



**TOGETHER WE'RE GREATER
THAN ANY CHALLENGE.**

LIVE UNITED[®]

Request for Proposal

Strategic Planning Consultants



Give. Advocate. Volunteer.
unitedwaysuncoast.org



United Way Suncoast

PURPOSE

United Way Suncoast has initiated a Request for Proposal (RFP) process to identify professionally qualified consultants to guide and execute a strategic planning process for the development of a three-year strategic plan.

United Way Suncoast seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, have strong facilitation skills and have proven experience with nonprofit strategic planning.

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ABOUT THE ORGANIZATION

Our Vision

A community united to create better opportunities for all.

Our Mission

To provide leadership that improves lives and creates lasting community change by mobilizing the caring people of our communities to give, advocate, and volunteer. United Way Suncoast fights for the education and financial stability of every person in the communities we serve.

Core Values

Values are the principles that guide our actions both internally and externally. These are the United Way Suncoast values:

Integrity

Our actions support our mission with transparency.

Stewardship

We respect time, resources and generosity.

Diversity, Equity & Inclusion

We seek to understand cultural and community differences and embrace these differences through our words and actions

Innovation

We are agile, creative and adaptable to our community needs and changing environment.

Collaboration

We build relationships for the greater good.

United Way History

The concept of the United Way began in Denver, Colorado, in 1887. Four caring men – a priest, two ministers, and a rabbi – began to dream of greater service to others. They envisioned one organization that could include and unify many other organizations and, in the process, strengthen each of them.

It was a concept that proved its worth – and one powerful enough to reach Tampa 37 years later.

In 1924, the Tampa Welfare League was established. The original organization included 16 agencies: Boy Scouts, Children's Home, Girl Scouts, Humane Society, Milk Fund, Old People's Home, Red Cross, Salvation Army, Seaman's Institute, Tampa Urban League, Traveler's Aid Society, United Charities, WCTU Day Nursery, YMCA, YMHA, and YWCA. The first President of the Welfare League was C.C. Nott.

The goal for the first year's fundraising campaign, known as the Community Chest, was \$179,011.37. Mayor Perry G. Wall was the first General Campaign Chairman, and the slogan for the first drive was "Suppose Nobody Cared."

All campaign proceeds were divided among the above agencies, with the exception of \$30,000, which was allocated to the building fund for the Old People's Home. Over the years, the name Tampa Welfare League was dropped and the organization was simply known as the Community Chest. In 1956, the Community Chest became the United Fund, and in 1976 the United Fund became The United Way of Greater Tampa. Finally, in 1993, the organization changed its name to United Way of Hillsborough County, Inc.

In Pinellas County during 1932, the Community Chest was created with the goal of organizing and funding a coordinated plan to meet the social needs of the community. The original participating agencies were Salvation Army, YMCA, YWCA, Boy Scouts of America and the Florence Crittenton Home. The first year's campaign goal was \$30,000.

ABOUT THE ORGANIZATION (CONTINUED)

Despite the prevailing chaotic economic conditions, (President Roosevelt declared a federal banking holiday the day the first fundraising campaign kicked off), the campaign raised \$20,277.42. Local attorney Allen C. Grazier acted as General Chairman of the campaign. Through the war years, the annual campaign was combined with the United Defense Fund, and slogans referred to supporting the community and the home front. In 1956, the St. Petersburg Community Chest joined the South Pinellas County Chapter of the American Red Cross to form the South Pinellas United Givers. This organization joined the Clearwater and Dunedin funds in 1971 and formed the Pinellas United Fund, later known as the United Way of Pinellas County.

TAMPA BAY (2002 – 2012)

In July 2002, the United Ways of Hillsborough and Pinellas counties combined operations to better serve the Tampa Bay region. The new United Way of Tampa Bay funded nearly 70 Community Partner agencies located throughout the two-county area. In its first year of operation, United Way-funded programs helped one of every three people in Tampa Bay, totaling more than 600,000 people.

UNITED WAY SUNCOAST

In July of 2012, United Way of Tampa Bay and United Way of Sarasota consolidated creating United Way Suncoast – representing a four-county region including DeSoto, Hillsborough, Pinellas, and Sarasota counties.

In 2014, United Way Suncoast announced its five-year strategic plan to break the cycle of poverty by focusing on early literacy, youth success, and financial stability as its priority work.

In January 2017, Duke Energy Foundation announced a \$1 million grant to United Way Suncoast to benefit the Campbell Park community in South St. Petersburg, FL.

In 2017, United Way Suncoast and United Way of Manatee County merged to United Way Suncoast serving Desoto, Hillsborough, Manatee, Pinellas and Sarasota counties.

The concept behind the first joint-fund drive in Denver, Colorado, remains valid today. Yet the United Way Suncoast has evolved and changed dramatically over the years, largely because the organization is a flexible system that responds and adapts to changing social conditions and social needs.

PROJECT OVERVIEW

United Way Suncoast is seeking an external Strategic Planning Facilitator to work with our Board of Directors, CEO, staff, and volunteers in a deliberative, community-based process over the next several months, discussing and establishing the organizations' strategic priorities and needs.

OBJECTIVES

Our staff and board have identified a few areas of priority for this work and the person(s) directing it:

1. Emphasis on leveraging digital connectivity for much of the work, rather than in person meetings. (virtual meetings should be an option)
2. Focus and productivity in the process and its management so that internal and external stakeholders' time investment is appropriate and productive.
3. The ability to cull diverse viewpoints and opinions in order to develop concrete goals for the organization that are measurable with current data and resources.
4. Insight to help the organization develop objectives that are on-mission and have a clear plan for ensuring that the resources available can execute. If resources are not aligned, make suggestions for changes that will ensure targets are achievable.
5. Community-based so that we are building a plan based on community input and needs.
6. Data driven to support strategic planning decisions as well as a plan for transparently sharing the outcomes and progress to the goals as we execute.
7. Incorporate plan assessment mechanisms to consistently ensure we stay on track or pivot where necessary.

SCOPE OF SERVICES & DELIVERABLES

We expect the project to include:

1. **Productive Collaboration:** Work closely with the CEO and Board leadership to develop specific details of the planning process, including the timeline, logistics, and deliverables. Collaborative conversations should include the opportunity to provide suggestions and feedback with respect to the content and structure of both stakeholder engagement and board planning sessions.
2. **Stakeholder Engagement:** Engage a diverse group of stakeholders including board members, volunteer leaders, donors, community partners, community members and community leaders in and around the field to inform the strategic planning process. Stakeholder engagement may consist of focus groups, community listening sessions, surveys, or interviews. Your proposal should describe how you will engage stakeholders, the anticipated time an individual stakeholder might have to commit, and how you will provide the results of the stakeholder input as part of the process.
3. **Board Planning Sessions:** Facilitators are expected to conduct one strategic planning session with the Board Strategic Planning Taskforce and additional staff/other stakeholders. The target group for the Board Planning Session, not to exceed 20 people, would include a diverse group of those engaged in our work. It is projected that this could be a one or even two-day session. Other sessions could also be virtual with a few additional targeted stakeholders.
4. **Results:** Overall planning results should include affirmation, revision of vision and value statements as well as strategic goals, strategies/action steps, and key performance indicators.

PROJECT GOALS

United Way Suncoast envisions the scope of work to include the following:

Pre-planning

This stage requires the consultant to research and report the following in preparation for the strategic planning session. Items to be considered:

- Review of organization's history, interviews of current leadership team & staff and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities or concerns
- Research the level of need for the United Way's services in the community and an analysis of any areas where services provided overlap with those provided by other organizations
- Benchmarking the United Way with other similar sized nonprofits with a similar focus
- Interviews, surveys & focus group polling to receive partner & community input

Strategic Planning Creation

At this stage, the consultant helps United Way identify strategic goals and create an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:
 - Shared Mission and Vision
 - Objectives
 - Strategies
 - Tactics
 - Listing of responsible parties & roles
 - Results
 - Measurables
 - Resource Development strategies
 - Communication strategies

PROPOSAL FORMAT

Please outline your approach to incorporate the priority areas and scope of work/services (provided in this document) in a proposal addressing the items below:

1. Your proposed approach to working with our leadership
2. The services you would provide and deliverables including an estimated timeline
3. Resources and support needed from UWS staff/other consultants (including estimate of needed staff, Board, committee, and other volunteer/stakeholder time, if appropriate)
4. Statement of qualifications
5. Budget
6. At least two professional references

General information

The proposal should provide the name of the consultant, title, address, phone number, email address, and website, if one exists.

Consultant Qualifications & Roles

The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of related nonprofit work.

Some key qualifications that will be considered:

- Education (degree(s) and/or certificate(s))
- Experience in successfully developing strategic plans
- Knowledge of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience in creating a neutral environment for obtaining input
- Experience in gathering and utilizing data to drive the strategic process
- Ability to constructively challenge key stakeholders
- Experience in inspiring others to thinking innovatively
- Project management experience

PROPOSAL FORMAT (CONTINUED)

Work Plan

The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work.

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones & deliverables tied to the activities
- Proposed payment schedule tied to project milestones & deliverables

References

Information regarding each reference should include the individual's name, address, phone number and email address.

Previous Work Product

The proposal should include at least 1 sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

SCORING

Proposals will be reviewed and evaluated on the following criteria:

1. **Qualifications (35%)**
2. **Scope of Proposal (25%)**
3. **Work Plan (25%)**
4. **Budget (15%)**

OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of United Way Suncoast. All data remains the sole property of United Way Suncoast. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

**Proposals received after the deadline will not be accepted.*

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Tampa, FL 33609
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United Way Suncoast

PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for submission

1. **Closing Submission Date:** Proposals are due by 5:00pm on Monday, June 1, 2020
2. **Inquiries:** Inquiries concerning this RFP should be directed to unitedway@uwsuncoast.org.
3. **Conditions of Proposal:** All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by United Way Suncoast.
4. **Submission Instructions:** Proposals should be submitted/uploaded via the [Online Submission Form \(found here\)](#) before the closing submission date. Late or incomplete submissions will not be accepted. It is the responsibility of the bidder to ensure that the response is received by United Way Suncoast by the closing date and time. A response may be judged and excluded from further consideration if it is not received by the deadline or does not follow the format outlined above.
5. **Right to Reject:** United Way Suncoast has the right to reject all responses received in response to this RFP.
6. **Confidentiality:** If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.
7. **Notification of Selection and Timeline:** It is expected that a bidder will be selected within 2 to 3 weeks of the closing submission date, although this timeline is subject to change. United Way Suncoast reserves the right to cancel the RFP at any time. Please note that due to the nature of the project, there may be a gap between a consultant being selected for the project and their start date.

RFP Released: May 1, 2020
Proposals Due: June 1, 2020
Notification of Finalists selected for interviews: June 15-30, 2020
Selections Made: July 1, 2020
Contract signed by both parties: July 15, 2020
Project Begins: August 1, 2020
Desired Final Report: March 12, 2021
8. **Criteria for Selection:** United Way Suncoast will select the proposal based upon the one it feels will deliver the highest quality deliverable at the best value. Proposals will be initially reviewed by a selection committee designated by the CEO. Recommendation will be made by the committee to the executive board for final approval.
9. **Conflict of Interest:** The bidder must disclose any possible conflicts of interest that may result from the award of this contract or services provided under this contract. Except as otherwise disclosed in the proposal, the bidder affirms that to the best of their knowledge there is no actual or potential conflict between the bidder, a bidder's team member working on the project or its family's business or financial interests and the services provided under this contract. In the event there is a change in either interest or the services provided under the contract, the bidder will inform United Way Suncoast regarding the possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to United Way Suncoast's satisfaction or the bidder may be disqualified from consideration of this RFP.