

Appendix 3



[www.HealthRA.org](http://www.HealthRA.org)

REQUEST FOR PROPOSALS FROM STRATEGIC PLANNING FACILITATORS

PROPOSALS DUE BY: July 9, 2020, 8 PM ET

**PROJECT OVERVIEW**

We are seeking proposals from experienced strategic planning facilitators to guide the Health Research Alliance through our next strategic planning cycle.

**WHO IS ELIGIBLE TO RESPOND?**

The Health Research Alliance (HRA) seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations (especially membership organizations), have strong facilitation skills, and have proven experience with nonprofit strategic planning.

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## About the Organization

The Health Research Alliance is a collaborative member organization of nonprofit research funders committed to maximizing the impact of biomedical research to improve human health. HRA represents over 90 member organizations who have a shared interest in speeding the translation of biomedical science into applications that improve health, and in identifying and adopting effective practices in funding health research.

HRA was incorporated in November 2005 and is tax exempt under section 501(c)(3) of the Internal Revenue Code as a 509(a)(2) public charity. Our most recent Strategic Plan was approved in 2016.

## Project Overview

The HRA Board of Directors has designated a 12-member Strategic Planning Committee to develop an updated Strategic Plan for approval by HRA's Board of Directors in late 2020/early 2021. The Committee has chosen to hire an external firm to guide the strategic planning process.

The new Strategic Plan should serve as a roadmap for prioritizing where HRA should devote resources for the next five years. Resources need to be allocated in a way that provides HRA members the greatest benefit for their membership.

This RFP will enable the Committee to select a partner to help achieve the broad objectives of the strategic planning process which include:

1. Identifying stakeholders from whom feedback should be solicited (such as current and former HRA member organizations, potential members, targeted public, etc.)
2. Identifying what the stakeholders currently get or have gotten out of HRA and what they want to get out of HRA (i.e. identify program areas of interest to the stakeholders and where HRA has over or under allocated resources)
3. Recommending if HRA needs to change/adapt to changing member needs or biomedical research climate. And if so, how?

## Statement of Work

In order to complete the objectives above, the strategic planning facilitator will need to do some or all of the following, in cooperation with the Strategic Planning Committee:

1. Craft an online survey (or surveys) for a broad and large group of stakeholders
2. Conduct phone/video interviews with a smaller but diverse group of stakeholders (in the range of 40-60) to gather robust data about HRA's strengths, weaknesses, and opportunities
3. Organize and analyze survey and interview data
4. Perform independent research on industry trends

## Deliverables

In addition to the data and analysis from surveys and interviews, the final product should be a detailed report outlining specific recommendations based on the data gathered and research performed, along with sector trends. This report will guide the Strategic Planning Committee in developing a new Strategic Plan to present to the Board. This plan will ultimately serve as a guide for HRA staff and leadership regarding strategic allocations of resources, and for stakeholders to understand HRA's mission and strategic priorities.

## Final Project Due

The expected project completion date is Fall 2020. A more exact date for the deadline of the final report including specific recommendations will be determined in consultation with the firm with whom we will be partnering.

## Budget

Our goal is to hire a firm with experience and pricing for small non-profits. The maximum budget range is \$10,000 - \$14,000 with priority toward responses that consider pro bono work for our non-profit.

## Evaluation Metrics

The Strategic Planning Committee will determine the consultant or firm that is the best fit for this project using the criteria listed below.

- Previous experience/past performance history with nonprofit organizations
- Samples and/or case studies from previous projects
- Experience and technical expertise
- Projected costs

## Process for Proposal Submission

Please email the proposal including projected costs, experience with other nonprofits, and samples from previous projects, by 8 PM ET on July 7<sup>th</sup>, to:

**Maryrose Franko, PhD**, Executive Director, HRA, [Maryrose@healthra.org](mailto:Maryrose@healthra.org)

## Contact Information

For questions or concerns connected to this RFP, please email [Maryrose@healthra.org](mailto:Maryrose@healthra.org) to set up calls or send emails to:

**Chris Martin, PhD** (*Chair of the Strategic Planning Committee*)

Co-Director, Science; Sr. Science Program Officer; Assoc. Vice President, Operations  
The Kavli Foundation

**Heather M. Snyder, PhD** (*Chair of the Health Research Alliance Board of Directors*)

Vice President, Medical & Scientific Relations  
Alzheimer's Association