



REQUEST FOR PROPOSALS: STRATEGIC PLANNING

Timing:

- **Issued:** December 11, 2019
- **Responses due:** December 24, 2019 by 9:00 AM
- **Interviewing and selecting candidates:** Week of January 6, 2020
- **Date of Strategic Planning Retreat:** January 27, 2020

About The Improve Group, SBC

The Improve Group is a woman-owned, full-service evaluation, research, and strategic planning consulting firm based in St. Paul, Minnesota. Incorporated as a social enterprise, The Improve Group is committed to helping local, national, and international organizations make the most of information, navigate complexity, and ensure their investments lead to meaningful, sustained impact. Read more at www.theimprovegroup.com

Our Need

The Improve Group is undertaking a strategic planning process in early 2020. We are seeking a consultant who will (1) facilitate a strategic planning retreat for our staff on **January 27, 2020**; (2) document the results of the retreat in a clear, concise way; and (3) provide some suggestions for next steps and implementation during a debrief meeting following the retreat.

We have these hopes for the process:

- That it gives our staff a focus for the upcoming year(s), with both the number and size of the things we are focusing on feeling exciting and manageable
- That aspects of our previous strategic plan and our ownership and management plans are incorporated/addressed as appropriate
- That our staff are engaged and co-create the focus, with a recognition that different people will have different ways of engaging (in writing, verbally, in groups, etc.)
- That the resulting product feels real and relevant to the experiences of our staff

We currently have a leadership meeting scheduled for February 3, which could be used for the debrief meeting; we could also find an alternative way/time to debrief.

History

Our previous strategic planning experience in 2016 was very positive. In an all-day, all-staff retreat, we came to consensus about the priorities and focus of our work.¹ We have used the plan to guide our efforts and investments since then. Thanks to changes in our organization and the broader environment, it is time to reset and refresh.

The Improve Group is guided by a [mission, vision and values](#). While staff haven't expressed a desire to revisit or redevelop these, we are open to processes that examine mission, vision and values and/or for this desire to emerge during this process.

Desired Qualifications

We are looking for a strategic planning consultant who is:

- Engaging and finds ways for staff with different preferences and styles to feel included in the process
- Thoughtful and analytical, helping us notice things we might be missing or underlying contradictions in our work
- Discrete, recognizing that we feel very passionate about our work and may feel vulnerable when discovering what's next

Anticipated Budget

We do not have a set budget for this work. However, cost effectiveness will be a factor in our decision, and we welcome your ideas for streamlining the project or managing costs.

How to Respond

Please send a brief proposal describing your recommended approach, qualifications, 1-2 references we could contact, anything we should consider that isn't included in this proposal, and your costs **by 9:00 AM on Dec. 24, 2019**. Proposals should be sent by email to Leah Goldstein Moses at Leah@theimprovegroup.com. You can also send any questions to the same address.

¹ We used Technology of Participation's Participatory Strategic Planning approach at that time and would be open to a similar approach again.