**Strategic Plan RFP**

*Italics show areas for you to fill in with specifics related to your organization.*

About Your Organization

*No two organizations are the same, what makes your organization unique and valuable. This should be a paragraph or two specific to your organization with background information, current information on the project or organization and values you hold for the organization*

About the Strategic Plan

*Tell the group that will respond why you’re engaging in a strategic plan now. Have you never had one? If you have, has your prior one grown old/stale and needs to be replaced or updated? Has there been a change, such as COVID or a pivot of the company, that requires a new look at the world? Tell the group responding why you are interested in pursuing this new plan and what you hope to accomplish, what are your goals. Do this in an open-ended but pointed way, don’t say we want to sell 1,000 more items but instead we need to understand the market we’re headed towards and how we play in it.*

Scope of Work

Our organization is looking to engage a consultant or group to lead us through a strategic planning process. This effort should focus on developing the mission, vision and plans for the next 3-5 years of our organization. These efforts should focus on developing the following information into a report with an executive summary that outlines the below sections:

* Current Operations
  + This section needs to detail our current staffing, operations, marketing/communications and sales. This provides a basis for the future of the organization by detailing where we are coming from.
* Strategic Positioning
  + This section takes a look at the mission and vision of the organization, it should also include our “elevator pitch” of why someone should care about us/buy from us/visit us.
* Environment (PESTLE – Political, Economic, Social, Technological, Legal and Environmental)
  + This section takes a look at the environment in which we operate and focus on the overall landscape instead of simply what our organization does. This section probably won’t have details about your organization specifically but more of the climate and environment in the city, state and culture you are operating in.
* Stakeholder Analysis
  + This section takes a look at the locus of control (internal vs external) and the intensity (high vs low) of the stakeholders that play a role in the success and failure of our organization. Interviews with stakeholders of all levels should be included - staff, board, donors, volunteers, visitors, community members...
* Planning
  + This section puts together plans for our operations, marketing and communications, sales and any other area of our organization.
* Leadership Challenges
  + This section looks at the issues that may arise within our leadership.
* Projected Financials
  + This section looks at the financial sustainability of the organization and the operations. Understanding how profitable or unprofitable the organization will be providing insights into needs and opportunities over the next 3-5 years.
* Risk Management
  + This section focuses on risks within the organization and plans to move forward outlining those risks and measures that can be taken to mitigate them.
* Short- and Long-Term Goals/Metrics
  + Developing trackable goals and metrics is critical to understanding if the team is on the right path or falling behind. Strong metrics and goals that define the success of the organization become a critical component to measuring progress. These should be detailed - not “gain more followers on Instagram” but should have values such as “reach 1,000 followers on Instagram by August”.

To complete these efforts several elements are critical and a path forward must be developed. Our organization sees these efforts occurring in three phases with the following work provided.

Introduction/Initial Findings

* Kick off meeting introducing the teams.
* Introductory call with the Executive Director/CEO of the museum (can also include Board Chair if desired). The purpose of this call is to gain a broad understanding of the organization, to help us draft desired questions that may be asked, to identify potential interviewees and gain an understanding of peer organizations.
* Individual Interviews
  + These are typically done in person or via zoom/conference call depending on interviewee’s preference and last about an hour. The intent of these calls is to gather information on the organization, including perceptions, interests, opportunities and concerns.
  + *4-5* members of staff (preferably leadership team)
  + *4-5* board members
  + *4-5* major donors (or clients)
  + *4-5* other (may be constituents, community leaders, visitors, members, etc.)
  + In addition, a digital survey should be developed that can be shared with a broader audience that will allow us to gain a deeper understanding of the organization.
* As the interviews are going on, consultants will also be developing a competitive landscape putting together information on the community and peer organizations. These efforts should begin to provide benchmarks for the organization to compare itself against.
* At the end of the interviews, the consultant will draft a summary of the interviews and a landscape within which the organization operates that looks at the community and peer organizations. Consultant should be prepared to present the findings either in person or via zoom.

Development

* Consultant will gather the feedback from the Initial Findings Report and Meeting and utilize that to start to draft a foundational plan for the organization.
  + This foundational plan will identify the mission, vision and current operations of the museum.
  + The purpose of this work is to ensure that the mission and vision align to the operations and, if they don’t, assist the leadership team in working through alignment.
* After ensuring that the foundational plan is aligned, consultant will begin to overlay the draft of the strategic plan. Beyond the mission, vision and current operations the draft strategic plan will look at the above-mentioned sections.
* The draft plan is typically not developed with graphics or a strong visual presence but is focused on the content.
* Upon completion of the draft report, the consultant will host a presentation in person or through zoom with the senior team and desired board members to share the findings.

Final Strategic Plan

* Consultant will gather the comments received during the draft strategic plan presentation and implement the desired feedback.
* Consultant will at this time develop any necessary visuals and graphics for the strategic plan.
* Consultant should plan on developing and delivering three strategic plans:
  + A full strategic plan that has great detail.
  + A summary strategic plan that is more likely to be read by board members, major donors, etc.
  + A presentation format that can be shared with the community, presented to the board or major donors.
* Consultant will present the final strategic plan at this time to the desired senior team/board of the museum.

Deliverables

* Initial Findings Report – Made up of information gathered from the interviews, surveys and competitive landscape of the community and peer organizations.
* Foundational Plan – Made up of the mission, vision and current operations of the organization.
* Draft Strategic Plan – Integrating in the feedback and information developed from the Initial Findings Report and Foundational Plan the Draft Strategic Plan builds the future of the organization.
* Final Strategic Plan – Delivered in 3 formats (full detail, summary document and a presentation format) this strategic plan identifies the future of the organization and lines up a clear path to success.

Timeline

Below is the anticipated timeline of the RFP:

*Issue RFP - DATE*

*Questions Due – 1-2 weeks after RFP issued*

*Questions Answered – 1 week after Questions Due*

*Proposals Due – 3-4 weeks after RFP issued*

*Firm Selected – 1-2 weeks after RFP issued*

Selected firm should anticipate a *six-month* timeframe for the scope of work and should include a schedule that shows the operations over the course of those six months. If a different period of time is being proposed, the proposing firm should explicitly show why more or less time is needed.

Budget

*The current budget for this effort is not to exceed $75,000.*

Proposals should include

1. About your firm
2. Bios of the team that will work on the project
3. Proposal of approach
4. Schedule
5. Proposal of fees
6. 3 References Including a Summary of the Scope of Work Performed (Ideally similar organizations/similar scopes)

Response Submissions

*Responses must be emailed (PDF) to … and be received by the deadline indicated in this RFP. Please title the PDF with “RFP: … Strategic Plan” and the name of your company.*

*Email … at ……*

Other

The Selection Committee will shortlist the proposals and select a candidate to negotiate a final contract with.

*Work would be intended to start ...*

Upon award, the Organization will make current information, research and documents requested available through shared cloud storage. Any other information requested by the selected team will be made available to the best of the ability of the organization.

Point of Contact

*Questions should be submitted to … at ...*