

# **REQUEST FOR PROPOSALS:** **Strategic Planning Services**

**Issued By:**  
**Mental Health & Recovery Services Board of Lucas  
County**

**333 N. Summit Street, Suite 1401  
Toledo, OH 43604  
(419) 213-4600  
<http://www.lcmhrsbc.org/>**



**Proposal Due Date:**  
**September 26, 2025, by 5:00 p.m. Eastern Time**

# OVERVIEW

## Vision and Mission of the Mental Health & Recovery Services Board of Lucas County

*Vision: A compassionate community that embraces recovery and mental wellness.*

*Mission: To cultivate a high-quality network of resources that inspires personal recovery and promotes mental wellness for Lucas County residents.*

### **Summary:**

**The Mental Health & Recovery Services Board (MHRSB) of Lucas County invites proposals from interested parties with expertise in performing strategic planning services for the MHRSB's next three-year strategic plan.**

### **Background:**

As the behavioral health authority for Lucas County authorized by Ohio Revised Code 340.01, 340.03, and 340.33, the Mental Health & Recovery Services Board of Lucas County (MHRSB) is responsible for planning, funding, and monitoring the public system of care for individuals who are indigent, uninsured, or under-insured and suffer from mental health and/or substance use disorders. With discretion over \$32 million of public funds in State Fiscal Year (FY) 2025, MHRSB purchases services from over twenty local nonprofit organizations that collectively serve over 30,000 local youth and adults annually. The Board is comprised of 18 volunteer community members appointed by the State of Ohio and Lucas County Board of Commissioners. The work of the Board is carried out by a staff of 21 employees.

Every three years, the MHRSB engages in a process to update its strategic plan to be more agile and responsive to both current and potential future operational environments. In September of 2022, the Mental Health & Recovery Services Board (MHRSB) of Lucas County began the process of developing a three- to five-year equity-embedded strategic plan.

When the MHRSB's three (3) year 2023-2025 Strategic Plan [MHRSBLC Strategic Plan -](#) was written it was focused on five (5) Priority Areas; Organizational Development, Strengthening the Service Delivery System, Equity in Action, Technological Infrastructure, and Outreach & Engagement. The goal of the next three (3) year Strategic Planning effort will be to review the current Strategic Plan and evaluate its effectiveness concerning the Board's current operational environment.

## **RFP INFORMATION AND REQUIREMENTS**

### **Project Deliverables:**

MHRSB's Trustees are looking for a consultant that can facilitate a strategic planning process during November 2025 involving its Trustees and staff, as well as its stakeholders. Stakeholders include funded [service providers in MHRSB's network](#), individuals served by the local public behavioral health system and their families and natural supports, and system partners. The desired consultant will utilize creative and engaging strategies for gathering, analyzing, and incorporating a diverse body of feedback from MHRSB Trustees, its staff, and its stakeholders that support the overarching strategic vision.

The final deliverable will be a three-year strategic plan that will:

1. Establish an overarching strategic vision. Ideally, this will be developed through discussions with Board Trustees and Board Staff.
2. Establish strategic goals and priorities based on strategic vision.
3. Build on the work in the current Strategic Plan, specifically incorporating the Five Priority Areas.

### **Submitting Questions:**

All questions should be submitted to [sspinelli@lcmhrsb.oh.gov](mailto:sspinelli@lcmhrsb.oh.gov) by September 1, 2025. Responses will be posted on MHRSB's website. It is the responsibility of the applicant to check the MHRSB website for updates. You may not contact other MHRSB staff members directly with questions regarding this RFP. Contacting other staff directly with questions could result in disqualification of a proposal.

### **Notification of Awards:**

Notification of the awards will be made during the week of October 20, 2025, with an expectation that initial planning with the MHRSB staff lead will begin no later than October 24, 2025.

### **Proposed Timeline (may be modified at MHRSB discretion):**

August 18, 2025	RFP release date
August 18 - September 1, 2025	Q&A period
September 8, 2025	Q&A responses posted
September 26, 2025	<b>Proposals due</b>
Week of October 17, 2025	Notification of award
No later than October 24 2025	Project start (initial planning phase with MHRSB staff lead)

**No proposal will be accepted after September 26, 2025 at 5:00 p.m. Eastern Time (ET).**

## **PROPOSAL REVIEW PROCESS**

The review process will be conducted in two stages, as follows:

1. **Preliminary Proposal Review** examines the proposal to ensure it contains all requirements specified in the RFP. If it does not, it will be rejected. A proposal must meet the following mandatory conditions and requirements:
  - a. The proposal must have been received in the format indicated in the RFP by the deadline. **A proposal not received by the specified date and time will be rejected.**
  - b. As detailed in the RFP, all relevant sections must be in order, and attachments must be included and received by the deadline. The cover page of the proposal must be signed by an authorized representative of the applicant.
2. **Review Process**
  - a. All proposals meeting the requirements above will be evaluated to determine whether the proposal addresses all of the items in the RFP.
  - b. Proposal reviewers will not include applicants to this RFP or anyone else who may have any conflict of interest that would prohibit a fair and equitable review process. A standardized review tool will be used.
  - c. An interview with the top applicant(s) may be conducted.
  - d. Recommendation on preferred proposal will be given to the MHR SB Executive Director. Once an applicant is selected, notification will be sent electronically.

## **SUBMISSION CRITERIA**

### **Submission of Proposals:**

All applicants are required to respond to this RFP exactly as outlined in the sections below in order for the MHR SB to evaluate all proposals on an equal basis. All proposals should be submitted in a format that can be read in Microsoft Word or PDF, or hard copy. Margins should be 1" on all sides. The font should be either Times New Roman or Calibri, and the text size should be no less than 10-point. Responses should be in the consecutive section order as specified below (e.g. B, C1, C2, etc.), and should be 15 pages or fewer, not including the cover page and relevant attachments. All sections and documentation must be included with the proposal by the deadline, or the proposal will not be considered. Failure to adhere to these requirements may result in rejection of the proposal.

Proposals are to be delivered no later than 5:00 p.m. ET on September 26<sup>rd</sup>. No submissions or alterations of a proposal will be accepted after that time. Interested parties should submit written proposals via U.S. mail or email. No fax transmission will be accepted for review.

**Hard copies: MHR SB of Lucas County, attn: Steve Spinelli  
333 N. Summit Street, Suite 1401  
Toledo, Ohio 43604**

**Or electronic: [sspinelli@lcmhrsb.oh.gov](mailto:sspinelli@lcmhrsb.oh.gov)**

<b>PROPOSAL SECTIONS</b>
--------------------------

**A. Cover Sheet:** This must be completed in full and signed by an authorized representative at the agency. *[Template is on the last page of this RFP.]*

**B. MBE Status:**

1. Specify Minority Business Enterprise (MBE) status, if applicable.

**C. Qualifications:**

1. Provide a brief description of your experience. This can include its founding, history, and number of employees; combined years of experience for employees; service areas; and any information on awards, certifications, or other forms of recognition.
2. Provide a description of your work process.

**D. Experience and Ability to Perform this Work:**

1. Describe your organization's approach to successfully completing the tasks described in the Project Deliverables section ([page #3] of this RFP).
2. Indicate commitment to ensuring cultural competency in practices.

**E. References:**

1. Provide three references. Include the individuals' names, organizations represented, titles, phone numbers, and email addresses.

**F. Pricing:**

1. Provide a breakdown of fees for all relevant services needed to fulfill the project deliverables of this RFP.

## **ADDITIONAL INFORMATION**

### **Insurance:**

The applicant shall carry comprehensive general liability insurance, professional liability insurance and worker's compensation insurance on itself and each person employed by or under contract with it to perform services described in this RFP, with such coverage limits of \$1,000,000 per incident and \$3,000,000 annual aggregate. Further, the agency must carry automobile liability insurance for all vehicles.

### **Indemnification:**

The MHR SB shall not be responsible or liable for any damage resulting from acts of omission by the applicant, its trustees, officers, employees, agents and contractors, under any theory of imputed negligence or otherwise, and the applicant shall indemnify the MHR SB, its members, officers and employees for, defend them against and hold them harmless from any or all claims relating to acts of omission of the applicant, its trustees, officers, employees, agents, and contractors, and from any costs, attorney fees, expenses, and liabilities incurred by them in connection with such claims or in the defense of any action or proceeding brought thereon. The indemnification rights under the resulting contract with the applicant shall be in addition to any rights or remedies that may be available to the MHR SB under general legal or equitable principles in the absence of an expressed agreement, and the resulting contract shall not be construed to limit any such rights or remedies. These obligations shall continue in effect notwithstanding the termination or expiration of the resulting contract.

**Any entity who responds to this Request for Proposal must be in compliance with all federal and state civil rights, equal employment and affirmative action laws, and regulations.**

### **Addendum to Request for Proposals:**

If the MHR SB determines that it is necessary to revise or clarify any part of this RFP, an addendum will be provided via email and posted on MHR SB's website. Any clarifications will become an addendum and no other responses are considered valid. It is the responsibility of the applicant to check the MHR SB website for addendums.

### **Right to Cancel:**

MHR SB reserves the right to cancel all or any part of this RFP at any time without prior notice. MHR SB also reserves the right to modify the proposal process and timeline as deemed necessary.

### **Applicant Responsibility for Proposal Costs:**

The applicant is fully responsible for all costs associated with the development and submission of the proposal. The MHR SB assumes no contractual or financial obligation as a result of the issuance of this RFP, the preparation and submission of a proposal by an applicant, the evaluation of an accepted proposal, or the selection of approved proposals.

### **Ownership of Proposals:**

It is the practice of the MHR SB to comply with Ohio's Public Records Act (ORC: 149.43). All proposals and associated materials become the property of the MHR SB.

### **Proposal Acceptance/Rejection:**

MHR SB reserves the right to reject any or all proposals, to accept, or reject any or all of the items in the proposals, and/or to award the contract in whole or in part if it is deemed to be in the best interest of the MHR SB.

### **Applicant's Disclosure:**

Applicants must provide in their response a disclosure of any pending, current, or threatened court actions and/or claims against the applicant, parent company, or subsidiaries. This information will not necessarily be cause for rejection of the proposal; however, withholding information may be cause to reject the proposal or rescind any subsequent contract.

## APPENDIX A

### Strategic Planning Services RFP Submission Checklist

- \_\_\_\_\_ Cover sheet (signed)
- \_\_\_\_\_ Written proposal (no more than 10 pages)
- \_\_\_\_\_ References
- \_\_\_\_\_ Examples of work (optional)

## APPENDIX B

### MHR SB RFP Response: Strategic Planning Services Consultant

Applicant	Contact Person
Name of Organization:	Name:
Address:	Address:
Telephone:	Telephone:
Fax:	Email:
Website:	How did you hear about this?
Federal tax identification #:	

**Total Price:** \_\_\_\_\_

***The applicant certifies to the best of their knowledge and beliefs, the data and information in this proposal are true and correct and this document has been duly authorized by the governing body of the applicant. Further, the applicant certifies that, if the proposal is approved, the project will be conducted in accordance with the project proposal and any special condition included in the Request for Proposal. The applicant certifies that the organization does not discriminate in the provision of project services on the basis of race, color, religion, national origin, gender, gender identity, ethnicity, age, marital status, disability, pregnancy, military/veteran status, genetic information, sexual orientation, creed, human immunodeficiency virus status or other federal, state or local protected classes, and is not in violation of any local, state or federal laws, statutes, ordinances, or resolutions.***

***Authorized representative to complete the following:***

**Name and Title (print):** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_