

## Request for Proposals: Strategic Plan Facilitation

December 6, 2021

### 1. Summary

Sustainable Agriculture and Food Systems Funders (<https://www.agandfoodfunders.org/>) seeks a qualified strategic planning consultant to work with the SAFSF Board of Directors, staff, members, and broader network to facilitate the development of a strategic plan that will guide the organization beginning in 2023 for a period of 3-5 years. The project duration is late February through October 31, 2022.

**The deadline for proposal submissions is January 10, 2022 at 5 pm Pacific.** Should you have any questions, you may reach out to Renee Catacalos at [renee@safsf.org](mailto:renee@safsf.org) or (805) 567.7344.

### 2. About SAFSF

SAFSF is the country's largest philanthropic network dedicated to sustainable agriculture and food systems, with more than 100 organizational and individual members, including grantmakers, lenders, and investors, who we collectively refer to as funders. Formed in the early 1990s, SAFSF has been staffed since 2003, when now-Executive Director Virginia Clarke was hired as part-time network coordinator. Based in Santa Barbara, California, we now have 9 staff who work remotely across five states. SAFSF left fiscal sponsorship and incorporated in 2018 becoming stand-alone 501(c)(3).

SAFSF is governed by a volunteer Board of Directors, which is responsible for oversight of the network's programming, finances, strategic vision, and general operation.

Our **vision** is that all resources invested in food and agriculture systems enhance our collective well-being. Our **mission** is to amplify the impact of philanthropic and investment communities in support of just and sustainable food and agriculture systems. Our **values** of collaboration, equity, respect, stewardship, and integrity undergird the **three goals of our current strategic plan**:

1. Foster, grow and engage a robust and inclusive philanthropic and investment network to drive equitable systemic change toward our vision.
2. Demonstrate that SAFSF is the authoritative source on issues at the intersection of sustainable agriculture and food systems, public policy, and philanthropic grantmaking and investing.
3. Embody our values of collaboration, equity, integrity, respect, and stewardship in our work with members, employees, and partners.

### 3. SAFSF Strategic Planning Background

In 2017 and 2018, after more than a decade of allowing SAFSF's activities and staff to grow organically, our then-Steering Committee and staff spent nearly a year working through a wide range of questions about the direction SAFSF should take as it continued to evolve. The desire at the time was to decide what new activities and new directions SAFSF should undertake, not to define the direction for activities that had been the successful core of SAFSF's programming since the beginning.

The process resulted in the move to incorporate and become a stand-alone nonprofit, as well as the development of the 2018 Strategic Agenda, which defined Vision, Mission, Values, three Strategic Levers, and eleven Strategic Goals focused specifically on areas where the organization needed to shift and grow. The 2018 Strategic Agenda guided SAFSF's incorporation and establishment as an independent nonprofit, expansion of staff and organizational capacity to pursue policy advocacy strategies, widening of membership to include food systems investors, and recognition of communications as a core area of need for organizational growth.

In 2021, with the 2018 Strategic Goals nearly fully achieved, SAFSF needed a new plan and planning process that would continue to provide direction to a growing staff and evolving membership for the future. The 2021-2022 Strategic Plan, developed by SAFSF staff with input from our member committees and review by the Strategy Committee and the Board of Directors, retains the Vision, Mission, and Values defined by the 2018 Strategic Agenda, and adopts a more traditional plan format with the aim of better reflecting a wider range of SAFSF's current work. The 2021-2022 Strategic Plan was developed as a bridge plan intended to lead into the development a longer-term strategic plan to go into effect in 2023.

### 4. Purpose and Scope of Work

SAFSF seeks a consulting partner who will help design and facilitate an inclusive process of research, stakeholder outreach, and analysis that will deliver a clear and concise strategic plan that will move SAFSF forward in a stable, yet flexible way, with an eye to the future as we continue to evolve as an organization. The new strategic plan will take effect in 2023 and guide SAFSF through its next 3-5 years. The consultant will work closely with our six-member Strategic Planning Task Force, but will engage with our entire Board and staff, as well as members and others in our network through the planning process.

The "big picture" questions we want to explore include:

- What is our current value proposition and how might it change or be challenged in the future?
- How can we effectively measure and communicate the impact of the SAFSF network on the work of our members?
- How can we effectively measure and communicate the impact of our members' work in the field?
- How do we more fully embed our core values and our Commitment to Racial Justice into our work?
- Does our mission statement accurately reflect SAFSF of 2023 and beyond?

The primary deliverable is a high-level strategic plan with broad goals and objectives, providing direction and parameters for staff in the development of impact metrics and annual implementation plans. We anticipate the work to take place during the period of late February through October 31, 2022.

## 5. Desired Qualifications

SAFSF seeks a consultant with the following qualifications:

- Flexibility and an open mind to develop a framework that fits the organization, rather than fitting the organization into a pre-determined framework
- Experience working with multi-stakeholder networks
- Experience developing strategic plans that allow for flexibility and staff transitions at any level
- Familiarity with grantmaking and philanthropic investing
- Understanding of racial equity concepts and equity issues within philanthropy

We encourage proposals from businesses owned by women, people of color, Indigenous people, people from the LGBTQ+ community, members of the disability community and others.

## 6. Project Timeline and Milestones

Proposed timeline

- Late February – April: Consultant engages with Strategic Planning Task Force to refine project scope and workplan, conduct document reviews and begin stakeholder outreach
- May – July: Additional stakeholder outreach as needed; consultant facilitates analysis and synthesis of information gathered into elements of a draft strategic plan
- August – September: Revisions and refinement of draft based on input from Board and other stakeholders
- October: Final approval and adoption of 2023 Strategic Plan

Key 2022 milestones

- May 12 (virtual): Task Force and consultant present early findings and ideas on plan direction to full Board
- June 20-22 (in-person): SAFSF Forum in Kansas City – optional opportunity for input and engagement with members and the network
- August 16 (virtual): Task Force and consultant present draft strategic plan to full Board
- October 1: Final plan due
- October date TBD (virtual): Potential presentation to Board

## 7. Budget and Duration

The budget for this project is \$40,000 (exclusive of travel to the SAFSF Forum and related expenses if that is deemed to be desirable). We anticipate the project to launch in late February and to be completed by October 31, 2022.

## 8. Proposal Requirements

Your proposal of *no more than 5 pages* must include:

- Name, title, and brief description of experience as it relates to the SAFSF strategic planning project for each member of the proposed consulting team
- Description of your approach to strategic planning and your experience with networks and/or philanthropy
- Proposed scope of work and workplan, including deliverables
- Line-item project budget

In addition to the 5-page proposal, please include:

- Name and contact information (email and phone) for three references who can attest to the quality and responsiveness of your work. Include a brief comment about the context in which you know them.
- CVs and resumes of the project team

Proposals should be emailed to both Virginia Clarke, [vclarke@safsf.org](mailto:vclarke@safsf.org) and Renee Catacalos, [renee@safsf.org](mailto:renee@safsf.org).

## 9. Proposal Review and Selection

- **January 10** – Proposals must be submitted electronically by **January 10, 5 pm Pacific Standard Time** to [vclarke@safsf.org](mailto:vclarke@safsf.org) and [renee@safsf.org](mailto:renee@safsf.org).
- **Week of January 31** – Brief interviews with top candidates.
- **February 7** – Decision notification
- **Week of February 21** – Kick-off meeting with selected consultant

The following criteria will be used in reviewing consultant proposals:

- Demonstrated ability to leverage proven strategic planning models while respecting an organization's culture and identity
- Understanding of and experience working with networks or similar types of multi-stakeholder organizations
- Clarity of proposal and achievability of workplan