

**NEW ENGLAND FOUNDATION FOR THE ARTS**  
**REQUEST FOR PROPOSALS (RFP)**  
*Consulting Services for Strategic Plan*

**Summary**

The New England Foundation for the Arts (NEFA) is seeking proposals from qualified consultants (or consultant teams) to lead an organizational strategic planning process, resulting in a new three-year strategic plan (December 2017 – December 2020) that sets long-term values but focuses action priorities for 2018 and 2019.

The New England Foundation for the Arts invests in the arts to enrich communities in New England and beyond. NEFA accomplishes this by granting funds to artists and cultural organizations; connecting them to each other and their audiences; and analyzing their economic contributions. NEFA serves as a regional partner for the National Endowment for the Arts, New England's state arts agencies, and private foundations.

**Project Background**

In 2013, NEFA released a five-year strategic plan for the FY14 – FY19 period. Over the last three years, NEFA appointed a new Executive Director, Cathy Edwards; elected eleven new board members; and made changes to the organization's leadership and program structures. The organization seeks a new plan that fully reflects the goals and priorities of the organization's new leadership, addresses the issues and needs of NEFA's partners and constituents, and sets benchmarks or metrics to evaluate the organization's progress and success in meeting identified goals.

As an outcome of the existing plan, NEFA launched a series of program evaluations looking critically at the organization's New England Programs and creative economy portfolio (2015) with constituent focus groups from the six New England states; the National Dance Project (2016) with input from hundreds of dance artists and presenters through interviews, focus groups, and surveys; and the National Theater Project (2016). In November 2016, NEFA closed a survey of New England's creative sector, gathering over 1200 responses from artists and creative workers in the region. Results and learnings from this work are due for publication in June 2017. Additionally, NEFA has committed to dedicating resources to staff-wide training and an assessment of equity, diversity, and inclusion in the organization and its practices.

It is NEFA's intent to conduct a new strategic planning process that builds on the momentum of this ongoing evaluation work, reflects the goals and priorities of new leadership, incorporates NEFA's work toward more equity, diversity, and inclusion, and addresses the opportunities and risks present in a changing arts landscape. NEFA has established a Strategic Planning Task Force made up of staff and board members, and will engage an independent planning consultant to shepherd this process. The selected consultant will work with this group to develop and write a new strategic plan with more specific goals and benchmarks to guide the organization in its next three years.

**Project Description and Scope of Work**

The strategic plan will include goals and measurable objectives, and will meet organizational needs for the next three years. The successful consultant/firm will manage and direct the strategic planning process, including:

- A. Reviewing NEFA's existing plan and ongoing program evaluations to assess progress and identify immediate and long term priorities
- B. Gathering and synthesizing comparable plans from peer institutions
- C. Conducting interviews with NEFA's leadership team and major stakeholders
- D. Facilitating discussions with the Strategic Planning Task Force and NEFA staff and board members to surface critical questions, aspirations, and opportunities
- E. Incorporating learnings and related goals from NEFA's equity, diversity, and inclusion trainings and assessment into the organizational plan

- F. Preparing a preliminary findings report, making a presentation, and leading a discussion with the NEFA's full Board of Directors at the organization's annual retreat June 22-23 in Stockbridge, MA
- G. Identifying clearly attainable, measurable goals, objectives and timelines within NEFA's vision and mission, with consideration to how the plan will be implemented, communicated, and evaluated
- H. Drafting the final plan for approval by the NEFA Board at its meeting in October 2017\*

### **Selection Consideration**

All proposals will be reviewed by the Strategic Planning Task Force and their selection of a finalist will be based on the following:

- Demonstrated knowledge, skills, and experience in conducting strategic planning projects for public/nonprofit arts agencies and organizations
- Experience working with organizations engaged with increasing integration of equity, diversity, and inclusion in operations and practices
- Methodology for carrying out tasks in the scope of work
- Reasonable proposed fees outlining budget and including cost breakdown and due dates of payments
- Excellent written and oral communication skills including writing/strategic plan samples from other organizations
- Positive references

### **Timeline and Completion Date**

NEFA anticipates beginning the process in March 2017 with a deadline of September 2017 for completion of the draft plan for approval by the Board of Directors at their October 2017 meeting. This is an aspirational, but not definite, timeline. Proposals should include a detailed timeline for completing the project. **Proposals and all supporting documents are due by February 1, 2017.**

Those interested should send the following six items by email to [strategicplanning@nefa.org](mailto:strategicplanning@nefa.org) and should include the subject line "NEFA Strategic Plan Consultant Proposal"

- *Proposal* – please detail your interest in the project, outline approach to strategic planning, and highlight relevant past experience on similar projects. It should include a brief statement of the consultant's/firm's philosophy toward strategic planning and the firm's approach to be used for this project
- *Description of past projects* – include strategic planning experience with budget sizes of past projects.
- *Qualifications* – submit one résumé for each team member with names, qualifications, and related experience of the lead and support personnel
- *Cost proposal and timeline* - include a timeline and cost proposal for the development of the strategic plan, based on the above description. Please include hourly rates for key personnel
- *3-5 References* – preferably from clients/previous projects with a similar timeline or scope
- *Writing Samples*

### **Terms and Conditions**

NEFA's Strategic Planning Task Force will review responses to this RFP with the aim of obtaining the best value to complete the project. NEFA reserves the right to request such additional information as it may deem relevant from any respondent. NEFA reserves the right to amend, correct, or otherwise modify this document or the RFP process at any time. NEFA reserves the right to accept, reject, or negotiate further any proposal received from any respondent. Neither this RFP nor any communication from NEFA concerning any respondent shall constitute any contractual obligation of NEFA until a legally enforceable contract is executed by NEFA and a contractor.

### **Information**

For questions, please contact Steven Fenton at [sfenton@nefa.org](mailto:sfenton@nefa.org) or 617-951-0010 x 243