

**REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING**

**July 2019**

**PURPOSE**

The National Alliance for Volunteer Engagement (the Alliance) is seeking proposals from qualified individuals or firms to facilitate the development of a strategic plan between September 2019 and February 2020. The successful bidder will work closely with the Alliance facilitators and leadership team to develop the specific details and logistics of the planning process.

**BACKGROUND**

In July of 2017, the Minnesota Association for Volunteer Administration (MAVA) hosted a National Summit on Volunteer Engagement Leadership to bring together experts and practitioners from around the country to explore how to increase capacity for mission-driven volunteer engagement.

This event sparked the creation of a National Alliance to support building a strong coalition designed to elevate existing networks, organizations and individuals to drive a national conversation about the power and potential of volunteer engagement, as well as encourage collective action for nationwide engagement strategies.

An interim leadership task force was appointed and charged with developing a coalition structure to address the recommendations which emerged from the National Summit. In the two years that followed, a contract facilitator, a contract administrator, and dozens of volunteers have been hard at work developing a thoughtful, sound, inclusive structure to carry forward this critically important work.

The National Alliance is designed to convene leaders across many roles and sectors – including philanthropy and grant-making, faith-based groups, health and human service organizations, government agencies, civic initiatives, membership associations, higher education, other nonprofit entities and beyond. After an exhaustive recruitment process which included more than 140 applicants, the formal Leadership Team has been selected and recently put in place. Working Group participants and Advisors for the National Alliance are currently being recruited.

A PowerPoint overview of the Alliance is available here.

The mission of the National Alliance for Volunteer Engagement is ***to guide and inspire collective action towards embracing volunteer engagement as a key strategy for driving positive community change***.

To strategically engage volunteers is to maximize existing volunteer resources, unlock volunteer potential, and achieve greater impact by shifting the mindset of volunteer engagement as a static program to an integrated core strategy across organizations.

Through the work of the Alliance, we are creating a new future for volunteer engagement where…

* **… collaboration is maximized at the local and national levels and across sectors to elevate volunteer engagement**. Strategic volunteer engagement is integrated through diverse partnerships and supported by influential stakeholders. Perspectives are broadened and efforts are leveraged to create lasting, meaningful change.
* **… volunteer engagement is viewed as a strategy – rather than a program – to measurably increase mission-driven impact.** A shared, research-driven, consistently delivered vision for engagement is communicated throughout organizations, communities, and the nation. A unified professional vision and voice is channeled through a robust leadership pipeline.
* **… volunteer engagement is viewed by funders as a cost-effective strategy that helps organizations achieve their missions.** Awareness of the need for infrastructure and support inspires innovative investments and grant-making opportunities.
* **… research on volunteer engagement is relevant and accessible, and insights are converted into actionable steps.** Higher education is engaged by institutionalizing related course work and setting standards. Research priorities are shared and results widely disseminated, providing a bridge between local action and academic work.
* **… communication is centralized on the national level, providing a critical hub for information, tools, resources, best practices, and connections to other relevant organizations.** This national communications hub serves as a platform to cultivate emerging leaders in volunteer engagement, share research and best practices, and standardize impact measures. It supports a peer learning network that offers mentoring and creates connections across communities of practice. Peer-owned and peer-driven, this hub accelerates continuous improvements in the field of volunteerism.
* **…through regular convenings (in person and virtual), there is ongoing collaboration and exchanges of best practices and cutting-edge innovations.** Best practices in training for effective engagement are shared across sectors. There is ongoing collaboration and exchange between the local and national levels, amplifying their roles as agents of change.

**SCOPE OF WORK**

The National Alliance for Volunteer Engagement is seeking a contract facilitator to partner with us on our strategic planning process. Specifically, we anticipate the contract facilitator helping us design the planning process over the next few months (August – November) and will then facilitate the planning process at a two-day retreat sometime in December or January (to be determined based on availability of the leadership team).

The successful bidder will provide these services:

**Close Collaboration.** Work closely with the Alliance facilitators and leadership team to develop specific details of the planning process, including the timeline, logistics, and the look and feel of the deliverables. We welcome creativity and desire a collaborative facilitator open to suggestions and feedback with respect to the content and structure of both stakeholder engagement and in-person planning session.

**Stakeholder Engagement.** Engage stakeholders including, but not limited to, Alliance Advisors and Working Group participants. Additional stakeholders may include targeted leaders in the field of volunteer engagement field as well as cross-sector, such as philanthropy, human resources, and others to inform the strategic planning process. Stakeholder engagement may take many forms, in addition to online focus groups, surveys or phone interviews, and we welcome creative ideas and approaches. Your proposal should describe how you propose engaging stakeholders, the anticipated time an individual stakeholder might have to commit, and how you will share the results and analysis of the stakeholder input.

**In-Person Planning Session.** Conduct a two-day strategic planning session with the Alliance leadership team and facilitators that is currently comprised of eleven (11) individuals. It is up to you to outline in your proposal the content and the outcome(s) of the session(s). Other sessions could also be virtual with a few additional targeted participants in the Alliance. Overall planning outcomes should include a review of the mission and vision, as well as strategic goals, strategies, and key performance indicators.

**Completion of the Plan.** Post retreat, support the Leadership Team and Facilitators as we work to develop detailed work plans containing objectives, activities, and success measures.

The proposal will provide an executive summary of the work that will be performed by the consultant and a detailed work breakdown structure, with timeframes, of the steps that will be taken to develop a strategic plan.

**TIMELINE**

We anticipate the consultant selection and strategic planning process to follow this time table:

Proposals Due August 16, 2019

Consultant Interviews and Selection August 19 – 30, 2019

Contract commencement September 6, 2019

Gather stakeholder input September – October 2019

Review stakeholder input November 2019

Conduct in-person planning session December 2019 or January 2020

Submit final deliverables February 2020

**INSTRUCTIONS FOR PROPOSAL SUBMISSION**

Responses should provide a straight forward and concise description of your ability to meet the requirements of this RFP. Emphasis should be on completeness and clarity of content. Please be sure to include the following information:

* Overview of your firm/business
* Your philosophy and approach to strategic planning
* A summary of strategic planning experience
* Examples of similar projects
* Three client references
* Suggested project timeline with major tasks and milestones
* Sample project plan
* Name, title, address, telephone number, email address, and relevant experience for each person engaged in the project (If a consultant group or partnership of consultants, the proposal should indicate who will serve as the primary point person)
* A statement of project cost, including consulting time, materials, travel, and other anticipated costs. Project cost shall be itemized as follows:
  + Strategic planning
  + Stakeholder engagement
  + Other, including anticipated travel and material costs

**SELECTION CRITERIA AND PROCESS**

Based on the proposals received, the Alliance will select individuals/firms to be interviewed. As a result of those interviews, a consultant will be selected for contract negotiations.

Proposals will be evaluated based on the criteria stated below:

* Experience and expertise of the proposer(s), particularly in strategic planning
* Relevance of similar work experience
* Management approach to the project and philosophy towards strategic planning
* Understanding of the scope of the project and a logical methodology for carrying out the tasks in the scope of work
* Ability to lead, facilitate and coordinate project
* Cost for the work to be completed

The Alliance reserves the right to reject any and all proposals received as a result of this RFP. The Alliance is under no obligation to award a contract as a result of this RFP.

Proposals must be received by 5:00 pm Eastern time on August 16, 2019 as set forth in the above time table to be considered.

The review process will be completed, with the selection of the consultant (or consulting entity) by September 6, 2019.

**OWNERSHIP, CONFIDENTIALITY AND LIABILITY**

All intellectual property will become the property of the National Alliance for Volunteer Engagement. All data remains the sole property of the Alliance. The consultant shall further agree to keep information related to any and all contracts with the Alliance in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential organizational information or proprietary information learned through its dealings with us.

The Alliance assumes no responsibility or liability for costs incurred by you prior to the signing of any contract resulting from this bid and/or post-bid interviews. Further, the awarded vendor is expected to have in place liability insurance germane to the scope of their services.

**CONTACT INFORMATION AND SUBMISSION INSTRUCTIONS**

If you are interested in being considered for this work, please submit your proposal by 5:00 pm Eastern time on August 16, 2019 to the Alliance facilitators, Betsy McFarland ([betsy@adisagroup.com](mailto:betsy@adisagroup.com)) and Dana Litwin ([dana@danalitwin.com](mailto:dana@danalitwin.com)).

We will review responses and schedule interviews between August 19 and August 30, 2019. The review process will be completed, with the selection of the consultant (or consulting entity) by September 6, 2019.

Any questions regarding this RFP may be addressed to the Alliance facilitators, Betsy McFarland ([betsy@adisagroup.com](mailto:betsy@adisagroup.com)) and Dana Litwin ([dana@danalitwin.com](mailto:dana@danalitwin.com)).