



Request for Proposals for Strategic Planning Process

SUBMISSION DEADLINE: Friday, March 14, 2025, at 5:00pm

About Social Innovation Forum

Social Innovation Forum's (SIF) mission is to create positive social change in Eastern Massachusetts by engaging leaders, strengthening organizations, and building networks. We work closely with nonprofits, funders, and in-kind partners to ensure that resources and support are being directed to the organizations with the potential to make a meaningful impact on the communities they serve. SIF is simultaneously focused on ensuring that we support broader shifts toward equity within the social impact community. To date, SIF has directed \$61.9 million in cash and in-kind services to over 130 nonprofit organizations to help them scale and sustain their work.

At Social Innovation Forum, we know that effective solutions to our region's most challenging social issues exist and that often the people working on these solutions face barriers to accessing the funding, resources, and social capital they need to move them forward. Additionally, there are many people with resources, networks, and a genuine desire for positive social change who don't know the most effective ways to get involved and engage in advancing social impact work. According to ProPublica, there are more than 37,000 501(c)3 organizations in the state of Massachusetts.

SIF works at the intersection of these two groups, providing opportunities for them to connect, build relationships, exchange resources, and develop shared accountability. Thanks to over 20 years of cultivating authentic relationships with both nonprofits and funders, SIF occupies a unique position serving Eastern Massachusetts. We are a well-known capacity builder that has the trust of both nonprofits and funders, and we continue to partner with and foster a growing cohort of community organizations and funders.

Strategic Planning Process

Social Innovation Form seeks a strategic planning consultant(s) to support a robust strategic planning process and its subsequent implementation.

Founded in 2003 as a program of Root Cause, SIF became an independent nonprofit in 2015. In its early years, SIF operated with an almost startup-like mentality, expanding as opportunities arose to develop and pilot new programming. In 2019, SIF completed its first strategic plan that was largely staff-driven, with support from a few external volunteers and one MBA-level intern along the way.

The COVID-19 pandemic disrupted the execution of this plan less than a year into its implementation. The SIF team pivoted programming to a virtual environment for the better part of two years, navigating the complexities of supporting the nonprofits in our network while operating remotely. With the return to in-person programming in 2022 and 2023, came the realization that the strategic plan of 2019 largely held true but that the time horizon for it should be pushed out.

Additionally, SIF underwent the first executive leadership transition in the organization's history with the departure of founding director in December 2023. The Board helmed an executive search and a year-long transition process. In January 2024, SIF welcomed a new executive director. With a new leader in place, the time is right for the organization to set the course for its next phase.

Having done a strategic plan in-house before, the SIF team is aware of the time and energy involved in this approach. For this reason, the organization is committed to identifying a strategic planning partner who can facilitate the process. This will allow the staff to engage fully as participants and will bring external expertise and perspective into the process. SIF also seeks to create a process that is inclusive of a range of stakeholders – most crucially, the community-based organizations who are the beneficiaries of SIF's programs.

SIF began pre-planning for our strategic plan in 2024 and stepped into the formal planning process with an updated Theory of Change and the key strategic questions facing the organization. Now, we seek to identify a consultant(s) to facilitate a strategic planning process focused on addressing these questions about SIF's role as an intermediary within the nonprofit and funding communities, including:

- What is SIF's unique value proposition to the nonprofit and social impact sector in the current landscape?
- Why do funders and nonprofits become involved with SIF and how do we develop those relationships within our marketplace approach?
- What needs within the nonprofit and funder community are not being addressed?
- What revenue models would support our values and priorities?
- What are the specific measures of SIF's impact and success?

This pre-planning work is not intended to limit the actual planning process. We anticipate refining the strategic questions further with the board and with the strategic planning consulting firm once they have been hired.

Skills, Experience & Qualifications

We welcome proposals from individual consulting firms and firms who are partnering to submit a proposal. A strong candidate will have the following:

- Experience facilitating strategic planning processes for nonprofit organizations
- A demonstrated commitment to centering equity, inclusion, diversity, and belonging throughout the strategic planning engagement
- A proven history of engaging diverse stakeholders, including staff, board members, program participants, and community partners, in collaborative strategic planning efforts.

- Excellent project management skills, including a track record of producing deliverables on time and on budget
- Demonstrated research experience and the ability to translate qualitative and quantitative data into actionable strategic recommendations
- Knowledge of Eastern Massachusetts' social impact ecosystem is preferred but not required

Proposal Submissions

Consultants should prepare a proposal detailing their proposed approach by Friday, March 14, 2025. The proposal should include the following elements:

- Executive Summary: Please provide a summary of your organization, qualifications, and an overview of your firm's proposed approach for working with SIF on a strategic plan
- Statement of Firm Qualifications: Please include a statement of firm methodologies, qualifications, experience and description of your firm and its history. This response should specifically indicate the following:
 - the firm/consultant's current and historical expertise in providing strategic planning services;
 - staff qualifications, including names and titles of individuals who will be providing the strategic planning services and hold primary responsibility for contact and communications with SIF
 - please describe your qualifications/approach in the diversity, equity and inclusion space.
- Approach/Scope of Work: A proposed approach to SIF's strategic planning process, including timeline, key activities, and deliverables for each phase of the process; please also include proposed stakeholders to engage at each stage.
- Budget: A high-level budget not to exceed \$90,000 (inclusive of expenses)
- References: All responses must include references from at least 3 clients of the firm/consultant, and preferably clients who have utilized the firm on matters related to strategic planning services

Social Innovation Forum will review proposals and may reach out with questions or requests to discuss proposals. SIF will interview finalists in early April 2025. Work will start in July 2025 with a goal of having a final version of the strategic plan completed by March 2026.

Please submit proposals to Melissa Duggan, Chief Operating Officer, no later than Friday, March 14, 2025 at mduggan@socialinnovationforum.org. Please also reach out to Melissa with any questions in advance of submitting a proposal.

Evaluation Process and Criteria

SIF will evaluate each Response that is properly submitted. After submission and review of Responses, interviews may be requested. Selection of a Respondent to provide the Strategic Planning Services will be based on the following criteria: (a) Experience and qualifications of the firm in performing Strategic Planning Services for similar organizations; (b) Proposal's responsiveness to RFP requirements; (c.) Proposal's connection to SIF's Core Values; (d) Cost.