**ALTSCHA, Inc.**

**Chesapeake Crossroads Heritage Area**

**Request for Proposals, Development of 5-Year Plan for FY2024-2028 – Revised 7/6/2022**

**Due Date: July 29, 2022**

**Project Description:** Annapolis, London Town & South County Heritage Area, Inc. (ALTSCHA, DBA Chesapeake Crossroads Heritage Area) is undertaking a Five-Year Planning Process and is seeking proposals from qualified consultants to assist us in our process. Although we aim for a plan that meets our own organization’s needs and goals, we will also utilize a template provided by our primary funder, the Maryland Heritage Areas Authority (MHAA), and incorporate newly-amended Interpretive Themes developed through a separate process (see below). A draft plan is to be completed and approved by MHAA in spring 2023. The plan will cover the period July 2023 through June 2028. This plan will complement and serve as an update to the existing ALTSCHA Management Plan (approved in 2000), Five-Year Plan from 2013-2018, FY 2023 Annual Plan, and the Boundary Amendment Proposal that was approved in April 2021, which approximately doubled our geographic area served.

1. **Project Background:** ALTSCHA seeks to update its current five-year plan and develop outcome-driven goals toserve the organization’s mission over the next 5 years with particular focus on equity, impact, and sustainability.

Annapolis London Town & South County Heritage Area, Inc. (ALTSCHA, DBA Chesapeake Crossroads Heritage Area) is one of 13 certified heritage areas in the State of Maryland. Maryland Heritage Areas are locally designated, locally managed regions where public and private partners make commitments to preserving historical, cultural and natural resources for sustainable economic development through heritage tourism. We are a partnership among the Maryland Heritage Areas Authority (MHAA), Anne Arundel County, The City of Annapolis, the Town of Highland Beach, and heritage-related nonprofit organizations and businesses that encourages economic development through resource enhancement and heritage tourism. Certified by the State of Maryland in 2001, the Heritage Area incorporated as a nonprofit organization in 2003, and its boundary was expanded in April 2021.

A Management Plan for ALTSCHA was adopted in 2000 shortly before the heritage area was certified. While much of that plan has been accomplished, it expresses themes and priorities of the heritage area in terms that are now seen to be outmoded, with the “voice” of these themes described as not sufficiently inclusive.

In 2013, all certified heritage areas in Maryland were required to prepare a Five-Year Action Plan using an MHAA-provided template (the ALTSCHA plan was, to a great extent, a reiteration of a Strategic Plan product completed in 2011, in a slightly different form.) Each year, the heritage area management entities are required by MHAA to submit an Annual Plan with their application for Management Grant funding. The 2013-2018 Five-Year Plan is still in effect, with the Annual Plans updating it each year, until MHAA approves a superseding Plan.

Read the ALTSCHA Five-Year Plan and recent Annual Plans here: <https://chesapeakecrossroads.org/partners/resources/>

ALTSCHA delayed creation of a new Five-Year Plan while MHAA undertook a comprehensive Impact study. That study includes recommendations for metrics that certified heritage areas should be tracking in the future, which are now identified. The plan to be developed now will not center exclusively on these metrics but should consider them and pave the way for gathering this data annually.

MHAA requires each Certified Heritage Area to operate with clearly-identified Interpretive Themes. As noted above, the themes which ALTSCHA identified in 2000 should have an update to be more inclusive. ALTSCHA will be conducting the process to amend these themes in parallel to the Five-Year planning process; the new Interpretive Themes will be incorporated into the final Five-Year Plan document.

During ALTSCHA’s Rebranding sessions with stakeholders, we received important feedback about our value, relevance, and profile in the local community. Read more about the insights derived from that process here: <https://chesapeakecrossroads.org/rebranding-process-results-in-new-marketing-insights/>

Beginning in October 2022, ALTSCHA utilized its quarterly Coordinating Council meetings to gather feedback and ideas to be incorporated into the five-year-planning process. Recordings and/or notes from these meetings will be helpful as background.

More background information and plans may be found at these links:

[www.chesapeakecrossroads.org](http://www.chesapeakecrossroads.org) (Website includes stakeholder resources as well as information for visitors)

<https://chesapeakecrossroads.org/partners/resources/> (Planning Documents including Management Plan)

<https://chesapeakecrossroads.org/four-rivers-heritage-area-economic-impact-estimated-at-244-8-million/> (Includes Economic Impact Study link)

<https://mht.maryland.gov/documents/PDF/MHAA/MHAA_StrategicPlan.pdf> (State Plan expired in 2020)

**2. Services and Scope of Work:** The contractor will (at a minimum):

* 1. -- Orientation of consultant -- Review existing documents, including Mission Statement, Vision Statement, Five-Year Plan from 2013-2018, Boundary Amendment, Coordinating Council meeting materials, and marketing insights from Rebranding Process.
	2. -- Consultant and ALTSCHA Board to confer to develop ALTSCHA profile and priorities, to ensure accuracy and two-way communication.
	3. -- Consultant and ALTSCHA work together to plan stakeholder meetings and next steps.
	4. -- Engage key stakeholders (identified by ALTSCHA) in one or more listening sessions (in-person or virtual depending on ability to travel & meet) in a SWOT analysis, focused on understanding the wide-ranging resources and opportunities for heritage tourism (and related preservation/conservation and product development).
	5. -- Conduct interviews or small-group sessions with key stakeholders (identified by ALTSCHA) to include elected officials, Destination Marketing Organization (DMO) staff, and representatives of selected partner resources (such as parks, nonprofits, municipalities) to glean more insight as to opportunities for ALTSCHA in the communities it serves.

2.6 -- Facilitate a half-day Board and Staff planning retreat.

2.7 -- Draft revised Mission and Vision Statements, Impact Statement, and Core Values, and identify the Top Five Issues (opportunities or threats) for ALTSCHA in the next 5 years.

2.8 -- Develop the list of Goals for ALTSCHA for the FY2024-2028 Plan.

2.9 -- For each Goal, identify Objectives, and for each Objective, identify Action Items and Deliverables/Measurables (Outcomes), and Reason for Priority (Impacts).

2.10 -- ALTSCHA will circulate interim drafts and provide feedback to the consultant who will be responsible to obtain the additional requested information or clarification for inclusion in subsequent drafts.

2.11 -- Following approval of the final documents, the consultant shall provide ALTSCHA with a final digital copy of all documents (including text, maps, diagrams, spreadsheets, charts, budgets, etc.). Once work products are finalized and submitted to ALTSCHA in digital format, ALTSCHA will conduct any printing of the documents and the subsequent distribution thereof. Costs of such printing and distribution are not the responsibility of the consultant.

2.12 -- The final document will include:

• Executive Summary

• Narrative report of the activities and findings (with appendices as appropriate)

• Recommended Mission Statement, Vision Statement, Impact Statement and Core Values

• A Five-Year Plan matrix outlining each Goal, Objective, Action Items, Outcomes, and Impacts (Template provided by MHAA)

**3. Proposal Format** -- All submitted proposals shall be complete and prepared in a straightforward and concise manner, including:

3.1 -- A letter of interest and explanation of consultant capabilities in successfully preparing the work detailed in 2.0 Services and Scope of Work.

3.2 -- Resume of principals and their demonstrated expertise in strategic and organizational planning for cultural heritage organizations.

3.3 -- References, examples of similar projects, and qualifying experience.

3.4 -- Work plan outline and proposed timeline. The timeline should begin no sooner than August 17, 2022 and conclude no later than February 28, 2023, with final approval of all documents by the ALTSCHA Board expected before March 15, 2023. This timing coincides with constraints of the MHAA grants that we anticipate will fund this project.

3.5 -- A proposed budget and detailed cost of services. ALTSCHA would like to see proposals that provide an overall project budget as well as component pricing breakdown.

4**. Proposal Submission**

4.1 -- Due Date: Proposals submitted against this Request for Proposals MUST be submitted as a PDF electronically to [heritage\_area@aacounty.org](file:///C%3A%5CUsers%5Ccarol%5CDesktop%5CNew%20Five-Year%20Plan%5Cheritage_area%40aacounty.org) and be received by 11:59 PM E.S.T., on July 29, 2022. Notification of final selection and award of the project will occur by email on or about August 17, 2022.

4.2 -- Responses to this RFP will be evaluated by a Subcommittee of the Board. These will be evaluated on:

a. Responsiveness of the written proposal to the purpose and scope of the project.

b. Demonstrated knowledge, skills, and experience in conducting similar planning projects.

c. Methodology and timeline for carrying out tasks in the scope of work.

d. The cost to complete the process.

e. Ability to meet deadlines and operate within budget.

f. Positive experience and success in strategic/5-year planning.

4.3 -- Any questions regarding this RFP are to be directed to (please NO calls) heritage\_area@aacounty.org with the subject line “Planning RFP.”

**Inquiries:** Inquiries must be made via email. Please address all inquiries to [heritage\_area@aacounty.org](http://heritage_area@aacounty.org).

**Fees:** The resulting contract for 5-Year Planning services will define a not-to-exceed fee for services. Thisfee proposal must therefore include services, costs, and all incidentals including printing and travel costs, facilitation of meetings, surveying, and a half-day session with ALTSCHA Board and staff. This session will be conducted in late Summer 2022.

**Contract**: The contract for service will include and reference the accepted proposal.

**Statement of Intent:** ALTSCHA reserves the right to reject any or all responses to this Request for Proposals.ALTSCHA will not reimburse costs of preparing the consultant proposals. ALTSCHA reserves the right to ask for clarification on the proposal if the need arises.