



## **REQUEST FOR PROPOSALS**

**To Develop a Strategic Plan for Veriditas**

**ISSUE DATE: October 27, 2014**

## **Request for Proposals To Develop a Strategic Plan for VERIDITAS.**

This request for Proposal (RFP) is soliciting written proposals from professionally qualified contractors to provide services to VERIDITAS for the development of a one to three year strategic plan. All proposals should clearly define how they will work with Veriditas to assist in a comprehensive, participatory planning process.

**Issue Date: October 27, 2014**

**Closing Date and Time: December 1, 2014**

**Submission:** Deliver digital proposals only of no more than 10 pages to:

Dawn Matheny, Executive Director  
VERIDITAS  
[rfp@veriditas.org](mailto:rfp@veriditas.org)

Proposals received after the deadline or sent by facsimile or mail will not be accepted.

## **BACKGROUND**

### **Mission and Vision**

Veriditas is dedicated to inspiring personal and planetary change and renewal through the labyrinth experience.

We accomplish our mission by training and supporting labyrinth facilitators around the world, and offering meaningful events that promote further understanding of the labyrinth as a tool for personal and community transformation.

Our Vision is that the labyrinth experience guides us in developing the higher level of human awareness we need to thrive in the 21<sup>st</sup> century.

Veriditas is a 501c3 nonprofit incorporated in the State of California in 1995 by Lauren Artress. The word “Veriditas” originated with Hildegard of Bingen and means “the greening power of life”.

### **Goal and Objective**

The goal of this planning process is to identify and prioritize strategic initiatives that will support the Veriditas organization in fulfilling its mission vision and values and ensure that Veriditas remains a viable, vital organization. The over all objective is to realize a

practical plan for implementing the strategic initiatives that will allow Veriditas to appropriately expand resources.

## **PURPOSE OF PROJECT**

VERIDITAS, a California Incorporated 501-3© not for profit corporation has been through a difficult time in recent years trying to remain financially viable. There has been some success in providing stability but ultimately several of the programs on which Veriditas is dependent are not succeeding financially. A recent analysis completed by Staff and the Board indicated that only one program was consistently profitable.

Fund raising efforts have also been variable and at least partially dependent upon the work of Lauren Artress founder. Lauren has recently announced that she will leave the program in the next year which leaving a vacancy that will be difficult to fill. Both the Board and the Executive Director have agreed that it is important for the organization to review where we have been, where we are, and, where we want to be in the future.

Veriditas wants to review existing strategies and programs and create new strategies going forward to guide us in the next one to three years. This strategic planning process is intended to address, as the following issues:

- What are priorities for the Veriditas organization and how will they be implemented?
- How does Veriditas become more effective in supporting our mission and programs? (Including facilities, space and equipment)
- How do we most clearly and effectively define Veriditas role in providing programs and keeping them profitable?
- How does Veriditas enhance, connect with and support the (large) community of facilitators that have been trained by Veriditas?
- What financial sustainability model would be most effective?
- What additional marketing efforts can Veriditas employ to expand our brand recognition in the community?
- What are the strategic alliance opportunities in our community that are both feasible and compatible with our mission?
- How do we create an ongoing framework that links staff members' short- mid- and long-term goals and objectives as well as the full development of performance measurement systems to the overall strategic vision and plan for Veriditas?
- What long-term growth model, if any, would be most strategically advantageous for the organization?
- How can we be sure that the organization is adequately staffed and that staff is appropriately compensated?
- How will the process itself comprehensively identify systemic issues

## **SCOPE OF SERVICE**

The contractor shall, at minimum, accomplish the following in performance of this contract:

### **Planning Activity and Final Product**

Working with Veriditas, the contractor will:

1. Design and establish a comprehensive strategic planning process with the potential for a Board/Staff planning retreat in January of 2015.
2. Develop a one to three year strategic plan,
3. Provide recommendations, priorities and implementation strategies for this plan.

### **Research**

It is anticipated that these tasks will be accomplished through a combination of:

- Review of Veriditas printed material, publications, and website, including marketing materials, educational program materials, development documents, and any relevant research documents,
- Personal interviews (in person or by phone), of Veriditas management, staff, board, funders, and others including the founder and master teachers,
- Written and telephone surveys, and
- Focus groups, public forums, committee meetings, and/or any other method that will be useful in receiving community input (email, website, etc.) that identify dominant issues, design consensus building objectives and strategies that can be implemented.

## **DELIVERABLES**

Deliverables will be reviewed and accepted by the Veriditas staff and Board of Directors.

Deliverables will include, at a minimum, the following:

- Copies of all instruments used to gather information,
- Interim briefings midway for feedback on direction of the plan,
- Draft plan, in conjunction with Veriditas, that specifies goals, objectives, strategies, timeline and required resources (i.e. financial and human) for implementation, and
- Final plan incorporating necessary revisions along with a presentation to the Veriditas Board. All deliverables will become the property of Veriditas.

It is also hoped that the strategic planning process with Board members will raise the level of discourse among the board members about the work of Veriditas and deepen and strengthen their engagement with the organizational mission.

## **SCHEDULE**

Proposals received electronically by December 1, 2014.  
Committee review and selection completed by December 15, 2014.  
Veriditas Planning Retreat late January 2015

## **COMPENSATION FOR SERVICES**

Veriditas will expend appropriate funds for completion of a high-quality planning process, data and plan. Each contractor's bid should include all fees, expenses, supplies, printing, travel, per diem, overhead and profit, insurance, taxes, and any other expenses attributed to the planning process.

## **SELECTION**

### **Technical Approach**

In outlining your proposed approach to creating a strategic plan for Veriditas, please consider the following:

- Your experience in working with a not for profit organization like Veriditas to create a strategic plan, and based on your understanding of our organization, explain the particular challenges and opportunities to address in a strategic plan in this community.
- Your experience with planning for similar organizations. What were the particular challenges and how were they managed?
- Based on your knowledge and experience, list five critical factors that contribute to successful planning.
- Your role in the process relative to that of Veriditas.
- Your unique capabilities/experiences that your firm would bring to the process.

### **Selection Process**

1. Veriditas staff and a board subcommittee will review and examine all proposals received. Those proposals that do not respond to the requirements of the RFP will be rejected.
2. A strategic planning committee of the Veriditas board and staff will review the proposals and will choose a limited number of contractors for follow up.
3. Contractor may be asked to make an official presentation that will be followed by committee questions.
4. Selection will be made based on the best value to Veriditas and the quality of the proposal.