifically tied to the MCS study, its recommendations significantly shaped service delivery and funding priorities in the years that followed.

The more recent Center for Community Solutions (CCS) study, completed in 2023, was a smaller-scale needs assessment. It highlighted emerging challenges—such as a growing older adult population, increasing demand for services, and flat or limited revenue—that underscored the need for a more comprehensive, data-informed strategic plan. This current initiative is a response to that gap and aims to build on past work while moving toward a more coordinated and sustainable system.

37. Is there an existing forum for providers of senior services and if so, which agency convenes that (Lake County or other nonprofit organization?). Have the roundtables been ongoing or just a part of the study?

Yes, there are provider roundtables and workgroups that convene periodically. These are typically coordinated in partnership with local service coalitions. These groups have been used for past engagement efforts and can be leveraged as part of this project.

38. Will the consultant have access to existing data from Mon Ami and MySeniorCenter platforms?

Yes, the consultant, through the Senior Services Manager, will have access to data and reporting capabilities from both systems, subject to appropriate confidentiality and data-sharing protocols.

39. Should the consultant plan to deliver a graphically designed report and plan (i.e., provide graphic design services), or will the County handle that internally?

The consultant should include design and formatting of a final, professionally presented report and strategic plan as part of their scope. While the County may provide branding guidance, we expect the consultant to lead the visual design and packaging of the final deliverable.

40. Is there a preferred format for the budget / cost justification portion of the proposal (i.e. a table with predefined column headers, a narrative, etc.)?

There is no predefined format required for the budget section. However, a clear, itemized budget in a table format and accompanied by a brief narrative justification is preferred. The budget should clearly explain how costs were calculated and how they align with the proposed scope of work.

41. Is there a budget range or a budget ceiling for this project? Are there any statutory restrictions or maximums on project, indirect, or incidental costs?

See Question 2. While there are no specific statutory restrictions, the County reserves the right to evaluate the reasonableness of all costs, including indirect and incidental expenses. Travel and related costs should be clearly detailed and justified.

42. Is there a preferred format or frameworks that should be included for the final strategic plan and needs assessment report (e.g., logic model, theory of change, performance dashboards)?

While there is no required format, we encourage the use of frameworks that clarify strategy and impact. The final deliverables should be actionable, clear, and accessible to a range of stakeholders. We look to the consultant to determine and propose the most appropriate and effective methods and frameworks to support the goals of this project.

43. Should we plan to deliver a single combined report, or separate outputs for the needs assessment and the strategic planning framework?

A single integrated report is preferred. If the consultant believes separate documents would enhance usability or impact, that approach may also be proposed.

44. What is the anticipated role of the Senior Citizens Advisory Panel throughout the process—are they decision-makers, reviewers, or engagement participants?

The Senior Citizens Advisory Panel will serve as stakeholders and periodic reviewers. They are not decision-makers, but their input will be important at various stages of the project, including reviewing findings and providing feedback.

45. Will the County assist in identifying and recruiting residents aged 55+, caregivers, and members of vulnerable populations for interviews or focus groups?

Yes, the County will assist in identifying and reaching out to these individuals, in collaboration with levy-funded providers and community partners. The consultant should propose a stakeholder engagement strategy and work with the Senior Services Manager to execute outreach efforts.

46. What level of detail is expected in the operational and funding framework analysis? For example, is a line-item audit of fund utilization expected or a higher-level funding stream analysis?

A higher-level analysis of funding streams and service utilization is sufficient. The County does track provider expenditures and maintains oversight of how funds are used. However, we are seeking assistance in identifying inefficiencies, understanding current funding trends, recognizing service and funding gaps, and developing data-informed recommendations for improving funding strategies going forward. This includes guidance on how to better align limited resources with growing needs and to explore possible changes to future funding and service delivery models.

47. Will the selected vendor have a single point of contact within the County, and will that individual have decision-making authority?

Yes, the Senior Services Manager will serve as the primary point of contact and will coordinate internal and external engagement. While they will have day-to-day decision-making authority for the project, major decisions will involve consultation with the County Administrator and, as needed, other County leadership.

48. Are there any planned community or agency events during the project timeline where the selected vendor should present or gather feedback?

The County may coordinate provider roundtables, advisory panel meetings, or community sessions

where the consultant could present findings or collect input. Additionally, there are existing advocacy groups that meet regularly, and stakeholders are typically very accommodating to participating in roundtables or feedback sessions. There may also be community events that align with the project timeline and could serve as valuable venues for stakeholder engagement. The County also has two opportunities to reach constituents via postal mail during the project timeline, which can be leveraged to distribute surveys or share information. These engagement opportunities can be identified and coordinated in consultation with the Senior Services Manager. Flexibility and responsiveness to these opportunities will be important.