



Request For Proposals: Strategic Planning Services

April 2021

The Montana Budget & Policy Center (MBPC) is looking for consulting services to facilitate and support the organization's board and staff retreat focused on developing a three-year strategic plan. A core focus of that plan will be to deepen MBPC's work and commitment to racial equity.

MBPC is a nonprofit organization created in 2008 to provide in-depth research and analysis on budget, tax, and economic issues. Our mission is to advance responsible tax, budget, and economic policies through credible research and analysis in order to promote opportunity and fairness for all Montanans. We advocate for policies to ensure that everyone can share in the state's prosperity. We produce reports and policy recommendations on a range of issues that create a fair opportunity for everyone to work, learn, and improve their lives.

Timeline

We will begin reviewing submissions on May 15 and hope to finalize a contract by June 1. Over the summer, the facilitator will work with MBPC leadership to design the format and objectives for a board and staff retreat, scheduled for September 29-30, 2021, in Missoula. It is the preference to have the facilitator in person if public safety allows. Post retreat, the facilitator will compile information gathered at the retreat and work with MBPC leadership and staff to develop a concise strategic plan with the goal of that process completed by November 2021. MBPC staff will have board approve the written plan at its December board meeting. We look to have the facilitator work with MBPC until consensus is reached.

Organizational Context

- MBPC has a team of 10 with relatively stable grant funding to maintain this level of capacity.
- MBPC staff and board had a retreat in 2020 focused on racial and ethnicity equity and inclusion (REEI) and have committed to further relationship-building (with each other and staff) and centering REEI in both internal and external organizational work. However, the pursuit of racial equity is a journey, and members of staff and the board are at a variety of places in their learning.
- MBPC will have three new board members in summer 2021, bringing our board to eight, of which a majority will be Black, Indigenous, or people of color (BIPOC).
- In 2011, MBPC established a focus on State-Tribal Policy to promote sound fiscal and budget policy that serves to reverse the history of economic injustice that denies many Montanans who are American Indian access to opportunity.

Purpose of Board and Staff retreat

MBPC looks to use the two-day retreat to develop a three-year strategic plan that will center equity.

Topics to address may include:

- Discuss and potentially revise MBPC's mission statement.
- Examine MBPC's role in regard to pursuing anti-racist public policy. What is our work now? Where are the gaps? What can we do differently? How are we applying our strengths in relationship with marginalized communities? What has worked, and what can we do to affect more equitable policies? What is MBPC's long-term vision for the role it should play in Montana? What does it mean to be a good partner? What is the board's role advancing MBPC's equity lens?

Goals of Strategic Planning

- Develop a concise strategic plan and organizational goals for the next three years that may incorporate the following areas.
 - Internal Organizational Policies and Procedures
 - Develop systems to create an inclusive work environment.
 - Discuss concrete steps for board and staff to continue to deepen internal racial equity learning and to learning about other oppressive systems/structures.
 - Prioritize REEI lens in professional development, budget development, hiring strategies, staff growth, internal organizational policies, and fundraising.
 - Programmatic and Policy Objectives and Growth
 - Discuss how changed state landscape impacts MBPC's work moving forward, how we define success, and how we center equity despite that change.
 - Identify future programmatic work in research, communications, and policy development that centers equity. Discuss MBPC's current process and possible changes in identifying research, communications, and policy priorities.
 - Discuss how to utilize MBPC's organization reputation to influence more equitable public policy.
 - Partnerships
 - Identify current and future partnership opportunities.
 - Set goals related to what partnerships look like, including the development of policy priorities, regranting, and financial support.
 - Examine how/when to shift policies based off partner or community input.
 - Organizational Stability
 - Explore the gaps in MBPC's structure, leadership, and staff capacity.
 - Set achievable goals regarding financial capacity.
 - Review board makeup, participation, and goals for board recruitment into the future.
 - Board Engagement
 - Set goals related to the board's engagement with and support of MBPC's equity work.
 - Analyze the board's role in executing the above areas, including programmatic objectives, partnerships, internal organizational policies, and organizational stability.
 - Identify other areas of more specific board engagement.

Content of Proposal

Proposals should be submitted to Heather O'Loughlin at holoughlin@montanabudget.org and include the following information.

- Description of consultant's experience with and approach to centering equity and inclusion throughout the process and deliverables.
- Consultant's approach to strategic planning with an explanation of how the process is inclusive.
- Proposed scope of services and timeline.
- Proposed tools, strategies, or methodologies used in a retreat setting.
- Description of strategies or tools proposed to engage board and staff members of varying backgrounds, skills, and experience with MBPC, and varying levels of racial equity learning.
- Description of deliverables
- Qualifications and relevant experience
- Cost estimates
- Two references
- Potential travel costs