

**Request for Information:
Consulting Services for
National Fund for Workforce Solutions Strategic Plan**

Background:

The National Fund for Workforce Solutions is entering the final year of a five-year strategic plan (2019-2024) and is seeking a consultant(s) to assist with the creation of a new strategic plan for 2025 and beyond.

In September 2022, we declared race equity in workforce as our north star and identified **three impact goals** required for workforce equity:

- All workers have the resources required to thrive.
- Race does not dictate employment outcomes.
- All jobs are good jobs.

To support the advancement of these three impact goals, we created a **theory of change** for the National Fund network that outlines the necessary changes in capacity, practices, and outcomes, and we developed **priority initiatives** for fundraising. We created two-year **organizational goals** (FY23 – FY24) to help us better execute on our priority initiatives and theory of change:

- Develop a worker-centered talent strategy for National Fund staff and design effective operational systems, which advance our mission and support staff career growth.
- Deploy a diversified funding model that supports stability and sustainable, strategic growth.
- Strengthen the National Fund's value proposition by aligning our network, learning agenda, and projects with integrated theory of change.

Scope for 2025 Strategic Plan:

We plan to maintain our north star of advancing race equity in the workforce, the three impact goals, and the framework of the integrated theory of change. The new strategic plan will incorporate internal (organization/network) and external (programs/initiatives) work. The new strategic plan should articulate how we can best contribute to the three impact goals, put the theory of change into action, track our results and communicate our value.

The plan should help us answer these questions:

- What programs do we prioritize?
- What are the data points and trends driving our strategy?
- How do we ensure that we have the necessary resources (grants, revenue, staff, technology, tools, operational systems) in place — at the National Fund and across our network — to drive change?
- How do we align our communication strategy and network composition with our impact goals?

- How do we fully support the network design and beliefs we co-created with our collaboratives?
- How do we track our progress in implementing the strategic plan? How do we determine and measure success in implementing the strategic plan?
- Where do we seek to shift practices and narratives in the broader workforce field? How do we ensure we have the necessary communication strategy to do so?
- How do we maintain flexibility so that we can be responsive to changing labor market conditions?
- How should the plan help our network prepare for the future of work?

High-level timeline:

- August 2023: Review strategic plan considerations and timeline with Program & Learning Committee (Aug 3) and Board of Directors (Aug 22).
- October 2023: Select consultant(s) to facilitate strategic planning process.
- November 2023: Staff review successes of 2019 plan, celebrate wins, and begin to ideate and co-create content for draft plan.
- December 2023 Board meeting: Engage Board of Directors on key components of the strategic plan.
- March 2024: Engage site directors from our regional workforce collaborative network on key components of strategic plan.
- April 2024: Engage other key stakeholders in network and workforce development field.
- May 2024 Board meeting: Finalize strategic plan with Board of Directors.
- (Tentative) September 2024: Announce key components of plan at SHIFT 2024, the National Fund's biennial convening.

Consultant Scope of Services

We seek a consultant(s) to facilitate and coordinate efforts of National Fund staff, board members and network leaders through a strategic planning process, following the timeline above. We anticipate the consultant(s) performing the following activities:

- October 2023:
 - Meet with Executive Team to discuss overview, purpose, and scope of strategic plan.
 - Review background materials. Determine what additional information, data or meetings are needed.
 - Conduct brief environmental scan of similar national workforce organizations to uncover potential opportunities and challenges.
- November 2023:
 - Engage all staff in-person in Washington DC (November 6-8) to co-create content for draft plan.
 - Process and summarize input to develop draft plan. Review with leadership including the executive team and directors.
 - Attend Board Program & Learning Committee virtual meeting to help facilitate conversation and capture feedback to draft plan.

- December 2023:
 - Attend in-person Board meeting December 6-7 in Louisville, KY and facilitate discussion of key components of strategic plan. Capture feedback.
 - Meet with Executive Team to review.
- January – February 2024:
 - Collect any additional data, information required to set specific objectives or targets in plan.
 - Meet with Chief Program Officer and Network Director to determine strategy for engagement of network leadership.
- March 2024:
 - Attend in-person network leadership meeting on March 5-7, 2024, in San Juan, PR (approximately 70 people from over 30 communities) and facilitate discussion of key components of strategic plan. Capture feedback.
 - Meet with Executive Team to review and identify additional stakeholders to be engaged for feedback.
- April 2024:
 - Collect feedback from additional stakeholders as needed.
 - Review feedback and draft plan with Executive Team and directors.
 - Facilitate discussion with all staff to finalize plan.
- May 2024:
 - Present final draft strategic plan to Board of Directors. Facilitate conversation and capture feedback.
 - Finalize strategic plan.

Consultant Selection Process

We will follow the steps below to identify a consultant:

1. If you are interested in leading this project and can accommodate the timeline above, please provide your contact information and the following information [here](#) by **Monday, October 2:**
 - General overview of you and/or your company using **existing** materials (e.g., a bio, resume, CV, website, and/or LinkedIn profile)
 - Brief (no more than one paragraph) statement of why you are interested in working with us
 - Contact information (name, organization, relationships, phone, and email) for three references.
2. We will invite several interested consultants/firms to provide a brief (no more than one page) description of the proposed approach and budget for the project, to be submitted by **Wednesday, October 11.**

3. We will schedule a 30-minute call with a limited number of consultants/firms on **October 12 or 13** to discuss our needs in more detail and to assess alignment. We plan to select a consultant by **Monday, October 16**.

Please feel free to ask any questions about the process in your initial submission.