



Request for Proposals

Design and Facilitation of RFA's Strategic Planning Process

June 2022

[Research for Action](#), Inc. (RFA) seeks a qualified facilitator to lead the organization's Board of Directors and nearly 40 member staff through an inclusive and engaging strategic planning process that will include board and staff members between September 2022 and March 2023, resulting in an updated mission statement and actionable five-year strategic plan.

Organizational Overview

RFA is a Philadelphia-based, nonprofit education research organization with a national portfolio of rigorous research on educational policies and practices. RFA's goal is to improve equity, opportunities, and outcomes for students and families. As a leader in the field of education research and an effective partner in a broad range of local, state, and national P-20 education reform initiatives, RFA's work is designed to strengthen schools and postsecondary institutions; provide evidence-based recommendations to policymakers, practitioners, and the public at local, state, and national levels; and enrich civic and community dialogue about public education.

RFA currently employs 38 full-time staff members with diverse backgrounds and identities, has an annual budget of \$5-6 million, and conducts research and evaluation services for clients ranging from major national foundations and organizations to small local nonprofits. RFA's board consists of 13 members who represent many professional backgrounds and disciplines, including education research/academia, law, human resources, communications, and finance. RFA currently operates primarily remotely due to the ongoing pandemic, and has begun to implement a hybrid workplace. Currently, a half-dozen full-time staff members live outside the immediate Philadelphia area.

In the past year, RFA has undergone an executive leadership transition. As a result of a competitive, national search process, Dr. Kate Callahan, a 12-year veteran of the organization, was appointed Executive Director. In partnership with RFA staff and board members, she has laid out an ambitious vision for the organization's mission, centered on expanding and deepening RFA's reach and impact toward anti-racist and more socially and racially just and equitable education systems, policies, and practices through culturally responsive research and community engagement. Internally, this mission translates into the development of a positive organizational culture founded in equity, belonging, and trust.

Objectives of Strategic Planning

RFA is seeking an individual or firm to provide facilitation and strategic plan production services for RFA's strategic planning process, formalizing and building on RFA's redefined mission and vision as described above. The individual or firm will work with a representative

committee of RFA leadership, staff, and board members, as well as involve all board and staff members in the design and execution of the strategic planning process. RFA values principles of diversity, equity, and inclusion in all organizational enterprises.

RFA's goal is to select three qualified firms or individuals to engage in an interview process as finalists with a subcommittee of board and staff members in early August, with the intent to collaboratively design and implement a strategic planning process and launch the work in September 2022. Finalists may be asked to provide additional supporting materials, such as design or products that demonstrate their experience conducting successful strategic planning processes, at that time. ***We envision a 6-9 month engagement with a budget of around \$70,000, but welcome alternative proposals.***

If you and/or your firm has expertise in nonprofit strategic planning and are interested in partnering with RFA in developing the organization's next strategic plan, we ask that you complete a proposal as specified and return it with all requested materials for our consideration. We will accept and review applications on a continuing basis between July 1st and July 15th, 2022. We strongly prefer candidates who can lead a hybrid strategic planning process but whose facilitators could be present in person in Philadelphia, and candidates with the demonstrated ability to support research organizations and organizations with missions centered on equity or social justice.

Services Requested

RFA is seeking an individual or firm to design and implement a phased approach to guide RFA through the strategic planning process, including, but not limited to, the following three phases:

1. ***Discovery and planning phase***, gathering and processing information and input from various stakeholders, including, but not limited to, RFA's board of directors, staff, and external clients/funders as necessary. This phase would result in:
 - A proposed customized strategic planning process and timeline for RFA based on its history and current state, which includes mission and vision redefinition. Options for a mixed in-person/hybrid process are encouraged.
2. ***Strategic planning process implementation***, designing, facilitating, and advising RFA stakeholder engagement in the strategic planning process, including mission and vision redefinition. This process would build off, but not be limited by, RFA's draft strategic goals:
 - Further develop RFA capacity and expertise to produce culturally responsive research for racial and social justice through action and community engagement.
 - Identify and align our internal culture and research portfolio to fully embody the organizational values that underlie our redefined mission and vision.
 - Strengthen RFA's reputation as convener, research capacity builder, tool developer, and community liaison.

We envision the selected candidate providing expert guidance during the planning process on mission and vision alignment, goals, and strategies. This phase would result in:

- An internally representative and equitable planning process that will directly inform the 5-year strategic plan developed in phase 3.
- Interim reports documenting planning process milestones, including progress updates and next steps, and key takeaways to date.
- Draft framework for the 5-year strategic plan, based on results of inclusive strategic planning activities.

3. **Strategic plan production phase**, synthesize all information and feedback to date and translate into an achievable and consensus-driven strategic plan document to guide business and growth, aligned with RFA’s redefined mission and vision. We envision a collaborative and iterative process of development in which the selected candidate leads draft production with input from RFA leadership and staff. This phase would result in:

- A full-fledged 5-year strategic plan document
- A high-level 1-page summary of the strategic plan that is appropriate for sharing widely with RFA stakeholders and funders

Proposal Requirements

RFA will consider proposals from individuals and/or firms with specific experience and success collaborating with nonprofit organizations in designing and facilitating engaging and inclusive strategic planning processes for multiple stakeholders, including both board and staff members. We strongly prefer candidates who can lead a hybrid strategic planning process but whose facilitators could be present in person in Philadelphia, and candidates with the demonstrated ability to support research organizations and organizations with missions centered on equity or social justice.

All proposals must include the following criteria:

1. Individual or firm name, address, and telephone number. The point of contact who should be the proposed individual leading the engagement.
2. Brief history of the firm, including number of years of experience in designing and facilitating strategic planning processes for nonprofit or similar professional services organizations. Include any knowledge or experience working with research and evaluation organizations and/or organizations that are funded through grants and contracts.
3. Description of how the individual or firm designs and structures such processes to ensure principles of anti-racism and diversity, equity, and inclusion are honored and included. Please also include approaches and experiences with addressing conflict and competing priorities while honoring individuals’ perspectives.

4. A proposed timeline and description of the individual or firm's approach in planning and executing all phases of the process including how the firm will utilize hybrid strategies for engaging staff and board members throughout the strategic planning process in an inclusive and equitable manner.
5. Description of specific services to be provided (please review the "Services Requested" section above for additional information).
6. A brief description of how the individual or firm defines and maximizes success for a strategic planning process such as the one sought through this RFP.
7. List of proposed personnel for this engagement, including each individual's background, education, and experience, as well as number of years of experience, title or function; relevant projects within the last three (3) years; and the role each individual will assume in this engagement. Also provide a full curriculum vitae for the proposed engagement lead.
8. Description of fee structure and anticipated cost. Provide a detailed budget and timetable for the proposed work.
9. List of three or more clients for whom successful strategic planning processes were designed and implemented, including contact names and information for each.

We ask that proposals are no more than 5 pages, excluding CVs, budget, and references, and are submitted in Word or PDF format.

Please submit questions about this request for proposals to amurawski@researchforaction.org by 5:00 pm on June 29, 2022.

Please submit completed proposals to amurawski@researchforaction.org between July 1 and 5:00 pm on July 15, 2022.

Terms and Conditions

Responses will be evaluated on experience, reputation, references, capacity, services, costs, and any other relevant factors as determined to be in the best interest of RFA.

A short list of finalists will be notified via email by 5:00 p.m. on July 22, 2022 and invited to schedule an interview with us in early August.

Respondents who were not selected for an interview will also be notified via email by 5:00 p.m. on July 22, 2022. RFA will not be able to provide feedback to respondents who were not selected for an interview.

RFA reserves the right to:

- Modify any deadlines listed in this Request for Proposal.
- Reject any or all proposals submitted for any or no reason in its sole and absolute discretion, and to waive informalities and irregularities in the proposals received and to

terminate this request for proposals, and reissue a subsequent solicitation, and/or remedy errors in the process in its sole and absolute discretion.

- Request clarification and additional information from any Respondent during the evaluation process.
- Request that the Respondent(s) modify the submitted proposal to more fully meet the needs of RFA.
- Conduct investigations of the qualifications of the Respondent(s) as deemed appropriate.
- Negotiate with Respondents selected for interview to include further services not identified in this RFP.

Respondents should make no contact with RFA's Board of Directors or employees except as specifically provided herein. Violation of this provision is considered unethical and may be grounds for removal of further consideration.

Ownership of all data, materials, and documentation originated and prepared for RFA pursuant to the proposal request shall belong exclusively to RFA. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary, or trade secrets, is not acceptable and may result in rejection of the proposal.