



RFP Question Responses

Q. Is there a budget that respondents should respond within?

A. We do have a budget in mind, but we will not be sharing this figure. We ask that proposals speak to your best approach to the scope at your best price.

Q. Is Lighthouse willing to consider a 3-year strategic plan? We have found that this timeline typically aligns long-term vision with day-to-day operations.

A. No, we plan to stick with a five-year plan.

Q. When will the final Strategic Plan deliverables be due? Just looking to get a sense of your timeline for completion of the work.

A. We don't have a hard deadline but anticipate the life of the contract to be six-months to one-year.

Q. Does Lighthouse have an existing strategic plan — from before or after the 2019 merger — that this engagement would build on or replace?

A. Yes, Lighthouse is operating under a strategic plan. However, Lighthouse has grown and changed significantly since the previous plan was drafted. This document will be shared during onboarding with the selected individual/firm.

Q. What program, financial, and HR data can you provide at kickoff, versus what we should expect to gather during discovery?

A. The Lighthouse team will provide comprehensive access to organizational collateral at kick-off.

Q. Who will be our main point of contact and decision-maker for the engagement itself (beyond the RFP process)? Will Lighthouse staff be available to support engagement logistics, or should we plan to run that independently?

A. Erin Casey, Chief of Staff, will be the Lighthouse lead for the strategic planning process. The Chief of Staff can support with logistics such as booking meeting space and calendar invites, however the selected firm will be the responsible party.

Q. For the HR and facilities components, are you looking for a strategic-level assessment or a more detailed operational audit — and is a specialist already part of your plans, or should that be part of our team?

A. We are expecting a strategic level assessment. We want to be intentional about aligning our intended organizational outcomes with our resources - in this case, personnel and facilities.

Q. You mention the COA accreditation process is "emerging" — what's the anticipated timeline, and should the strategic plan actively build toward accreditation readiness, or just avoid conflicting with it?

A. We anticipate the accreditation process to conclude in Q4 of 2027. The accreditation process is separate, however, we would like the strategic plan to be aligned with and in support of accreditation.

Q. Is there a specific peer group or benchmark you're measuring against for being "an innovative leader in poverty alleviation throughout Oakland County"?

A. There are many organizations in our ecosystem and across the country that are doing great work. However, we have not directly identified an organization that we are benchmarking against.

Q. Are you open to the selected consultant using subcontractor partners to support pieces of the proposed strategic plan process?

A. Yes

Q. The RFP notes a preference/requirement for “at least one team member in Southeast Michigan.” Would Lighthouse consider a consulting team that does not currently have a team member based in Southeast Michigan but could engage a qualified local partner or subcontractor to support in-person stakeholder engagement and planning activities?

A. No. At least one core member of the team must be based in Southeast Michigan.

Q. Could you clarify the anticipated number and format of in-person planning sessions or meetings during the engagement, including whether Lighthouse anticipates the selected consultant being onsite for stakeholder engagement, Board meetings, or other activities?

A. We would like the consulting firm to suggest in their proposal, based on RFP scope and past experience, the right format and breadth of engagement. While some

stakeholder sessions could be held virtually, we would expect many of these engagements to be hosted in-person. The presentation to the Board will also be held in-person.

Q. Approximately how many programs, services, and business lines should the consultant anticipate reviewing as part of the assessment, beyond the specific areas identified in the RFP?

A. The lines of business specifically named in the RFP are those that we would like to pay close attention to in this process, however, we do want a high level review of all lines of business that would allow us to better develop our theory of change and align resources accordingly.

Q. Does Lighthouse have recent client needs assessment data, program evaluation findings, client outcome data, community needs data, or other existing research that can be used to inform the assessment, or should respondents include primary data collection to assess current and emerging client needs?

A. Yes, we have a wealth of data that will be shared with the selected firm in the onboarding process. We do however, hope to receive additional feedback from clients through stakeholder engagement that will shape the strategic plan.

Q. Approximately how many employees, departments, and distinct job descriptions should respondents anticipate including in the organizational structure, workforce capacity, and role-alignment assessment?

A. Loosely speaking, Lighthouse has seven departments and approximately 70 employees. The organization has approximately 55 job descriptions, broadly falling into the following categories:

- Executive
- Director
- Manager
- Lead
- Coordinator
- Specialist

Q. The RFP requests organizational and departmental logic models. Approximately how many departments or functional areas are expected to have individual logic models, and does Lighthouse currently have any organizational, program, or departmental logic models that can be reviewed and built upon?

A. Development of logic models is optional in the scope but could be a helpful map in directly aligning outcomes, with strategy, inputs and activities. We do not have logic models that can be built upon.

Q. Who do you envision participating on the Strategic Planning Committee? Would this include members of the executive leadership team and selected Board members, or would you like the consultant to make a recommendation regarding committee composition?

A. The committee has been assembled and includes the President & CEO, all members of the Executive Team, one Director and three members of the Board. Lighthouse employees should be engaged much more broadly throughout the stakeholder engagement process.

Q. To what level do you envision incorporating financial forecasts that reflect the strategies developed through the strategic planning process? What level of collaboration do you anticipate between Lighthouse staff and the consultant in developing these forecasts?

A. We do not anticipate including financial forecasting in this process. Rather, we would like to think about opportunities to shift to an outcomes based budget development process.

Q. Does Lighthouse have facilities available to host stakeholder listening sessions, or should we assume that external facilities would need to be arranged?

A. We do have space that can accommodate listening sessions, but also have connections with community partners that we can leverage if we would like to explore other locations.