**REQUEST FOR PROPOSAL DRAFT***This draft is based off a Strategic Planning consultant RFP, some RFPs may need to be scaled up or scaled down based on your organization’s needs*

**Request:**

The [ORGANIZATION NAME] requests proposals to engage a consultant to help [PROGRAM/PROJECT TITLE]

Formal Responses should be submitted electronically to the attention if [CONTACT PERSON, CONTACT INFORMATION] submitted no later than [DATE].

**Organizational Overview**

[BACKGROUND KNOWLEDGE]

Mission: [ADD TEXT].

Project Overview and Scope: [ADD TEXT].

**Minimum Criteria:**

[ADD TEXT].

**Questions** should be directed to: [CONTACT PERSON, CONTACT INFORMATION]

**Deadline** for submissions: [DATE]

**Proposal Guidelines and instructions**

* Before responding, please make sure you meet the minimum criterial listed above.
* You must respond to each item in the following section of the below instructions. Your proposal should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete accurate and reliable presentation. Please be brief and concise in your responses
* The [ORGANIZATION NAME] reserves the right, in its sole discretion, to reject any and all responses and to waive any irregularity or informality in any response. The [ORGANIZATION NAME] shall not be liable for any losses and/or expenses incurred by the respondents throughout this process
* The [ORGANIZATION NAME] cannot return any proposals or promotional materials

**SECTION A: CONSULTANT PROFILE**

1. Please provide your full name, your organization (if applicable), email address, and the mailing address, telephone number and website (if applicable) for your main office.
2. Please identify the key contact person(s) for all inquiries and communications regarding the selection process. Include the contact name(s) titles, address, telephone and email addresses.
3. Briefly describe your work and/or your organization including, but not limited to, the year it was founded, its history, its ownership structure, and its primary focus.
4. Please indicate the number of years your firm has been performing services similar to those that you seek to provide. Describe your work with any other nonprofits organizations
5. Please disclose any and all conflicts of interest you or your organization may have in serving as a consultant.
6. Describe any material litigation, regulatory or legal proceedings in which you or your firm or any of the principals are or have been involved over the past five years
7. List and describe the professionals and support staff that would be assisting you in the consulting process.

**SECTION B: CLIENT AND REFERENCE INFORMATION (optional)**

1. Please provide a list of the clients you currently have under contract including a description of the type of services you are providing.
2. Please provide three client references that most closely relate to our organization, including the name, address, telephone number, title of the contact, and dates your services were engaged by the reference.

**SECTION C: PROCESS AND PHILOSOPHY**

1. Define in general terms your approach to the process.

**SECTION D: SCOPE OF WORK**

1. Referring to the information provided in the summary, please describe your scope of work, including:
   1. Components of the plan (for example - Mission/Vision/Values, Stakeholder Surveys, Meetings with Board/Committee, etc.)
   2. Key milestones and projected completion dates;
   3. Overall outcomes.

**SECTION E: REPORTING**

1. Describe the frequency of communications or reports and format used.

**SECTION F: FEES**

Please describe the fees proposed by your organization. Please indicate whether fees are all-inclusive or whether travel and other out-of-pocket expenses will be billed separately. Indicate the billing frequency.