

Strategic planning and racial equity RFIs: questions and answers

October 8, 2021

Hi consultants, thank you for expressing interest in one or both of our strategic planning and racial equity RFIs. You asked some great questions. Here are our answers. We are not taking time to review and proofread in the interest of getting this information out to you on time. Thank you for understanding!

Can you confirm that you are running separate processes for the strategic planning and the racial equity consultants?

Yes. We are open to two different consultants or to a team taking on both pieces of work. We put the two RFIs on the same timeline to allow for teaming up, which we know some consultants will prefer, and to make the application and selection process more efficient for both sides. But we will consider the two selections separately: Which consultant or team offers the best chance of success for strategic planning? And which consultant or team offers the best plan for helping us build a foundation for racial equity?

When would you like to be finished with the project?

We view the racial equity work as the first step of a multiyear project.

We are hoping to have a solid strategic planning draft or document by end of March 2022.

How do you want to engage the Board in strategic planning?

The Board will be interested in a session where they get to review our planning, discuss a draft, ask questions, and approve the plan. The executive director could take on presenting to the Board, but she can also imagine inviting the consultant(s) to present.

What do you anticipate the involvement of the board to be with regard to the racial equity work?

Although we plan to focus this year's work on staff, we will ask the Board whether they'd like to hear from the consultant at a meeting in the spring and/or invite them to participate in agency trainings.

When was the last strategic planning cycle completed?

More than 10 years ago there was an assessment. To the executive director's knowledge there is no existing plan; rather, each program centers its work around contract requirements and available funding.

Do you have a strategic planning work group identified to partner with the consultant?

Not yet. We will extend the opportunity to staff when we understand more what is needed.

Beyond the employees and board, what stakeholders do you anticipate including in the community engagement phase of strategic planning?

We would like to gather some information from stakeholders, but we do not imagine it being onerous. In each state—Alaska, Oregon, and Washington—we have a state-agency contact for our work. We'd like to connect with them and a handful of other nonprofit partners. Less than 8 outside contacts total.

Why are these separate requests?

We know some great consultants who focus on planning but wouldn't feel qualified to facilitate racial equity learning—and others who focus on racial equity but don't have as much experience with planning. We wanted to open the opportunities to the broadest spectrum of consultants.

In addition, the projects have different timelines. We expect the racial equity piece to be a multiyear effort, and we would like to have a draft strategic plan done by end of March, so that we have information going into our budget season. We expect the racial equity work to change and influence us, and we'll just have to continually revisit the strategic plan. Continuous improvement.

If you choose separate consultants, how do you envision both projects working in concert with/ informing each other? Will the consultants on each work with each other? How will the timelines of each project inform the other project?

We see the projects as potentially separate, though influencing each other. If we choose separate consultants, our agency leadership team will take ownership of liaising.

Would you accept a response that suggests an approach of integrating both the racial equity work and the strategic planning into one scope of work and budget?

Yes.

If we are submitting for both projects, is it best to follow the format outlined in the strategic planning RFI and incorporate the racial equity work, or should we submit two separate documents?

One document is fine. It should contain the information requested in both RFIs.

Is staff morale and retention an area in which the leadership is struggling or considers a priority to address?

We do not have a problem with retention. Staff morale is pretty good, all things considered. It likely varies by program.

Were you envisioning the deliverable to be (1) more truncated and motivational, with key strategies, top priorities, goals, and metrics or (2) a more detailed and comprehensive strategic plan that also delves into each program and organizational development area?

Given the two options, we think it's closer to option 1.

Are you hoping the content included in this strategic plan would be detailed enough to lead the organization through strategies and tactics in acquiring or diversifying funding?

We will use this as a springboard for developing business and fundraising strategies. We do not expect it to take the place of additional strategy work. We hope it prepares the way and gets us pointed in a good direction.

Is there an internal point of contact or project manager for this effort?

The executive director will be the liaison for now. If project management resources become available and are needed, we will dedicate them.

How do your programs currently set goals, and can you give some examples of them?

Program goals are currently linked to contractual requirements and include things like:

- Inspiring prospective parents in STATE to get licensed to foster or adopt
- Making sure adoptive parents in STATE have the information and support they need
- Recruiting adoptive families for X NUMBER of waiting teens in foster care in STATE

Would you prefer the strategic planning team to also lead the DEI consultancy work? And if so, would you prefer two separate proposals or one integrated proposal?

We don't have a preference at this point. We see advantages to having the perspective of more than one consultant or agency, and of course there are advantages to working with a team who will really get to know us. Both projects are very important to our agency's future, so we're really looking for best fit on both counts.

Can you provide an outline of how many staff you have situated in each geographic locale or an organization chart?

We have about 40 staff spread across three states. They include adult education specialists, social workers, software developers, and storytellers. A real gamut!

Are we able to be provided copies of your previous strategic plans?

We aren't currently working with a strategic plan.

How many person hours per month would be available for trainings for your staff?

It depends on the duration of this year's project, but we envision somewhere in the neighborhood of a half-day per month.

How many directors and managers do you have? And, what are their availability for training in person hours per month?

Same as above on frequency. We have an agency leadership team of about eight and at least two other managers in the organization.

How many days and hours per day are the virtual strategic planning sessions to run? How many staff will be attending them?

It depends on who is in them and how the sessions are integrated into the overall process. We had not imagined the process being just about sessions, but potentially conversations with individuals, surveys, small groups, and homework.

The directions provide a limit of 10 pages. Is the budget estimate to be included in the 10-page limit?

All information you provide should be part of the 10 pages, please.