

Request for Proposals: Strategic Planning Consultant

March 15, 2023

Introduction

The Boston Preservation Alliance is requesting proposals from strategic planning consultants to conduct a far-reaching and inclusive input process to inform and create a Strategic Plan. We anticipate the plan will guide the organization through the next 3-5 years.

The selected consultant will be responsible for assisting the Alliance's staff, Board, and participating partners with the full scope of developing a Strategic Plan. The Alliance is soliciting proposals for these services in accordance with the terms, conditions and instructions set forth in this Request for Proposal. There is no expressed or implied obligation for The Boston Preservation Alliance to reimburse responding firms for any expenses incurred in preparing proposals in response to the request or for attending any meetings or conferences related to preparing or presenting proposals.

Background

The Boston Preservation Alliance is Boston's primary nonprofit advocacy organization that protects and promotes the use of historic buildings and landscapes in all of the city's neighborhoods. With 40 Organizational Members, 107 Corporate Members, and a reach of over 100,000 friends and supporters we represent a diverse constituency advocating for the thoughtful evolution of the city and celebration of its unique character. Through advocacy and education, we bring people and organizations together to influence the future of Boston's historic buildings, landscapes, and communities.

The Alliance works across the city of Boston, engaging with dozens of residents, advocates, elected officials, City leadership, and organizations on a variety of projects and initiatives. In the past, our work has been most concentrated in the downtown neighborhoods where development impacts are broader, but we have identified the need to play a more active role in outer neighborhoods where historic resources are increasingly threatened. We are interested in a strategic planning process that includes outreach to underserved neighborhoods to help us understand what role is most

appropriate for our organization, what partners are available to us, and how our mission might evolve to be most relevant and effective in our city.

As a non-profit organization with a 45-year history we are seeking to revamp our mission and branding to reflect and invite a more diverse audience that is representative of the city of Boston. Having recently completed a diversity, equity, accessibility and inclusion training hosted by YW Boston, we are more aware of the necessary changes we need to make to ensure we are expanding our outreach with equitable representation across our staff, volunteers, leadership, and community partners. The Alliance is intentional about expanding our scope of preservation work to include nontraditional and under-protected resources and strategic planning will guide our priorities, process, and partnerships, enabling us to demonstrate leadership in the preservation community in Boston and beyond.

Equity

The Alliance's mission is to protect places, promote vibrancy, and preserve the historic character of Boston. To enhance that mission we are committed to modeling and embracing diversity, equity, access, and inclusion through our leadership, staff, engagement, programming, and advocacy and in fostering and maintaining an inclusive environment with equitable treatment and access for all. The Alliance is predicated on beliefs and principles that preservation is about saving places that matter—places that consider, represent, and engage a wide variety of people. We also believe preservation is more than bricks and mortar—it is the people that define the history, culture, and character of our built environment. Our organization must actively welcome diverse program participants, members, directors, advisors, and staff. Our organization cannot achieve its mission without drawing upon the skills, talents, and perspectives of a broad and diverse range of participants. The diversity of viewpoints that comes from different life experiences and cultural backgrounds will strengthen our involvement, our deliberations, and our work. The strategic planning process will inform our work to better reflect these goals and commitments.

Goals

Through the Strategic Planning process, the Alliance strives to discuss and address the following:

- The possibility of creating an Open Call process for new Board members to expand the diversity of our leadership
- Utilizing our existing, but untapped, Board of Advisors
- Creating a Planned Giving program
- Creating additional income streams through new or expanded programs, events, and initiatives
- Acquiring office space in an under-served neighborhood, with the potential for ownership of a co-working space hosting other related nonprofits
- Expansion of our mission and advocacy work based on feedback from the community and the outcomes of our DEAI training
- Understanding how our current branding and messaging is received by the community and if we should pursue changing our name, branding, etc to better reflect the goals in our Strategic Plan
- Exploring if deficiencies, gaps, or shortcomings of our current work limit our effectiveness
- Any other concerns that may arise during the process

Anticipated Scope of Work

- Conduct a pre-meeting with staff and organization leadership to clarify expectations and desired outcomes
- Review relevant documents and outcomes from the Alliance's DEAI training
- Organize and facilitate meetings to encourage participation and gather insight regarding critical issues and priorities with Alliance staff and leadership as well as community partners and stakeholders
- Work with staff to ensure appropriate engagement and timely deliverables
- Provide a draft Strategic Plan for review and modify as needed
- Attend and present the final report at an Alliance Board meeting, and possibly at the 2024 Annual Meeting of Members

Proposal Requirements

The following information is required for the proposal submission to be considered:

- Firm name and address; contact name, title, phone number & email address
- Scope of Work including an outlined approach and strategy to complete the requested process and achieve the desired outcomes
- Identify the name and title of the primary consultant and any other key team members who will be assigned to this project. For each, provide a summary of qualifications and experience and any relevant references
- Cost estimate for the proposed Scope of Work, and any other project-related costs
- Number of meetings anticipated with Alliance Board/staff as well as stakeholder listening sessions or feedback opportunities
- List of 3 references and examples of similar projects

Eligibility

Consultants should be experienced in working with organizations in the development of a responsive and a long-term strategic plan. In addition, experience working with historic preservation organizations or nonprofits in related fields is preferred. The intent of the Request for Proposal is to garner proposals from qualified strategic planning consultants to work in partnership with our leadership, staff and community stakeholders.

Budget

The anticipated budget for this project is not to exceed \$35,000. The Alliances anticipates the project will be completed by the end of 2023.

Criteria

The Alliance will be evaluating proposals based on criteria such as:

- Expertise of consultant and supporting staff
- Experience in facilitating and writing strategic plans for small nonprofits with similar missions to the Alliance
- Understanding of the Alliance's mission and vision
- Positive references, especially from similar projects
- Experience and demonstrable success in integration of DEAI strategies into strategic planning with measurable outcomes

Project Schedule

Proposals must be received via email no later than 5:00 p.m. EST on April 3rd, 2023. Proposals received later than the date and time specified will not be considered unless previously arranged with the Executive Director. Questions may be sent by email or discussed with the Executive Director in a scheduled meeting.

Send Proposals and questions to Alison Frazee, Executive Director of The Boston Preservation Alliance, at afrazee@bostonpreservation.org by April 3rd, 2023.