



## **Request for Proposals**

### **CONSULTING SERVICES TO GUIDE STRATEGIC PLANNING PROCESS**

*Deadline: March 20, 2020*

HASER, Inc. is seeking proposals from qualified individuals or firms to facilitate a strategic planning process. The selected consultant will work closely with the Executive Director and Board of Directors to develop the specific details and logistics of the planning process.

#### **Background**

HASER is a 501c3 organization registered in Puerto Rico and dedicated to stimulate quality and equity of life by supporting grassroots actions. We envision a society where local communities organize and implement socio-ecological resilient strategies that improve equity of all life in Puerto Rico. Our strategy is to develop a network of collective actions, sharing resources and responsibilities to potentiate change. HASER provides services to groups and nonprofit organizations in three main areas: group formation, capacity building and fiscal sponsorship. These services strengthen the group's capacity to sustainably grow while maintaining their leadership and vision for implementing actions that align with our mission.

Founded in 2016, HASER, Inc. is the first non profit organization dedicated to providing 501c3 fiscal sponsorship in Puerto Rico. We offer fiscal sponsorship to local grassroot organizations that are developing social, cultural, environmental, artistic and educational actions in their communities. They receive support in administration, strategic plans, proposal development and communications. HASER currently sponsors six organizations.

#### **Project Overview**

We are seeking a consultant to create a strategic plan for HASER through a participatory process, involving the staff, the Board of Directors, sponsored organizations and stakeholders.

#### **Scope of Work and Deliverables**

We expect the consultant to provide the following services:

- Project management
- Design and execution of a strategic visioning and comprehensive planning process

- Develop an actionable strategic plan, including a projected budget for implementation
- Develop recommendations regarding the plan’s implementation and support structure
- Work in collaboration with other consultants and/or advisors who will support the planning process in specialized fields, such as financial planning, evaluation, and fiscal sponsorship.

It is expected that these services will be provided through a combination of activities, including:

- Research on the background of HASER and sponsored organizations.
- Research on other non-profits with similar focus (e.g. fiscal sponsorship, grassroots actions).
- Group meetings, interviews, surveys and/or any other useful method to collect input from staff, Board members, sponsored organizations and stakeholders.
- Facilitate group meetings with the Board and Staff to create consensus regarding a strategic vision and plan. The main meeting with the Board of Directors must take place on June 12, 2020 in Puerto Rico. Other meetings may be done virtually.

Deliverables should consist of the following:

- All material, documents and guides needed to conduct strategic planning sessions as well as obtain input from stakeholders.
- A stakeholder engagement report.
- Strategic plan document(s).

**Timeline**

The project should start in April 2020 and be completed in six months.

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|---|---------------------|
| Consultant selection  | April 3, 2020       |
| Contract commencement   | April 14, 2020      |
| Develop planning process  | April - June 2020   |
| Board meeting   | June 12, 2020       |
| Gather and review sponsored organizations and stakeholder input | June - August, 2020 |
| Board planning sessions   | August 2020         |
| Submit final deliverables                                       | October 30, 2020    |

## Qualifications

To accomplish the scope requested, the consultant will need to possess the following qualifications:

- Experience at developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience at gathering and utilizing data to inform the strategic planning process
- Knowledge of budgeting
- Knowledge of resource development
- Ability to constructively challenge key stakeholders
- Project management experience
- Fluent in Spanish and English.

Experience and knowledge in fiscal sponsorship is highly desirable, but not required.

## Proposal Format

The proposal should have two sections: narrative and supporting documents. The narrative should describe in no more than five (5) pages:

- Proposed approach and schedule
- Relevant experience and qualifications
- Key individuals and/or staff members who will be providing services
- A statement of project cost, including consulting time, materials, travel, and other anticipated costs
- Contact information.

Please include the following supporting documents:

- Proposed budget
- Work plan and timeline with milestones and deliverables
- CVs of the persons who will be providing the services requested in this RFP
- A list of three references for whom you have provided similar consulting service
- At least two samples of relevant work.

The proposal should be in PDF format and sent by email to Anahí Lazarte Morales at [anahi@hasercambio.org](mailto:anahi@hasercambio.org) by **March 20, 2020, 11:59 p.m. AST.**

Questions about this RFP should be sent by email to [anahi@hasercambio.org](mailto:anahi@hasercambio.org).