



## Strategic Plan Request for Proposal (RFP)

### Introduction

Philanthropy, at its best, is an inventive and collaborative enterprise. It involves harnessing resources, know how, and the capacity of others. Working together and sharing ideas resulting in better, faster, and deeper lasting impacts throughout our communities. As Bill Gates, humanitarian, philanthropist, and founder of Microsoft, said, “Effective philanthropy requires a lot of time and creativity—the same kind of focus and skills that building a business requires.”

So how does philanthropy collaborate? How does it work together and share ideas? In Southern Wisconsin, the answer is the Community Foundation of Southern Wisconsin (“CFSW”)—the infrastructure for building sustainable, impactful funds with the intention of being invested as long-term endowments to provide philanthropic support across the nine southwest counties of Wisconsin (Walworth, Rock, Green, Lafayette, Sauk, Iowa, Grant, Vernon, and Crawford)

CFSW is a tax-exempt public charity with a primary purpose of building a permanent source of charitable funds, and advancing philanthropy by assisting individuals and families, foundations, groups and businesses, in fulfilling their philanthropic goals and objectives through charitable giving. CFSW funds are professionally managed and invested to provide perpetual assets over time. Additionally, CFSW and the various community fund advisory boards, serve as community leaders on key community issues, stimulating community dialogue and decision-making to help define common goals and solve crucial problems. CFSW is a repository for the nine southwest counties of Wisconsin with more than 700 charitable funds (consisting of community funds, donor-advised funds, scholarship funds, Excellence in Education funds, and nonprofit organizational funds) worth more than \$50 million. Each of these funds was created by donors to enhance the quality of life in Southern Wisconsin. We service these funds by managing the investment, encouraging and supporting additions, overseeing the disbursement of grants and scholarships, and managing the requisite government requirements.

- **To fulfill our mission, we provide services to:**
  - Charitable Donors, making a difference in their communities through their charitable gifts.
  - Non-Profit Organizations, including schools and governmental bodies, seeking support for projects and programs.
  - Students seeking scholarships.
- We assist donors by helping them create charitable funds to support the causes of their choice. “Donors” include individuals, organizations, and informal groups united for a common purpose. We also bring information about community needs to the attention of our donors.
- We assist non-profit organizations through our competitive grantmaking program which provides a variety of opportunities for these organizations to receive financial support. We also assist non-profit organizations in the creation of funds solely for the support of their organization. We hold a total of 42 grant cycles, due to the number of funds we hold.
- We assist students by serving as a scholarship resource to over 500 individuals for both high school graduates and older students. Each year the Community Foundation makes nearly 400 scholarship awards across the Southern Wisconsin region. Our scholarship listings are a valuable tool for students seeking support for post-high school education.

CFSW is at a critical inflection point. As we have recently celebrated our 25<sup>th</sup> anniversary year, we have also welcomed a new President and CEO, Wyatt Jackson. Wyatt brings an entrepreneurial orientation to challenge the status quo and is prepared to propel the organization’s impact to new heights. To that end, CFSW is undertaking a strategic planning process to determine what is next for the organization as we continue to build the infrastructure for sustainable, impactful philanthropy across our designated region and beyond. Other staff for CFSW include a chief financial officer, three donor service representatives (one was recently promoted to Director of Donor Services) covering 3 different regions (Rock/Walworth County, Southwest Region-Crawford/Vernon/Iowa/Grant Counties, Green/Lafayette Counties), Grants/Scholarship Manager, Marketing Manager (works remotely from home), and 4 part-time support staff. We have 3 offices currently, with the main office in Janesville, WI. The Director of Donor Services and 1 support staff in Monroe, WI, and 1 donor services representative and one support staff in Platteville, WI.

## Scope of Work

The Community Foundation of Southern Wisconsin is seeking a strategic plan outlining a clear path for our next 3 to 5 years, including goals, issues, programs, and other specifics that we expect will round out the plan.

Successful responses may approach the planning process using a multitude of methodologies. All methodologies will be thoroughly considered. The only requirement is the engagement of a wide range of CFSW stakeholders (board, staff, advisory boards for funds, grantees and others) in the process.

This suggested timeline will require a consultant that utilizes strong project management tools and possesses the ability to quickly bring teams to consensus.

### **Key Milestones**

<b><u>Key Milestones</u></b>	<b><u>Due</u></b>
Release RFI	November 6
Q&A period	November -November 25
Response due	December 2
Interview finalists	December & January
Choose consultant/facilitator	by January 22
Assessment of organization/stakeholders	January 22 – March 15
Strategic planning retreat including staff and board	TBD (April or May)
Plan delivered	June 15
Board meeting to approve plan	July 22

The selected strategic planning consultant will ensure that necessary research/assessment is completed to meet the project requirements. This project will have the use of our database and staff time to pull data and reports needed by fund types, grants made, scholarships awarded, donors reached, etc. Plus, CFSW expects that the plan might leverage insights from a survey of donors, grantees, staff and board members. In addition to the existing knowledge base, the selected strategic planning consultant will work with CFSW staff to complete the additional research required to ensure effectiveness of the plan.

## **Proposal Requirements**

The most successful RFP response will provide detailed information about the proposed strategic planning process, including a list of each step and, 1) how it will be executed; 2) who will be involved; 3) what the expected work product will be; and 4) any associated deliverables.

Successful RFP responses should be responsive to the project description above and provide information regarding potential 1) content or issues on which CFSW might focus; 2) program/structure to implement; 3) communities to develop; 4) future trends in the industry 4) mass marketing of CFSW and our services; and 5) other potential work that would be explored through the planning process.

Please explain what processes and resources the respondent will use to complete the work. Include specific research methods, analysis, and analytics to be utilized. Include examples of similar projects completed in the past, how those projects were executed, and what the key findings were. Explain similarities and differences between sample projects and the CFSW project, including the rationale for why the differences will occur. If possible, include a copy of the finished products in your response to this solicitation. Provide a list of references for similar projects in similar industry (if possible).

It is permissible to propose up to three service levels and deliverable options with separate prices for each. The fees suggested in the RFP process are for discussion purposes and will not be considered final. However, CFSW does ask that these estimates be made in good faith and represent the best estimate of cost.

The proposal may be no longer than 8 pages in 12-point font. Examples of prior work and other exhibits are not included in that page limit.

### **Contact**

Please submit responses and direct any questions to:  
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