

# evanston!communityfoundation

## **Request For Proposals**

### **Strategic Planning Process**

**Due Date: December 15, 2019**

The Evanston Community Foundation (ECF) seeks an experienced consultant or consultant team to lead the next visionary strategic planning process. The consultant will work closely with the board and staff, led by the executive committee during this project. The consultant will also work closely with a fundraising consultant in the beginning phases of the planning process.

### **History of Organization**

The Evanston Community Foundation (ECF) is an established and robustly endowed organization that has served residents of Evanston since 1986. The Foundation's concentration of unrestricted assets supports its commitment to serve the Evanston community in collaboration with 200+ nonprofit organizations, as well as through foundation-initiated projects that ECF incubates with partner organizations. The Foundation currently operates with 6 full time and 5 part time staff. ECF's annual budget in 2018 was \$1.3 million with 40% of the budget coming from endowment draws and fees on funds; funding sources at the core of ECF's mission.

### **Over the last few years the Foundation's mission and goals have focused on creating:**

- An Evanston that is inclusive and equitable for all
- An empowered and engaged community that collaborates across sectors to define problems and work on solutions
- A thriving nonprofit sector
- The long term sustainability of the Foundation

### **The Foundation focuses on:**

- Building endowments for current and future opportunities
- Fostering private philanthropy
- Focusing the impact of collective giving
- Allocating grants; and
- Providing leadership training

### **Background & Context for Consideration**

The Foundation is completing a three-year strategic plan focused on the goals listed above. Moving into the new decade the Foundation will need to focus on its long-range vision and sustainability. With a history of successfully completing multiple fundraising campaigns and fostering the value of nonprofit collaboration across Evanston, the Foundation is looking ahead to 2020 with excitement and endless possibilities for how the organization can increase its impact across all of Evanston.

Within the past four years ECF made some capacity investments enabling the organization to be more visible in community, more accessible to partners, and engaged beyond the nonprofit sector. The ECF leadership team is well connected throughout Evanston and is often sought out to lead or participate in communitywide initiatives.

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With the Foundation's most notable communitywide initiatives having taken place over a decade ago there is now an opportunity to envision where ECF should make its next large impact.

Central to the Foundation's ability to foster impactful change throughout the community is the financial sustainability of the organization, evidenced by the board's desire to enter into an endowment building campaign. The strategic planning process must support this endeavor.

### **Purpose of Consultation**

The goal of this consultation will be the development of a 3-5 year plan that will address the following areas in our operations and sustainability framework:

Community Impact – ECF programs have the benefit of being reflective of the needs of Evanston. In this space the organization plays a critical role in addressing the pressing issues and compelling opportunities that arise for the Evanston community, working with and helping to strengthen nonprofit organizations. The Foundation is in need of a community analysis to identify the greatest area(s) of need and impact. Central to our mission, we need to develop goals and strategies that foster an inclusive, equitable and vibrant community. In order to do this we need to obtain data and evaluate the organization's capacity to address challenges.

Financial Sustainability – In 2013-14 the organization underwent an analysis to evaluate capacity for a capital (endowment) campaign and decided the organization was not in a position to mount a successful campaign. Since that time the Foundation has focused on increasing staff and technology capacity to manage the current areas of fundraising and add the ability to manage an endowment campaign. The main focus for fundraising is still on annual fund giving, while raising major gifts for endowment started to have more visibility in 2015. On the heels of a few successful, targeted major gift fundraising initiatives, the foundation sustains operations through multiple resources: events, appeals, and major donor cultivation. The organization has two full-time development staff and one part-time communications and marketing staff and is supported by consultation services with a focus on long-term stability. Now is a good time to revisit an exploration of other streams of revenue, including building the endowment to fully support the organization's annual operations budget of \$1.3M. This includes assessing our business model and assuring the organization is well prepared to increase endowment and decrease reliance on annual fundraising.

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#### **Scope of Work**

Design and execute a collaborative process with ECF's Board and management to identify, work through and prioritize ECF's strategic and (major) tactical priorities to guide the foundation for the next three to five years.

Work with the staff to complete a community need analysis or scan; inclusive of interviews, surveys, and lead focus groups.

Lead board & staff planning retreat, allowing for engagement with a fundraising consultant for endowment campaign visioning.

Prepare report(s) and present the strategic plan: including implementation, on-going evaluation and plan maintenance.

Prepare workshop or training outline for onboarding new and existing staff and board members about the plan.

#### **To Submit Qualifications**

Consultant proposals should provide:

1. Timeline for the strategic planning process.
2. Description of the stages of work and related work products at the end of each stage (i.e., Organizational management assessment, situation analysis or SWOT identifying critical issues to be addressed, draft plan, final plan), and the specific tasks that will take place in each stage (i.e., # of interviewers, surveys of agencies served by ECF, meetings with ECF staff/board team, retreat, drafting sessions etc.)
3. Outline and overview of initial meeting.
4. Description of the division of labor between consultant and ECF staff for each stage/task.
5. Budget noting: a) an estimated cost for each major stage of the strategic planning process; and b) any anticipated project expenses (i.e., travel printing, etc.) that are needed.
6. Two references from prior strategic planning projects with foundations or non-profits similar to ECF should be included in the proposal (with contact information), and samples of strategic and organizational plans that resulted from these consultations should be included.

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## **Selection & Process Timetable Outline**

Proposal Submission Date:	December 15, 2019
Interview of Consultant/s by ECF:	January 2020
Selection of Consultant/s:	January 2020
Start Date for Consultant Work with ECF:	February 2020
End Date for Strategic Planning Process:	(Flexible) August/September 2020

Please send your proposal and reference information as a PDF to the attention of:  
Monique B. Jones President/CEO Evanston Community Foundation  
[ECFsearch@evanstonforever.org](mailto:ECFsearch@evanstonforever.org)