



Request for Proposal Strategic Planning Consultant

Overview

The Lake County Board of Commissioners, with the support of the Senior Citizens Advisory Panel, is seeking proposals from qualified consultants to conduct a comprehensive strategic planning and needs assessment for senior services in Lake County. The purpose is to ensure the long-term effectiveness, adaptability, equity, and sustainability of services funded by the Lake County Senior Services Levy.

The successful consultant will evaluate current services and systems, identify emerging needs, recommend improvements, and deliver a comprehensive report that guides future investments and operational planning.

Purpose & Goals

This project seeks to:

- Ensure oversight and alignment with strategic priorities in aging services. Reference previous studies, 2015 MCS Consulting-*Lake County, Ohio Senior Citizens: Today, Tomorrow, and in the Future* and 2024 Center for Community Solutions-*Statistical Profile of Older Adults in Lake County*. Both linked here: <https://www.lakecountyohio.gov/senior-services/>.
- Quickly respond to unmet needs or emergent issues among older adults.
- Provide flexibility to expand and adapt services as demographic and community needs evolve.
- Promote long-term service stability and sustainability.
- Develop a sustainable financial model for future planning.
- Streamline operations, improve coordination, and reduce redundancies across agencies.
- Integrate administrative functions and shared services to enhance cost and resource efficiency.

Scope of Work

The selected consultant will:

- Review current allocation and utilization of senior levy funds.
- Assess the effectiveness, reach, and impact of services provided by levy recipients.
- Evaluate demographic and geographic service coverage throughout Lake County.
- Identify service gaps and trends related to aging services.
- Recommend improvements to service delivery, operational frameworks, and funding structures.
- Deliver a final strategic planning report and blueprint adaptable to future needs.
- Identify national and state-level best practices for senior programming, with a focus on applicability to Lake County, Ohio.
- Evaluate and enhance the utilization of existing software platforms, Mon Ami and MySeniorCenter, to ensure they are fully leveraged for service coordination, data tracking, and performance measurement.

- Analyze MySeniorCenter data to identify service trends, potential duplication of efforts, and opportunities for optimization.

Stakeholder engagement must include:

- Senior levy-funded organizations, including Chief Elected Officials of current recipients
- Local government and social service offices
- Residents aged 55+, caregivers, and representatives of vulnerable populations

Key Questions to Address

1. How effectively are current services addressing the needs of Lake County seniors?
2. What are the projected demographic trends and emerging service needs?
3. How can levy resources be distributed equitably and inclusively to support the most vulnerable?
4. What administrative or service delivery redundancies exist, and how can they be addressed?
5. What future funding models can support sustainable growth with potentially flat revenues?
6. What new programs, partnerships, or structural changes should be explored?

Proposal Requirements

Proposals must be no more than seven (7) single-sided pages and include:

- Firm overview (name, address, website, contact person, phone number, email)
- Consultant history, team qualifications, and staffing plan
- Experience with strategic planning and needs assessments in aging or human services
- Description of unique strengths or capabilities
- Methodology for research, data collection, and stakeholder engagement
- Detailed project plan with tasks, timelines, and deliverables
- Budget and cost narrative, including any indirect or incidental costs (e.g., travel, admin)
- Description of prior work including facility/operational analyses
- Three (3) references from comparable projects
- Proof of financial solvency (audit or 990)
- Proof of liability insurance (\$1M per occurrence / \$2M aggregate)

Evaluation Criteria

Proposals will be scored (1-5 scale) based on:

- Qualifications and experience of firm and proposed staff
- Technical approach and methodology
- Project plan and ability to meet deadlines
- Understanding of the senior services landscape and local context
- Clarity and appropriateness of the budget and cost justification

The evaluation team will group criteria under three categories:

Category	Includes
Quality	Qualifications, methodology, approach, and project plan
Performance	Timeline, capacity, and understanding of needs
Price	Budget clarity, value, and indirect costs

Tentative Timeline

Milestone	Date
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Milestone	Date
RFP Release Date	05/09/2025
Deadline for Questions	05/19/2025
Responses to Questions Posted Online	05/23/2025
Proposal Submission Deadline	06/11/2025 @ 11:00 a.m.
Proposal Review Period	06/12/25 - 06/26/2025
Interviews with Finalists (if needed)	06/27/2025
Resolution Awarding Contract	07/10/2025
Project Kickoff	07/28/2025

All dates subject to change at the discretion of the Board of Commissioners.

Submission Requirements

All proposals must be submitted in a sealed envelope and marked with the offeror's name and 'CONFIDENTIAL - Senior Services Strategic Plan RFP'. Envelopes which are not sealed will not be accepted. Proposals should be mailed or hand delivered to:

Alyea Barajas

Senior Services Manager

Address: Lake County Administration Center, 105 Main Street, Suite A530, Painesville, OH 44077

Email: alyea.barajas@lakecountyohio.gov

Phone: (440) 350-2748

Deadline: Proposals due by 11:00 AM on 06/11/2025

Late submissions will not be accepted.

Submit questions via email to: alyea.barajas@lakecountyohio.gov (subject line: Senior Services Strategic Plan RFP). All questions and answers will be posted at: www.lakecountyohio.gov (click Legal Notices to Bidders).

Additional Terms & Conditions

The Board of Lake County Commissioners reserves the right to:

- Reject any proposal that fails to meet specifications or budget requirements
- Reject, in whole or in part, any proposal that is determined not to be in the best interest of the County
- Waive technicalities and accept the most advantageous proposal (not necessarily lowest cost)
- Award contracts in whole or in part, to one or multiple offerors
- Conduct clarifying discussions with offerors as needed

All proposals and supporting documentation will remain confidential until a contract is awarded in accordance with Ohio Revised Code §149.43.

The successful consultant shall not discriminate based on race, color, religion, national origin, sex, gender identity, sexual orientation, age, veteran status, disability, or other protected status.