

Request For Proposal (RFP) For Strategic Planning Services

Deadline for Submission: June 15, 2021

PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead the Sojourner Truth Academy Board of Directors, staff, and key stakeholders through a long-range, 5-year strategic planning process.

Specifically, Sojourner Truth Academy (STA) is seeking a consultant/company to provide the following services:

- Work with a Strategic Planning Team, composed of Board Members, staff, community stakeholders, and partners to articulate a clear strategic plan for STA for 2021-2025. This plan should identify organizational and financial objectives for the organization to pursue over the next 5 years in pursuit of its mission. The current school is not meeting scholar academic needs and the bulk of the strategic plan should focus on using the healthy financial position; strong community brand; and teacher led program structure to leverage accelerated academic growth.
- Review Vision Statement and Mission Statement. Make sure they are consistent with best practice and focus on scholar academic needs
- Identify internal and external stakeholders, with a focus on inclusiveness across demographics (grade levels; race/ethnicity; employee type; special programs etc.)
- Develop a timetable of implementation with specific measurable benchmarks, objectives and tasks to be accomplished to achieve goals. Identify clear, measurable outcomes for how to measure organizational and strategic effectiveness, impact, and success.
- The timetable must incorporate our authorizer's needs including:
 - This will either be a new strategic plan or an update and extension of
 - the current plan to reflect the new direction of academic programming at the school.
 - An initial draft of the 5-year strategic plan will be submitted to PUC by December 31st, 2021 and may include some longer term considerations for the school (i.e. changing neighborhood demographics, etc.). A finalized plan will be in place by the end of the 2021-2022 school year.
 - An update on the strategic plan's progress will be included in authorizer

reporting from FY22 and FY23.

- Establish a framework and process for the organization's leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
- Facilitate all meetings and provide leadership, direction and expert consultation and advice related to the development of an effective strategic plan, including successful implementation.
- Deliverable should be a clear, easily consumed, strategic planning roadmap, accompanied by a strategic planning timeline, implementation and evaluation methodology in digital format.

BACKGROUND INFORMATION

Overview of the Sojourner Truth Academy:

- Is a not-for-profit organization
- Currently operates a single PK-8 school in Minneapolis, MN
 - Has proud North Minneapolis roots since opening in 1999 and is deeply connected to the local African American and Hispanic communities
- Has a budget of approximately \$8.1 mil
- Has a total staff of approximately 70, with a teacher led academic program
- Has a strong, experienced, high-quality [partners across the community](#)
- Does not have an established PTO or PTA organization
- **Has opportunities to establish** greater collaboration with parents across grade levels
- Oversight is provided by an active board of directors committed to the mission of serving students
- Additional information can be found at <https://sojournertruthacademy.org/>

The mission of the Sojourner Truth Academy

The mission of the school is to prepare children for the future by building confidence and a strong sense of self-worth through small classrooms and an open, safe, family-like environment. STA supports families by embracing change when necessary for the good of the children and serving as a bridge to the community. Staff at STA is dedicated to and held accountable for providing a learning experience that is culturally relevant, challenging and fun.

The vision of Sojourner Truth Academy

Sojourner Truth Academy (STA) is passionate about helping children achieve academic and social success in a community of high expectations where each child is valued.

SCOPE OF WORK/MANAGEMENT ISSUES

Scope of Work:

1. Review current Vision and Mission statements
2. Determine financial sustainability, fund balance use; addressing student recruitment and retention; fundraising; parent involvement development, and larger, longer term community trends (neighborhood demographic changes, building capacity and available etc.)
3. Provide for continuous process improvement in internal operations
4. Understanding and responding to the current landscape with regards to charter schools in Minnesota and preparing for the future trends in charter school education
5. Public relations and marketing of the organization as a whole
6. Fundraising plans, including types of campaigns, where to begin, how to set goals

GLOBAL PROJECT REQUIREMENTS & TIMELINE

1. STA is seeking proposals from applicants who are capable of addressing all of the above stated management issues and who can provide additional expertise to fulfill the scope of the project in collaboration with the organization and the community it serves. Primary focus needs to be placed on improving school academic performance.
2. While STA understands that completing this project requires significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables (e.g. writing organizational assessments, writing the actual strategic plan, etc.). The staff will not be expected to be involved in writing work project products or final project deliverables.
3. Applicants are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements for all activities involving their participation. A demonstrated ability to stay on time is required. .
4. Proposals must include a clear description of the applicant's plan to complete all of the project components (i.e. in what order will the projects be completed, how long each component will take to complete, etc.)

5. Applicants must include in their project timelines "check-in" points for STA administration and board to be provided with project status updates. As work products/deliverables are completed prior to the established check-in points, applicants will be required to send STA and these materials to facilitate the status update meetings and/or Zoom calls. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/call, sending out meeting invites and writing meeting minutes.
6. In addition to the check-in meetings and/or conference calls, the applicant will be expected to present a status update on her/his preliminary findings and recommendations prior to writing the final project deliverables and strategic plan.
7. STA will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected will provide the agency with ongoing coaching and implementation support as needed, per letter of agreement.
8. Final Report should be composed in such a manner as to be easily understood by a variety of readers. It is expected that the plan will make appropriate use of graphics and visuals. Appropriate files types would include but not be limited to PDF, slides, or video.
9. It is expected that the total cost for this project will not exceed \$10,000. If the design and production of the report entails additional costs, you may include that as a separate line item.

EVALUATION CRITERIA

In awarding a contract for consulting services to develop a long-range strategic plan for the organization, STA will examine a number of factors and criteria will include:

1. The extent to which the proposal addresses the stated management issues and clearly describes the scope of work.
2. Specific plans or methodology to be used to perform the services.
3. Qualifications and experience of consultant/company in providing relevant strategic planning services

4. Availability for work to be conducted during July-December 2021 with a strategic plan draft presented to the STA board no later than at their June 2021 board meeting, June 15, 2021
5. Evidence of ability to stay on project timeline.
6. Usability and innovation of the final product proposed for communication of the Strategic Plan.
7. Project cost; it is expected that the total project cost would not exceed \$10,000. If the design and production of the report entails additional costs, you may include that as a separate line item.

APPLICATION PROCESS & PROCEDURES

Please provide a complete written response to this RFP which is double-spaced and does not exceed 15 pages.

Proposals should include:

1. Title page
(1 page)
2. Executive Summary
(1 page)
3. Methodology: A description of the applicant's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking
(approximately 4 pages)
4. Timeline: A list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion
(approximately 3 pages)
5. Budget: A detailed budget that breaks out expenses
(approximately 2 pages)
6. Personnel: The credentials and qualifications of key personnel who will take



responsibility for working directly on this project, including three references (approximately 2 pages)

7. Report: A description of the format of content of the final report (approximately 2 pages)

Please attach 1-2 example(s) of a finished strategic plan created by your company.

Applicants must submit one (1) electronic copy of the proposal.

Please note that STA will not return any proposals it receives and will not reimburse applicants for any costs they incur in developing their proposals.

Send completed proposals, by June 15, 2021, to Pam Young, Board Chair and Julie Guy, Executive Director at peadi@msn.com and jguy@sojournertruthacademy.org respectively