

REQUEST FOR PROPOSALS

RFP # 2026-01

BUSINESS SCENARIO PLANNING

CONSULTANT

UNITED PLANNING ORGANIZATION

Request for Proposals (RFP)

Cover Page

Solicitation Issue Date: Friday, February 13, 2026			
Solicitation Closing Date: Friday, March 6, 2026		Solicitation Closing Time: 2:00 PM (EST)	
Issued By: United Planning Organization (UPO)			
Address: 301, Rhode Island Ave, NW, Washington, DC 20001			
Telephone Number: 202-238-4600			
UPO is a non-profit agency in the District of Columbia, founded in 1962 and is exempt from any local, state or federal taxes.			
Unless otherwise stated, the unit price shall be the net price. Separate unit and total prices must be shown, if applicable.			
Responses must be received on or before March 6, 2026 by 2:00 PM (EST). Early submission of proposals is encouraged.			
Electronic responses: Please submit your Proposal to procurement@upo.org , referencing “ Scenarios Planning Consultant ” - RFP #2026-01 ” in the subject line.			
For Questions/clarifications, please email rhaque@upo.org referencing “ Scenarios Planning Consultant ” - RFP #2026-01 ” in the subject line. Questions must be emailed no later than COB on Monday, February 23, 2026 . All questions received by this deadline will be answered within three (3) business days and will be posted as Q&A on the UPO website.			
UPO reserves the right to waive informalities or irregularities, to reject any or all bids or proposals received, to accept the proposal deemed best for the organization, and/or request new proposals, if necessary.			
Small or Minority or Women-owned enterprises are encouraged to respond to this solicitation.			
Payment Term - N-30: From the date the invoice is received by Accounts Payable of UPO’s Finance Division.			
Use of AI platforms such as ChatGPT, Grok, etc. to complete the contracted work must be disclosed to UPO.			
Any objection to the above conditions must be clearly indicated in the proposals.			
In compliance with this RFP and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.			
VENDOR IDENTIFICATION			
Company Name:			
Mailing Address:			
Telephone:			
Email Address:			
Print Name	Title	Authorized Signature	Date

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I. INTRODUCTION

The United Planning Organization (UPO) is the designated Community Action Agency for Washington, DC. It was founded in 1962 as a 501 (c)(3) non-profit, human service organization and following passage of the Economic Opportunity Act of 1964, UPO was designated as the [Community Action Agency](#) (CAA) for the Washington, DC metropolitan area. As the only designated CAA for the District of Columbia, UPO's 400+ employees are responsible for providing leadership, support and advocacy to low-income residents as a means of attaining self-sufficiency by offering more than 20 programs to more than 50,000 residents annually.

II. PURPOSE

UPO is seeking an experienced scenario planning consultant to guide discussions by internal and external stakeholders and to subsequently create a fiscal and programmatic scenario plan that positions UPO to adapt our programmatic strategies, decision-making pathways, and operational plans to the range of most likely national and local conditions and scenarios that could positively or adversely impact our business or sector.

III. UNITED PLANNING ORGANIZATION – MISSION & PROGRAMS

UPO has a mission to '*unite people with opportunities*' and offers an array of programs including:

- Early Head Start
- Comprehensive youth services including out-of-school and after-school programs for elementary through high school students
- Financial counseling and housing counseling services
- Year-round homeless transportation services and wellness checks
- Demand-driven vocational skills development in nine content areas
- Job placement and career development services
- Comprehensive substance abuse treatment services
- Community-based, expert volunteer tax preparation services
- Foster Grandparents Program, senior volunteer services
- Community leadership and volunteerism opportunities
- Affordable housing development
- Reentry support services

IV. BACKGROUND

The fiscal picture for human services and community action agencies has been challenged due to national and local grantor funding priorities. To continue to show up effectively for the Washington, DC community, UPO must be prepared for multiple fiscal and policy environments.

UPO intends to proactively clarify:

- The range of plausible external impacts UPO may face.

- How UPO’s programmatic strategies, priorities, opportunities and threats may shift across these scenarios.
- The operational and budgetary implications of those shifts.
- The concrete actions UPO would take under different conditions, and what would trigger those actions.

The selected consultant will guide UPO through a scenario planning and decision-making process. This engagement is meant to be lightweight, time-bound, and decision-oriented. We desire a focused scenario exercise that equips leadership with shared assumptions, clear trigger points, and ready-to-use decision pathways.

V. PROJECT GOALS

Success for this project means UPO is equipped with a full inventory of possible scenarios as well as a well-defined set of decision-ready scenarios that are most likely, clear implications, and actionable trigger points that allow the organization to respond rather than react. The scenario planning process should be clear, streamlined, and minimally disruptive to program staff workloads.

VI. PROJECT OVERVIEW

A. Scope of Work

UPO envisions the work happening in three (3) phases that may overlap.

Phase-1: Co-create a high-level project plan and facilitation approach with a small group of UPO staff
(Duration – Approximately 2 Weeks)

- Establish guiding principles that will drive the process to keep UPO focused on our intended impact, theory of change, and internal values.
 - Review UPO’s theory of change, strategic plan annual reports and programs .
- Establish a project plan that includes:
 - Key deadlines and deliverables
 - Relevant roles and responsibilities
 - Participant engagement plan
 - Shareable project plan that takes into account both capacity and a reasonable timeline for starting the strategic plan
 - Clear success metrics
- Define key potential fiscal impacts and local drivers that need to be tracked at the state and local level to determine potential scenarios.

Phase -2: Discovery and Scenario Development
(Duration – Approximately 1 Month)

Targeted discovery of decision-critical drivers

- Identify key drivers of impact and economics that are facing highest levels of risk, including - Core programmatic activities essential to our impact; Operations; Funding.
- Identify and as needed, conduct research or gather updates about the federal and local policies most likely to impact UPO and should be accounted for in planning.

Scenario Development & Implications

- Develop a set of best-case, moderate, and worst-case scenarios tied to federal and local fiscal and policy projections/outcomes.
- Facilitate a small, but defined number of structured working sessions with a small, targeted subset of leadership and staff, with limited engagement from Board members or partners only where clearly additive.
- For each scenario, identify high-level programmatic, operational, and financial implications.

Phase-3: Action Planning and Preparation of Deliverables **(Duration – Approximately 1 Month)**

Portfolio of Actions & Trigger Points

- Develop a portfolio of actions for each scenario, categorized as:
 - For each action, outline operational implications, budget/economic implications, scenario(s) in which the action applies,
 - Identify key trigger points (e.g. election outcomes, regulatory changes, funding shifts) that would activate specific actions or action bundles.

Decision Pathways & Final Deliverables

- Translate scenarios, actions, and triggers into clear decision-making pathways for fast-moving legal and political environments.
- Prepare final written and slide deliverables that UPO can use with staff, board, and key external stakeholders.
- Lead a final debrief session to close the project and hand off tools for ongoing use. The selected consultant will also participate in meetings with UPO's leadership team, program team directors, and board (and potentially with partners) as needed.

Methodology requirements: UPO expects a blend of qualitative and quantitative approaches. - Provide detailed project plan and methodology for designing and facilitating the scenario planning process, including how you will engage leadership, staff, board, and partners.

B. Deliverables

At a minimum, UPO expects the following deliverables:

- Scenario matrices that outline key scenarios and their implications.
- Brief synthesis notes capturing key insights.
- Concise final memo.
- A slide deck summarizing key findings and recommendations.
- A practical implementation roadmap that outlines immediate next steps, ownership, and timing based upon defined fiscal (or programmatic) changes.

C. Budget and timeline

Budget: Final budget will be determined based on the proposals received in response to this RFP.

Please include a detailed budget summary, including fees, anticipated hours, staffing structure, or materials costs in your proposal.

Timeline:

- February 13, 2026 – RFP issued
- February 23, 2026 – Last day for asking questions/clarifications
- March 6, 2026 – Submission deadline/Proposal opening (PM)
- March 18-25, 2026 – Interviews with shortlisted firms/proposers
- March 31, 2026 – Final decision
- Week of April 13, 2026 – Project start date/kickoff

VII. MINIMUM QUALIFICATION REQUIREMENTS

Following are the minimum requirements for the proposers to be selected for scenario planning of UPO:

- Must be well-versed with the Federal and District of Columbia landscapes
- The contractor/scenario planning consultant must be licensed to operate in the District of Columbia
- The contractor/scenario planning consultant must have at least three (3) years of experience in similar size of scenario planning, preferably for non-profit organizations.

VIII. PROPOSAL REQUIREMENTS

A. General Requirements

1. To be considered for selection, proposers must submit a complete response to this RFP. The Proposal in pdf format, must be submitted electronically to UPO at procurement@upo.org No other distribution of the proposals shall be made by the proposer.

NOTE: A proposer may submit no more than one (1) proposal in response to this RFP.

2. Proposals shall be signed by an authorized representative of the proposers. All information requested should be submitted.
2. Proposers shall respond to the items in the order they are shown in the RFP. The responses should describe the most favorable terms and shall remain firm for 90 days from the closing date. Prices should be submitted exclusive of all federal, state, and local taxes.
3. All documentation submitted with the proposal should be contained in one single volume.
4. Ownership of all data, materials and documentation originated and prepared for this RFP by any proposer shall belong exclusively to UPO.

B. Special Requirements

All pages of the proposal should be numbered, and the following are typical items that a successful proposer will be required to provide to UPO, if awarded the contract, and should be addressed in the proposal in the following order:

1. Proposal Cover Page: Please complete the proposal Cover Page and also the UPO Vendor Identification form included as an attachment (Appendix A) to the RFP.
2. Provide a brief description and history of your organization, providing an overview of relevant experience, especially with reference to scenario planning and contingency planning, non-profit and human service organizations, referencing any specific experience with community action agencies.
3. Provide details of project team's qualifications and experience including resumes of key personnel.
4. Include a statement that the proposer understands UPO requirements for this RFP.
5. Include relevant work samples, particularly scenario planning or strategic planning engagements in complex political or legal environments.
6. Following required Attachments (must also be submitted to UPO along with the proposal):
 - a. Completed and signed RFP Cover Page.
 - b. Completed and signed Vendor Identification form included as **Appendix A** to this RFP.
 - c. Copy of current business license to operate in the District of Columbia.
 - d. Copy of current certificate of insurance evidencing coverage of the minimum required in this RFP.
 - e. Completed and signed ACH Form included as **Appendix B** to this IFB.
 - f. Completed and signed W-9 Form.
 - g. List of at least three comparable work/client references to include organization name, brief description of the program, contact person's name, telephone number, and email address; preferably including community based non-profit organization.
 - h. Pricing Proposal (detailed fee structure, assumptions, hours involved, etc.) It must be all inclusive.

Note: *Individual consultants are not required to submit copies of business license and insurance.*

IX. EVALUATION CRITERIA

- A. All proposals will be reviewed to determine if they adhere to the format and instructions of the RFP, meet the criteria indicated below, and conform to the objectives and requirements of the RFP. An evaluation team will evaluate the merit of proposals received in accordance with the criteria outlined in this RFP. Incompleteness, significant inconsistencies or inaccuracies found within a response may result in a reduction of the evaluation rating.
- B. Contract may be awarded to the Contractor who provides services at the best value for UPO. UPO reserves the right to accept or reject all or any part of any proposal, waive minor technicalities and award the contract which best serves the interest of UPO.

UPO reserves the right to a) waive variances or reject any or all proposals and b) request clarifications from any or all proposers. Proposals shall be rejected if they: 1) are received after

closing date and time, 2) contain alterations not initialed by an authorized official, and 3) do not meet the minimum qualification requirements.

C. The following criteria will be utilized in the evaluation of the proposals:

Qualifications of Key Personnel	– 25%
Experience in Scenario Planning	– 25%
Project/Service Approach/Methodology	– 20%
References (Minimum 3 References)	– 10%
Pricing Proposal/ Fee Structure	– 20%

X. GENERAL TERMS AND CONDITIONS

Please follow this link to refer to the general terms and conditions of this solicitation:

<https://www.upo.org/general-terms-and-conditions/>



VENDOR IDENTIFICATION FORM (must be completed and returned with proposal)

Appendix A

Company Name:	-----		
Doing Business As (DBA):	-----		
Company Federal ID:	-----		
Address:	-----		
Remit To Address:	-----		
Telephone:	-----		
Fax:	-----		
Email:	-----		
Web address:	-----		
Main Contact:	-----		
Person responsible for response (if different):	-----		
Print Name	Title	Authorized Signature	Date



**Supplier ACH/Direct Deposit
United Planning Organization
Accounts Payable**

Appendix B

1. Please Check One:		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEW Direct Deposit	CHANGE Direct Deposit	CANCEL Direct Deposit
2. Vendor/Payee Information		
Name:		
Address:		
Contact Person's Name (if other than payee):		
Telephone Number:		
Email Address:		
3. Financial Institution Information		
Bank Name:		
Bank Address:		
Name on Bank Account:		
Bank Account Number:		
Nine-Digit Bank Routing/Transit Number (ABA):		
Type of Account:	Checking	Savings
4. Approvals/Authorizations - I certify that the information provided on this form is correct, and I hereby authorize United Planning Organization Office of Accounts Payable to electronically deposit payments to the bank account designated above. It is my responsibility to notify UPO Finance Dept for issues with payment received or deposited, and any changes to bank account information at payments@upo.org or (202) 238-4799. I understand that this authorization will remain in full force and effect until UPO Finance Dept received a written notification requesting a change or cancellation and has had reasonable opportunity to act on it, which should take no longer than seven (7) to ten (10) business days.		
Print Name: _____	Signature: _____	Date: _____
Important Information		
Please return completed form via email: payments@upo.org		
Finance Department Use Only		Date Stamp - Received
Reviewed and Approved by _____ Date: _____		