



Request for Proposal Strategic Planning

Deadline for Submission: November 5, 2021

PURPOSE:

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead the ACLU of Virginia through a long-range strategic planning process.

Specifically, ACLU of Virginia is seeking a consultant to provide the following services:

- Work with a Strategic Planning Team, comprised of staff and board members, to articulate a clear strategic plan for FY23-FY25. This plan should identify specific fundraising, financial, communication, and programming objectives for the organization to pursue over the next three years in pursuit of its mission.
- Conduct an internal and external survey to evaluate the ACLU-VA's success in achieving its goals and conduct a general SWOT analysis of internal and external perceptions of the organization.
- Develop a timetable of implementation with specific measurable benchmarks, objectives, and tasks to be accomplished to achieve goals. Identify clear, measurable outcomes for how to measure organizational and strategic effectiveness, impact, and success.
- Establish a framework and process for the organization's leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
- Facilitate all meetings and provide leadership, direction and expert consultation and advice related to the development of an effective strategic plan, including successful implementation.
- Ensure that the values of equity, diversity, inclusion, and belonging are built into every aspect of the strategic plan.
- Deliverable should be a clear, easily consumed, strategic planning roadmap, accompanied by a strategic planning timeline, implementation, and evaluation methodology.

BACKGROUND INFORMATION:

For over 50 years, the ACLU-VA has been the Commonwealth's guardian of liberty, working in courts, legislature, and communities to defend and preserve the individual rights and liberties guaranteed by the Constitution, federal, and state laws for everyone in Virginia. The ACLU-VA has filed more than 300 lawsuits in Virginia over the last 50 years to advance freedom and equality in the Commonwealth. In addition to the ACLU-VA's robust litigation efforts, we also educate the public, inform the media, lobby legislators, organize grassroots activists, and disseminate information to the community through our membership and volunteers.



SCOPE OF WORK:

The ACLU-VA is at a critical point in its organizational growth that can have a significant impact on the state of Virginia. ACLU-VA is engaging in its first multi-year strategic planning process. The affiliate has moved to a proactive, “campaign” approach to our work, emphasizing integrated advocacy including litigation, policy advocacy, communications, and grassroots organizing. Similarly, we have articulated a goal of being more deeply committed to creating authentic relationships with communities. We know that the strategic planning process, and the roadmap to be created, is a productive way to focus the board and staff on the tangible needs of the impacted citizens of Virginia and the organization at this time.

We look forward to working on the development of our next strategic plan to articulate the clear business and programmatic strategies which the organization will pursue over the next three years. We also expect that this process will primarily involve the staff and Board of the organization and that the process will last no longer than five months to complete.

The plan should be meaningful and relevant to our region. It should also help us develop a sustainable financial, programmatic, staffing, and board model to ensure that this organization has sustainable success now and into the future. This plan will be focused on the business plan that will support the organization’s mission. While we would like to re-commit to our mission and values we do not expect to engage in a re-evaluation of those mission and values.

In developing the FY23 – FY25 plan, the applicant selected for this project will be expected to: guide the organization in establishing its Strategic Planning Team, conduct an internal and external survey to evaluate the ACLU-VA’s success in achieving its goals, conduct interviews, and facilitate all working sessions with the Team and other key staff and board members. Based on the analysis, specific goals will be identified and, ultimately, the consultant will work with the affiliate to develop a final strategic plan that provides ACLU-VA with clear objectives and action steps that lead to achieving organizational goals. The strategic plan will also include a plan as to how to measure progress. It will analyze how and when the organization should reassess goals, objectives, and action steps to make sure that they are still relevant and reflect environmental changes.

Specific areas that need to be addressed in the creation of a three-year strategic plan include but may not be limited to:

- An environmental scan that examines internal and external opportunities and perceptions impacting the organization’s ability to achieve mission.
- The development of a sustainable programmatic model to achieve goals.

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

GLOBAL PROJECT REQUIREMENTS & TIMELINE:

1. ACLU-VA is seeking proposals from applicants who can address all of the above stated management issues and who can provide additional expertise to help the organization and the community it serves achieve a successful project outcome.
2. While ACLU-VA understands that completing this project requires significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables (e.g. writing organizational assessments, writing the actual strategic plan, etc.). The staff will not be expected to be involved in writing work project products or final project deliverables.
3. Applicants are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements for all activities involving their participation.
4. Proposals must include a clear description of the applicant's plan to complete all of the project components of the project (i.e. in what order will the projects be completed, how long each component will take to complete, etc.).
5. Applicants must include in their project timelines milestones for project status updates. As work products/deliverables are completed prior to the established milestones, applicants will be required to send ACLU-VA any materials needed to facilitate the status update meetings and/or conference calls. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/call, sending out meeting invites and writing meeting minutes.
6. In addition to the check-in meetings and/or conference calls, the applicant will be expected to present a status update on her/his preliminary findings and recommendations prior to writing the final project deliverables and strategic plan.
7. ACLU-VA will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected will provide the organization with ongoing coaching and implementation support as needed, per letter of agreement.

Evaluation Criteria:

In awarding a contract for consulting services to develop a long-range strategic plan for the organization, ACLU-VA will examine a number of factors and criteria will include:

1. The extent to which the proposal addresses the stated issues and clearly describes the scope of work.
2. Specific plans or methodology to be used to perform the services;
3. Qualifications and experience of consultant in providing strategic planning development;



4. Availability for work to be conducted during November, December 2021, and January 2022 with a strategic plan draft presented no later than at our February 2022 board meeting.
5. Project cost

SUBMISSION PROCESS AND PROCEDURES:

Please provide a complete written response to this RFP. Proposals should include:

1. A brief Executive Summary;
2. A description of the applicant's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking;
3. A clear explanation of how the consultant will address any management issues to be examined;
4. A list of project deliverables and timelines based on our February 2022 board meeting requirements.
5. A detailed budget that breaks out expenses;
6. Credentials and qualifications of key personnel who will take responsibility for working directly on this project, including three references;
7. Example(s) of a finished strategic plan created by your company.

Applicants must submit an electronic copy of the proposal.

Send completed proposals, by **November 5, 2021**, to Cynthia Moore at cmoore@acluva.org with the subject line: Strategic Planning Consultant.