

**MOUNT VERNON CITY SCHOOL DISTRICT**  
165 North Columbus Avenue  
Mount Vernon, New York 10553

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**REQUEST FOR PROPOSALS**

**CONSULTANT SERVICES FOR STRATEGIC PLANNING  
2025-2026**

The Mount Vernon City School District hereby invites sealed proposals for qualified and experienced individuals or firms to provide consultation services to the School District in connection with the development of a District-wide comprehensive strategic plan. Pursuant to this Request for Proposal, the Board of Education intends to select a qualified individual or firm to perform the services for the Mount Vernon City School District. (the "School District").

***Scope of Engagement:***

The School District requires experienced individuals or firms to provide professional consultation services to the School District to assist in the development of a comprehensive, District-wide strategic plan. The successful proposer will offer consultation services and collaborate with the District and stakeholders in the creation of a new District mission statement, long-range vision and plan for the future of the School District. The successful proposer will be tasked with developing a strategic plan document that incorporates the new vision statement, mission statement, core values, strategic goals, objectives, cost-effective strategies, and performance indicators with a 5-year outlook.

The successful proposer will conduct an assessment of the current state of the District, including strengths, weaknesses, opportunities, and potential risks. The successful proposer, through a variety of strategies, including public forums, surveys, and data and achievement analysis, will assist the District in: (1) the identification of areas in need of reform; (2) development of goals; and (3) creation/selection of methods and strategies to achieve goals and effect improvement in identified areas.

The School District seeks a multi-pronged approach to the provision of the consultation services required herein including:

- Planning and conducting interviews;
- Development and preparation of targeted surveys;
- Planning and conducting public forums, identifying and utilizing other research tools to gather information about the current state of the District, its needs and desires, and to identify potential goals and initiatives;
- Facilitating stakeholder engagement sessions with parents, students, teachers, administrators, board members, and community members to gather input and feedback; and
- Analyzing data and information collected during the assessment and stakeholder engagement process.

The successful proposer will:

- support the preparation of a mission and vision statement for the District and roadmap for the future;
- develop a strategic plan which incorporates the District's mission, research based results, guiding principles, goals and objectives;
- develop a transition and implementation plan;
- provide support and guidance to the District during the implementation phase, including monitoring progress with measurable key performance-based indicators/metrics, evaluating outcomes, and making adjustments to support our mission and vision as needed or requested;
- address and incorporate New York Inspires, the New York State Department of Education's roadmap behind the initiative to reimagine graduation in New York, and reflecting the four key transformations: (i) Portrait of a Graduate: defining the knowledge, skills, and dispositions every student needs to embody upon graduation from high school; (ii) redefining credits; (iii) phasing out of diploma assessments; and (iv) one diploma for all
  - include robust professional development, stakeholder engagement, and clear communication to support schools and families through the transition consistent with approvals by the New York State Board of Regents.

The successful proposer will work closely with District leadership to prioritize initiatives, establish timelines, and allocate resources. The successful proposer will assist the School District in communicating the work of the strategic planning committee and subcommittees and the outcomes of their work.

Each proposer should include a summary of its formal work plan outlining each step of the engagement, the work that must be performed by the consultant as well as the work to be performed by the District. This work plan should include a timeline of tasks to be performed as well as the person(s) responsible for such tasks. At the start of the engagement, the successful proposer shall meet with the District to review and discuss the work scope, plan and timeline. As the engagement progresses, the successful proposer will be required to provide regular updates to the Board of Education and the District administration at intervals determined by the District.

The successful proposer shall provide a written needs assessment, methodology/dissemination for the strategic planning; assessment of representative stakeholders' input and perspectives; preliminary report with recommendations; executive summary; final report, multi-year vision and strategic plan. The successful proposer shall provide a detailed report to the Board of Education and the Superintendent of Schools upon completion of the engagement with all findings and recommendations. All work created as a result of this engagement as well as all documentation and information provided by the School District shall be and remain the property of the School District.

***Term of Engagement:***

The term of this engagement shall commence upon award through June 30, 2026. The District reserves the right to renew the resultant contract for an additional one (1) year term upon approval of the Board of Education. The District reserves the right to terminate the contract for

any reason upon thirty (30) days written notice to the successful proposer(s). No contract becomes binding until the necessary funds have been approved. The successful Proposer(s) will execute a contract with the District in substantial conformance with this RFP and the successful proposal.

***Qualifications:***

Proposers are required to be licensed and qualified to perform the services set forth herein. All individuals performing services for the School District shall be licensed under the laws of the State of New York, inclusive of the State Education Department licensing requirements, as applicable. Proposers shall certify that all such individuals possess documentation evidencing such license qualifications as required by Federal, State or local statutes, rules, regulations and orders. Each proposer submitting a proposal shall:

- Provide evidence of the individual or firm's credentials and qualifications in the area of strategic planning consultation.
- Provide evidence of the individual or firm's license to conduct business in the State of New York.
- Describe the individual's or firm's experience and expertise focusing on strategic planning and implementation provided for school districts or related entities. Firms should place particular emphasis on their experience with public school districts or government organizations similar to the District in size and scope.
- Provide the names and telephone numbers of three client contacts who would serve as references.
- State the name(s) of the officer(s) and associate(s) in the firm. Resumés of key personnel assigned to perform the services should be included in the proposal as an appendix or attachment.
- State the names and credentials of all principals, employees or independent contractors that might be assigned to the School District and provide their resumés.
- Describe recent experience similar to the type of services requested in this RFP.
- Provide any other information that might be beneficial to the School District.

**Financial Statement of the Organization:** Proposers will submit the most recent financial statement for the company or firm. The District reserves the right to use third party companies to verify financial information provided. In addition, the District may investigate, as it deems necessary, to determine the ability of the Proposer to provide the services requested herein. The Proposer shall furnish to the District within five (5) days of a request, all such information and data for this purpose as may be requested. The District reserves the right to reject any Proposal if the information submitted by, or investigation of, such Proposer fails to satisfy the District that such Proposer is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein. Conditional Proposals will not be accepted.

***Proposal Submission:***

Three (3) copies and one (1) electronic copy saved on a USB flash drive of the proposal and other required documents must be submitted in a sealed envelope clearly labeled " Mount Vernon City School District RFP: Consultant Services for Strategic Planning 2025-2026" with the name and address of the proposer and submitted to:

**Hillary Thompson  
Purchasing Agent  
Mount Vernon City School District  
165 North Columbus Avenue  
Mount Vernon, New York 10553**

One copy of the proposal must be titled "ORIGINAL" and each of the other two copies titled "COPY". Each page of the proposal must bear the following information: Name of Proposer, Mount Vernon City School District RFP: Consultant Services for Strategic Planning 2025-2026, and the page number. The USB flash drive must be placed in a separate envelope labeled with the proposer's name and included with the proposal submission. All materials submitted in response to this request for proposal shall become the property of this School District.

All proposals must be received on or before **March 16, 2026 at 11:00 a.m.**

There is no express or implied obligation for the School District to reimburse responding individuals or organizations for any expenses incurred in preparing proposal or attending any interview in connection with responding to this RFP. Proposals submitted after the stated time and date will not be considered and will be returned to the organization unopened. Any questions or requests for clarification concerning this RFP must be addressed to the School District's Purchasing Agent, Hillary Thompson in writing via fax at 914-665-1682 or by email at [hthompson@mtvernoncsd.org](mailto:hthompson@mtvernoncsd.org) prior to Mach 10, 2026 at 11:00 a.m. Responses to any questions will be sent to all prospective proposers in writing as an addendum to this RFP.

All proposals must be submitted in parts and will be evaluated as such. **Part I** must consist of responses to organization and qualification items. **Part II** must include the cost proposal to provide the consultation services described herein. All aspects of this RFP shall be addressed in the proposal. Incomplete submissions will not be considered for award.

The proposer's cost proposal must be submitted separately in a sealed envelope and shall include its proposed fee quoted as an all-inclusive lump sum for the work of this engagement. In addition, please state which principals and/or staff are expected to perform the services. For each work item excluded from the lump sum quoted, please include the rates associated with that excluded item of work.

The District reserves the right to retain all proposals submitted and use any idea in a proposal regardless of whether that proposal is selected.

***Proposal Evaluation:***

The District will evaluate each of the proposals submitted in accordance with the terms of this RFP. Proposals will be evaluated in accordance with the following criteria:

- Responsiveness to this RFP
- Compliance with qualification requirements
- Experience of staff assigned to engagement
- Quality and appropriateness of the firm's work plan

- Research, evaluation and consultation approaches
- Cost

The Board of Education will select the individual or firm based upon the proposals and the recommendations of the School District's administration. While cost is an important element in the decision to award this RFP, it will not be the sole determining factor. It is anticipated that the individual or firm will be selected within forty-five days of the RFP opening. Following notification of the individual or firm selected, it is expected that a contract will be executed. The selected firm must be prepared to begin work immediately.

**Award and Right to Reject Proposals:** The School District reserves the right to reject without prejudice any and all quotations received under the RFP, to request additional information from all proposers, to negotiate with one or more of the finalists regarding the terms of the engagement and to make award offers that differ from the organizations proposed level of services and/or cost proposal. The District intends to select the organization or individual that, in its opinion, best meets the School District's needs. The Board of Education reserves the right to interview any of the proposers as it deems to be in its best interest. Dates for interviews shall be determined after submission of proposals. Interviews will be conducted by the Board of Education as a whole or a subcommittee of the Board of Education, in the Board of Education's discretion.

**Termination of Contract:** Any contract agreed to under this RFP is subject to termination by either party upon thirty (30) days written notice. In the event of termination of the contract by the District, the District's responsibility shall be limited payment for services performed and costs incurred by the organization with the District's consent, prior to termination. In the event of termination of the contract by the organization, the organization's responsibility shall be to pay for any and all costs incurred by the District.

**Insurance:**

- a. Notwithstanding any terms, conditions or provisions, in any other writing between the parties, consultant hereby agrees to effectuate the naming of the District as an additional insured on the consultant's commercial general liability and excess liability insurance policies. If the policy is written on a claims-made basis, the retroactive date must precede the date of the contract.
- b. The policy naming the District as an additional insured shall:
  - i. Be an insurance policy from an A.M. Best rated A- rated or better insurer, licensed and admitted to conduct business in New York State.
  - ii. State that the consultant's coverage shall be primary and non-contributory coverage for the District, its Board, employees and volunteers with a waiver of subrogation in favor of the District for all coverages including Workers' Compensation.
- c. The District shall be listed as an additional insured by using endorsement CG 2026 or equivalent. The decision to accept an alternative endorsement rests solely with the District. A completed copy of the endorsement must be attached to the certificate of insurance.

- d. The certificate of insurance must describe the specific services provided by consultant that are covered by the liability policies.
- e. Consultant shall provide a copy of the declaration page of the liability and umbrella policies with a list of endorsements and forms. Consultant will provide a copy of the policy endorsements and forms.
- f. Consultant agrees to indemnify the District for any applicable deductibles and self-insured retentions.
- g. Required Insurance:

- i. **Commercial General Liability Insurance:**
  - \$1,000,000 per Occurrence/\$2,000,000 Aggregate
  - \$2,000,000 Products and Completed Operations
  - \$1,000,000 Personal and Advertising Injury
  - \$1,000,000 Sexual Misconduct and Assault
  - \$100,000 Fire Damage
  - \$10,000 Medical Expense

Coverage for sexual misconduct must be affirmed. There will be no coverage restrictions and/or exclusions involving Sexual Assault and Molestation related claims.

- ii. **Workers' Compensation and N.Y.S. Disability:**

Statutory Workers' Compensation, Employers' Liability and N.Y.S. Disability Benefits Insurance for all employees. Proof of coverage must be on the approved specific form, as required by the New York State Workers' Compensation Board. ACORD certificates are not acceptable.

A self-employed person and certain partners and corporate officers are excluded from the definition of "employee" pursuant to Workers' Compensation Law Section 2 (4). As such, individuals in such capacity are excluded from Workers' Compensation Law coverage requirements. A person seeking an exemption must file a CE-200 form with the state. The form can be completed and submitted directly online to the Workers Compensation Board:

[http://www.wcb.state.ny.us/content/ebiz/wc\\_db\\_exemptions/requestExemptionOverview.jsp](http://www.wcb.state.ny.us/content/ebiz/wc_db_exemptions/requestExemptionOverview.jsp)

- iii. **Professional Errors and Omissions Insurance:**

\$2,000,000 per occurrence/\$2,000,000 aggregate for the professional acts of consultant performed under the contract for the District. If written on a "claims-made" basis, the retroactive date must pre-date the inception of the contract or agreement. Coverage shall remain in effect for two years following the completion of work.
- iv. **Cyber Insurance:**

\$1,000,000 per occurrence, \$1,000,000 aggregate.

- v. **Excess Insurance:**  
\$2,000,000 each occurrence and aggregate. Excess coverage shall be on a follow-form basis.
- h. Consultant acknowledges that failure to obtain such insurance on behalf of the District constitutes a material breach of contract. Consultant is to provide the District with a certificate of insurance, evidencing the above requirements have been met, prior to the commencement of work. The failure of the District to object to the contents of the certificate or the absence of same shall not be deemed a waiver of any and all rights held by the District.
- i. Consultant further acknowledges that the procurement of such insurance as required herein is intended to benefit not only the District but also, the District's insurer.

**Indemnification:** The successful proposer will defend, indemnify and save harmless the District, its employees and agents, from and against all claims, damages, losses and expenses (including without limitations, reasonable attorneys' fees) arising out of, or in consequences of, any negligent or intentional act or omission of the performance of successful proposer, its employees or agents' obligations under this Agreement, to the extent of its or their responsibility for such claims, damages, losses and expenses.

**Independent Contractor:** The successful proposer will be retained by the District only for the purposes and to the extent set forth in this RFP, and its relation to the District shall be solely that of an independent contractor. As such, the compensation being paid pursuant to this RFP shall not be subject to withholding taxes or other employment taxes required with respect to compensation paid by the District to an employee.

The successful proposer shall observe all requirements imposed by any laws upon corporations. The District shall submit a Form 1099 and IT 2102.1 at year end to the Federal government, which the Provider will report for income tax purposes. Neither the successful proposer nor any of its employees, agents or assigns will be eligible for any employee benefits whatsoever relative to this RFP including, but not limited to, Social Security, New York State Worker's Compensation, unemployment insurance, New York State Retirement System benefits, health or dental insurance, or malpractice insurance.

With regard to employees of the successful Proposer, the successful Proposer alone shall be responsible for their work, personal conduct, direction, compensation, and for payment of all employment and other taxes in relation thereto.

**Contract:** The successful proposer will be required to execute a written contract with the Mount Vernon City School District which shall incorporate the terms and conditions of this RFP.