

YWCA UTAH REQUEST FOR PROPOSALS STRATEGIC PLANNING CONSULTING

PROPOSALS ARE DUE BY DECEMBER 1, 2023

THE RFP IS ALSO AVAILABLE AT <https://www.ywcautah.org/>

eliminating racism
empowering women
ywca

Utah

322 East 300 South
Salt Lake City, UT 84111
801-537-8604 TTY-711
ywcautah.org

PURPOSE

YWCA Utah (“YWCA”) seeks proposals from consultants experienced in strategic planning and knowledgeable about Utah, nonprofits, and diversity- and equity-centered practices to work with the Board of Directors and the YWCA staff on a new, three-year strategic plan.

Organization: YWCA Utah

Contact:

Liz Owens, lowens@ywcautah.org

Please cc Julianne Wallace, jwallace@ywcautah.org

ABOUT THE YWCA UTAH

YWCA Utah is dedicated to eliminating racism, empowering women, and promoting peace, justice, freedom and dignity for all.

YWCA Utah advances the well-being of women in Utah through safety, opportunity, and advocacy. Since 1906, the YWCA has designed its work to encourage women’s aspirations, protect and promote their rights, and meet their changing needs. The YWCA’s enduring belief has been that better lives for all women lead to stronger families, communities, and societies.

The YWCA is committed to advancing the well-being of women in Utah through safety – offering family violence services, opportunity – with leadership and education programs, and advocacy – as a voice for change.

Learn more about programming and services [here](#).

SCOPE OF WORK

The YWCA seeks to hire a consultant to guide in the development of a three-year strategic plan that will drive effective execution of our mission; optimize our organizational operations and resources; and prepare for a sustainable future. The planning process should include, but not be limited to the following tasks:

1. Project Management to complete the strategic plan on time and within budget.
2. Comprehensive situational analysis of peer organizations in Utah and organizations with similar program offerings.
3. Gather stakeholder input within the YWCA (e.g., Board of Directors, senior leadership team, and selected staff) and from external partners and community leaders.
 - a. This may include the use of surveys, interviews, focus groups, or other appropriate means.
4. Work with YWCA board to identify critical issues impacting mission, growth, financial operational success, reputation and philanthropy.
 - a. This may include broader strategic issues and opportunities for longer-term consideration, including what more could or should be done to better support the YWCA’s current and future focus on mission.
 - b. This may include reconsideration of certain programming or activities.

5. Establish key goals, strategies, and outcomes using the OKR framework to help YWCA address critical issues and opportunities.
6. Identify progress tracking metrics and benchmarks (i.e., an implementation plan) to measure progress and accomplish key goals, strategies, and outcomes.
7. Quantify expected financial ramifications of implementation of the new strategic plan.
8. Establish a framework and cadence to communicate periodic key metrics to support leadership decision making.
9. Establish a model to conduct cost-benefit analysis on initiatives designed to maximize the organization's performance and strategy.
10. Support implementation of a new tool to document and report OKRs for YWCA.
11. Facilitate a Board Retreat on February 24, 2024 and periodic meetings with the Strategic Planning Committee.

The final, written strategic plan document must include items outlined in scope of work and the following deliverables in detail:

- Key goals, strategies, and outcomes (leveraging the industry-wide OKR framework)
- Executable and pragmatic action items to achieve strategic plan (e.g., implementation plan over three-year period)
- Agreed upon tracking metrics to measure progress
- Financial impact analysis
- Recommended process for reviewing and updating Strategic Plan going forward

Some of the specific areas to be addressed by the strategic plan may include, but are not limited to:

- Provide a current snapshot of the YWCA, how have we been trending, and how should we evolve?
 - What are the current and likely external market dynamics/needs (e.g., competition, demographic, critical positions) which should inform future YWCA programs and offerings?
 - How can the YWCA best leverage existing assets and programs to meet community needs?
- What will be our differentiation – programmatically and for raising capital?
 - Analysis and recommendations for fundraising (e.g., its role and mix of sources) and other revenue strategies
 - How does YWCA consider financial sustainability in our budgetary and fundraising goal setting and planning?
- How does YWCA preserve and advance our market reputation, particularly as it relates to eliminating racism within our community?

PROJECT TIMELINE

- RFP response period: November 1, 2023-November 30, 2023
- Proposals due: December 1, 2023 by 5PM mountain in PDF format via email to Liz Owens and Julianne Wallace (contact information above)
- Consultant selected and notified: by January 15, 2024
- Project kick off: February 1, 2024
- Facilitation of Board Retreat: February 24, 2024
- Final Presentation of Recommendations for vote by Board: no later than June 20, 2024

QUALIFICATIONS

Women-identifying, Black, Indigenous, Latinx, AAPI, and LGBTQIA+ led or owned consulting firms are all encouraged to respond to this RFP. Qualified consultants should have the following experience and expertise:

- Demonstrated experience in leading strategic planning processes in the nonprofit sector
- Knowledge of or experience with Utah-based organizations, direct service organizations (e.g., domestic violence shelter and assistance), and equity and justice work
- Experience integrating financial forecasting and goal setting into the strategic plan
- Strong facilitation skills
- Ability to constructively challenge stakeholders
- Experience inspiring others to think innovatively

SELECTION PROCESS

The Strategic Planning Committee (the “Committee”) will review all proposals. The Committee may consider any factors it deems necessary and appropriate, including but not limited to price, quality of service, understanding of YWCA’s mission and local market considerations, extent to which the proposal addressed the contents of this request, staffing capacity, and availability during the proposed timeline. The final decision rests with the Strategic Planning Committee.

PROPOSAL FORMAT AND CONTENTS

Please provide a complete written response, in PDF format to this request. In responding to this request, please provide the following information:

- A brief summary of the proposal with suggested timeline and milestones.
- Specific plans or methodology to be used to perform the services.
- List of project deliverable(s).
- Qualifications and pertinent experience of each key person who will work on the project, including three (3) references from other strategic planning clients served.
- Proposed budget, including expected hours to be worked, breakout of expenses, and total cost(s).

OWNERSHIP AND CONFIDENTIALITY

All intellectual property provided in connection with this engagement will become property of YWCA Utah. All original data remains the sole property of YWCA Utah. The consultant engaged by YWCA Utah shall further agree to keep the information related to all contracts with YWCA Utah in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information learned through its dealings with YWCA Utah.

CONFLICT OF INTEREST

Consultants must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the contract services. Except as otherwise disclosed in the proposal, each consultant should affirm that to the best of its knowledge there exists no actual or potential conflict between the consultant for consulting, the consultant’s project manager(s) or its family's business or financial interest ("interests") and the services provided under the contract. In the event of any change in either interests or the services provided under the contract, the consultant

will inform YWCA Utah regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to YWCA Utah's satisfaction or the consultant may be disqualified from consideration under this RFP. As used in this section "conflict of interest" shall include, but not be limited to, the following:

- Giving or offering a gratuity, kickback, money, gift, or anything of value to a YWCA Utah official, officer, or employee with the intent of receiving a contract from YWCA Utah or favorable treatment under a contract.
- Having or acquiring at any point during the RFP process or during the term of the contract, any contractual, financial, business or other interest, direct or indirect, that would conflict in any manner or degree with the consultant's performance of its duties and responsibilities to YWCA Utah under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
- Currently in possession of or accepting during the RFP process or the term of the contract anything of value based on an understanding that the actions of the respondent or its affiliates or interests on behalf of YWCA Utah will be influenced.