

TEMPLATE

Strategic Plan RFP

Mission Minded's Free Template

TEMPLATE

We hope you'll find this Request for Proposal (RFP) template useful as you prepare for your strategic planning project. In addition, the link below will provide even more guidance to help you set your project up for success.

[Your Very Best Communications Consultant](#)

Thinking about Branding, too?

Mission Minded offers our clients the opportunity to save time and money by integrating a brand strategy refresh into the strategic planning process. In addition to the savings, the finished work is stronger because of the strategic integration of the brand with the strategic plan. The link below will show you how it's done.

[Simultaneous Strategic Planning and Branding with Sterne School](#)

We wish you great success with your project, and if you're an independent school, nonprofit or foundation and think we can help, call us at 415-990-9360 or email amplify@mission-minded.com to see whether Mission Minded is the right fit for you.

Project Overview

Write an executive summary that explains:

- What kind of firm you seek
- What you want them to do
- When you need it completed
- Why you want it done

Organizational Background/Overview

This should be one or two paragraphs that explain who you are, what you do, where you're located, and why what you do is necessary and/or important. While you don't have to include your existing strategic plan, do mention when it was completed, its planned duration, and a high-level summary of the methodology used (if you know it). There is no need to include background like research findings, and the like. You can send those later to the consultant you choose. If you've already formed a working committee, include the number of people and their titles.

Mission and Vision

Include your current mission and vision statements and whether these are up for exploration as part of the strategic planning work.

Current Situation

Provide an overview of your current situation and challenges. What's happening in the organization right now? Who are your primary competitors? Why is strategic planning critical to undertake now? Are there major threats or opportunities in play? Include those. What positive outcomes do you foresee resulting from this strategic planning effort? Be specific. "Our plan is expired so we need a new one." "We want to achieve X over a period of X time." Outlining these details will help you find a consultant who's excited about your project. Speaking of finding the right fit consultant, [here's a blog post to guide you](#).

Project Scope and Deliverables

What do you expect the consultant to do on your behalf? Be as specific as possible about the services and deliverables, but don't prescribe how you want the work done. Let the experts recommend the best methodology for you. Be clear if there are any requirements on process. Share details on the depth of community involvement you think is right for your organization. Some want a small group of leaders to work in isolation with their consultant to create the plan and will share it later to the rest of their stakeholders. Others know that deep community engagement throughout including surveys, town hall-style meetings, an active steering committee, and multiple rounds of engagement by various stakeholders is the key to success.

Proposed Timeline

Explain what drives your timeline. Be realistic both about your time and the consultant's time. If you have wiggle room, share that as well. An aggressive deadline may drive up costs. If there is no hard deadline don't feel a need to specify one. That will allow your preferred consultant to recommend the most efficient approach. If you have any "must" meeting dates, such as board meetings you may have reserved for strategic planning work, include those.

Budget

Share your anticipated budget, range, or not-to-exceed figure. Most consultants will use the budget range to determine whether the project is a good fit for the way they work. It's unlikely you'll get a big price break by being cagey. Being clear about what you can spend, or a figure you cannot exceed, will save you time by weeding out consultants that are not in your price range. It will also allow those firms that do bid on your job to accommodate your budget most efficiently. No nonprofit has as much money as they wish. Your consultant's job is to figure out how best to allocate your budget so you get maximum impact.

Proposal Requirements

Firm information

Provide agency's name, address, URL, and telephone. Include name, title and email address of the individual who will serve as agency's primary contact. Include a brief description and history of your firm.

Project approach

Explain your project approach, style, and process.

Provide biographies of key staff

Include a summary of experience of all key staff.

Experience

Proposals should include a list describing projects that are similar in scale to ones that your firm has completed. Where possible, highlight work for analogous organizations.

Schedule and timeline

Proposals should include the estimated project duration.

Cost

Proposals must include the estimated cost for all work and list of anticipated expenses.

Deadline

Submit your proposal by _____

Submit to / Contact

Name _____
Direct phone number _____
Email _____
Address _____

Specify whether or not the proposal contact is also the project leader. If not, include the name and contact information of the project leader.

Learn More

Mission Minded is a strategy firm that works exclusively with nonprofit organizations.

We believe inspired and actionable planning is essential to a nonprofit's success. Every day we help our clients uncover the big, bold ideas that catapult their organization to their next version of greatness. Because in today's world a worthy mission is not enough, you need a road map and a set of essential questions to guide you on your journey.

As a result, our clients successfully gain the clarity and support they need to achieve their goals. To find out how Mission Minded can help your organization, call us today at 415-990-9360.