

[Public Health Institute](#)

**Strategic Planning Consultant Services**

**Request for Application (RFA)**

July 23, 2024

**Background:** The Public Health Institute, which works to advance health equity and wellbeing of individuals and communities at the local, state, national and global level through our work as a program intermediary and implementer, thought leader, and catalyst, is seeking consultancy services in the development of our next strategic plan. This strategic plan will inaugurate a new chapter in PHI's 60-year history with transition to a new President & CEO in 2024 following a long-time legacy leader and in the post- pandemic context for the field of public health. More information about PHI can be found on our [website](#).

The PHI governing body has set the expectation for the new President & CEO to develop a vision and forward-looking strategic plan that builds on both PHI's known strengths and new, fresh approaches that bring focus and achieve clear impact to advance the organization's mission. The Board's Strategic Planning Committee has also emphasized the need for developing an *actionable* strategic plan that can be executed effectively in the context of the organization's resources (human, financial, programs and partnerships) and capabilities.

PHI envisions the strategic planning process taking place over the next year, with adoption of a new strategic plan by the PHI governing body in mid-2025. Pre-planning work and information and insight gathering with internal partners and some external partners has been initiated by the new President & CEO.

**Process and Timeline:** PHI is seeking to procure an experienced strategic planning consultant, with expertise in advancing health equity and organizational leadership, and preferably with experience in public health, to support the development of PHI's new strategic plan.

- July 23, 2024: Release of Request for Application
- August 14, 2024, COB: Responses to RFA due.
- Week of August 19-23, 2024: Interviews with selected respondents.
- By August 30, 2024: Anticipated selection of strategic planning consultant.
- September 2024: Contract in place and kick- off of work.

Additional information about RFA response requirements is below.

**Scope of Work:**

**1. Project Leadership and Design**

- a. Lead, project manage and advance the overall strategic planning process, working in partnership with the President & CEO and Executive Vice President.
- b. Design the process and approach for development of the strategic plan, working in partnership with the President & CEO and Executive Vice President. Structure and sequence steps for arc of a process to lead toward a fresh, thoughtful, impact-oriented, focused, actionable strategic plan.

## **2. Execution of Process**

- a. Lead, plan, and manage a process of understanding the external context through gathering inputs, information and insights related to the public health and health field landscape and the landscape of current PHI programs and research and programmatic strengths.
- b. Facilitate a set of dynamic, thought-provoking strategic planning activities that get at the depth of key challenges and opportunities and allow for exploration of key issues, potential strategies, and goal areas that ultimately lead to advancement of plan development and setting of priorities.
- c. Conduct activities with a range of internal and external partners such as surveys, individual interviews, focus groups, facilitation of working groups, organization of roundtables and/or workshops, and leading of planning meetings.
- d. Facilitate and help lead us through the hard conversations from everything that's possible and good to do to what we are going to focus on in this plan. Provide reflection, insight, and approaches to help the CEO, executive team and Board weigh opportunities, options, implications, and trade-offs of strategic choices.
- e. Synthesize findings from various process components. Write internal reports of insight and information gathering phase findings, task force reports, and other process components for development of plan.
- f. Provide thought partnership, sense making, insight and perspective to the President & CEO, executive leadership team, and Board as part of the planning process and final development of a strategic plan.

## **3. Produce Final Strategic Plan**

- a. Develop and write draft strategic plan, with process for review and feedback.
- b. Write final strategic plan.
- c. Provide expert consultation to executive and management team in development of work plan, including timeline and metrics, to guide effective implementation of the strategic plan.

The project is expected to be conducted September 2024-September 2025 with a budget in the range of \$150,000-\$200,000.

**Application/Response Requirements:** Application responses should include the components below, not to exceed 10 pages total. Application responses are due Wednesday, August 14, at 5 pm pacific time and should be sent to Jennifer Lucas, Executive Assistant to the President & CEO, at [jlucas@phi.org](mailto:jlucas@phi.org)

- Summary of your philosophy and approach to strategic planning with nonprofit organizations.

- Summary of the expertise, experience, and key strengths you would bring to working with PHI in development of its new strategic plan, including specifically in the public health and broader health fields.
- Planned approach to the proposed scope of work with PHI, including:
  - core components of work you would propose to do.
  - approaches, tactics, methodologies, processes you would utilize for various aspects of the work and with various internal and external stakeholders.
  - high level timeline and sequencing for key phases and components of the work.
  - other elements to your planned approach you'd like to include or highlight.
- High level budget, including hourly rates and/or proposed payment for phases/components of work.
- Brief biography and summary of experience and areas of expertise for you and any other people you would involve in the work, including a brief explanation of roles envisioned for each person if applicable.
- Brief summary of three engagements with nonprofit organizations that illustrate your work helping them to develop a strategic plan.