



Enhancing the health and safety of children, families, and communities

REQUEST FOR INFORMATION

Strategic planning at Northwest Resource Associates

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Contents

[Introduction](#)
[Project overview](#)
[Context](#)
[Goals](#)
[Tangibles](#)
[Process](#)
[Timelines](#)
[Budget](#)
[How to engage](#)

Introduction

Headquartered in Seattle, Northwest Resource Associates is a nonprofit social services agency, specializing in providing support for children and teens in foster care and adoptive families. We are 40 employees strong and have offices and programs in Alaska, Washington, and Oregon. Our organization is more than four decades old, and we have recently had a change in leadership, as the founding executive director retired. Our employees are working remotely during the pandemic.

We are in search of a strategic planning consultant to help us identify and document agency goals for the next three years and revisit our vision, mission, and values. We're issuing this request for information to make the selection process fair and efficient for consultants and ourselves. We are aiming to keep it as simple as possible. Thank you for considering our project.

While affordability will be an important factor in our selection of a consultant, we're also looking for a strategic planning process that makes us excited to get started and has a high probability of success.

Finally, we are also looking for a racial equity consultant. We welcome your interest in both areas, and we welcome consultants to team up.

Project overview

It's time to remind ourselves why we got into this work in the first place and to think critically about how we can be most effective. By describing our vision of a better world and how we plan to make it a reality, we'll inspire ourselves and create the roadmap we need to further develop our agency and grow our work, so that we can connect and support even more children, youth, and families.

We expect the strategic planning process to involve, at some level, every employee at the agency and the board of directors, so that our plans benefit from experience, wisdom, and creativity throughout our organization.

Context

As an agency, we have successful programs that are well known in their respective states or at the national level. We see opportunities to strengthen the agency brand, improve collaboration among the programs, diversify funding sources, increase the diversity of our staff, do more to eliminate systemic racism, and help more children and families.

Now is a great time for Northwest Resource Associates to undertake strategic planning because:

- **We have new leadership.** Our founding director recently retired. As we move forward, we want to make sure we keep what we love and what works about our agency while capitalizing on the potential of new energy.
- **We have work to do.** Much of our work is in the child welfare sector, which has a history of racism. To this day, children of color are disproportionately represented in foster care. Like many organizations in the sector, our organization does not reflect the diversity of the communities we serve. We need to set and prioritize racial diversity and equity goals.
- **The funding landscape can shift.** Our funding landscape may change with the pandemic and the recovery of state budgets. Let's take this relatively sunny day to plan for a rainy one.
- **Pandemic "opportunities" and lessons learned.** The pandemic forced us to find new ways to deliver services, some of which we'll want to keep, even as the pandemic resolves.
- **Operational issues.** There are a number of operational decisions before us: What kind of physical spaces do we need in the future? Should we move the cloud? How can we ensure the security of our information in an age of increasing cyber threats? How can we continue to attract and retain great staff?

Goals

Our primary goals for strategic planning are:

1. Agency leaders and staff are inspired by our vision and mission and are eager to implement programs and pursue opportunities that will help make that vision a reality.
2. We have clear programmatic and organizational development goals.
3. Agency leaders and staff are committed to helping build the kind of organization that reflects our values and goals.
4. With programmatic and organizational development goals in hand, agency leaders have a sense of the resources needed and can work on acquiring additional funding through business development and/or private fundraising.
5. Staff sense an atmosphere of possibility—the idea that there's opportunity to tackle the problems we see in child welfare, that we can help more children

and youth, that we can continuously improve our services, and that staff can learn and grow professionally at our agency.

Tangibles

We hope to come away with documentation that includes the following:

- Vision.
- Mission.
- Values.
- A list of our programmatic and functional competencies.
- Prioritized programmatic and functional goals and objectives for the next three years, including at least one programmatic goal that would inspire collaboration among all our major programs.
- Prioritized organizational development goals and objectives, including for diversity, equity, and inclusion.
- Language about our vision, mission, values, and competencies that we can use on our website, grant applications, and fundraising communications.

Process

When envisioning strategic planning, we noted the following priorities about process:

- **We welcome all voices.** Staff are well positioned to identify the needs they see in child welfare and in the larger social services sector and to understand our individual and collective abilities to meet those needs.
- **Agency leaders will step up.** We want to involve staff across the agency, but participation should not be onerous or too time-consuming for staff. The agency leadership team, which includes the executive director, the CFO, and program directors and their deputies, will ultimately be responsible for completing the work.
- **We will use online tools.** We're a geographically dispersed agency in the first place, and even more so as we continue to work remotely because of the pandemic. We'll need to make use of collaboration tools and videoconferencing.

- **We will be respectful.** We will be mindful of our different offices and their cultures and time zones.
- **We will iterate as appropriate.** We will avoid being perfect and will look for opportunities to practice continuous improvement.

Timelines

We are eager to begin this work and will work with our consultant to identify a reasonable but aggressive timeline.

Our timeline for selecting a consultant (and vice versa) is as follows:

Date	Milestone
October 5	Consultants will have submitted any questions by this date.
October 10	We will have distributed responses to questions.
October 15	Consultants will have submitted information.
October 16	We will begin conducting brief video calls with three to five consultants.
November 5	We will have selected a consultant and confirmed their willingness to engage.

Budget

We are expecting fees between \$15,000 and \$30,000. We are willing to take on tasks and homework—staff surveys, affinity mapping, information gathering, document drafting—that would make this budget work. But we need help driving the process.

How to engage

The following submission guidelines are designed to help us evaluate potential consultants efficiently and fairly, provide consultants with the information they need to evaluate the project, and keep the process as simple as possible.

1. If you are interested in our project, please let us know and submit any questions via email by **October 5, 2021**: nwra@nwresource.org.

2. By **October 15**, please email a letter or document to nwra@nwresource.org. The letter or document should include:

- A description of the services you offer and your experience.
- A brief description of the approach you might recommend and an idea of the activities it could include. (This information can be general; we are not asking for free advice.)
- The names of two similar projects you'd be willing to discuss with us via videoconference.
- What you will need from Northwest Resource Associates to ensure the project's success.
- A ballpark budget estimate.

We anticipate submissions being from one to four pages long. We will accept up to ten pages.

By October 10, we will aggregate and respond to questions and send our responses to all who contacted us to express interest. After October 15, we will review submissions and choose a few consultants to talk with. We will try not to take up a lot of your time, as we understand that this is a relatively small contract.

When evaluating consultants, we will consider the following factors:

- The approach is affordable and a good value.
- The consultant is experienced and credible, can describe past successes with similar projects, and can provide references.
- The consultant is experienced with facilitating groups online.
- We understand the proposed approach and believe it to be practical and in keeping with the project we described above.

Thank you again for your interest!