

# HEART<sup>TO</sup> HEART

## LEADERSHIP

### **Request for Proposal**

#### **For creating an actionable 3 – 5-year Strategic Plan for Heart to Heart Leadership**

#### **I. General information**

##### **A. Overview of Heart to Heart Leadership**

Heart to Heart Leadership is a leadership development fee-for-service non-profit organization that partners with individuals and organizations to cultivate purpose-driven, values-based, community-minded leadership.

For 30+ years, our experienced team has facilitated conversations around mission, vision and purpose to inspire leaders at any career stage.

Each year, we work with around 30+ organizations and individuals from over 100 organizations in the Greater Akron community.

**Our Mission:** Enriching lives by helping individuals and organizations strengthen and live their inner values.

**Our Vision:** A community where people find meaning and purpose and live ethical values in daily work and community life.

**Our History:** Co-founders Rev. Norman Douglas, M.Div. and Lawrence Vuillemin, Esq., crossed paths in the spring of 1986, when Larry was recovering from a life-changing event and Fr. Norm was looking to help individuals experience their inner core values.

People began coming together to discuss in a heart-to heart way how to strengthen the link between their deepest beliefs/values and their daily activity. They eventually started a not-for-profit organization—first called Heart to Heart Communications, Inc., but now known as Heart to Heart Leadership—where they facilitated workplace programs and personal enrichment experiences.

Now, more than 30 years later, Heart to Heart Leadership is one of the premier providers of leadership development programs in the Greater Akron area. We provide a leadership training pathway that focuses on looking within to discover and develop the characteristics and strengths that enable individuals to follow a higher calling to lead beyond in organizational and community life, while bringing along others to also experience greater impact.

#### **II. Purpose of RFP**

This request for proposal (RFP) seeks proposals from qualified consultants for the purpose of obtaining information and firm pricing to conduct a far-reaching and inclusive process to inform and collaboratively create a 3 to 5-year strategic plan for Heart to Heart Leadership (HtoHL).

# HEART<sup>TO</sup> HEART

## LEADERSHIP

The plan will guide HtoHL's operations and decision making from fiscal year 2024 through fiscal year 2029. It will define HtoHL's role in the community, guide the organization's governance and advocacy, and establish a framework for setting strategic priorities and operational goals while creating measurable and achievable service plans and timelines.

The purpose of the strategic plan is to position HtoHL to proactively provide service(s) that meets the changing needs in a cost-effective manner and to educate stakeholders, staff and board members about HtoHL's mission, vision, values and program.

### A. Who may respond

Qualified individuals and organizations (Proposers) with experience working with strategic planning are encouraged to respond to this RFP.

### B. Instructions on proposal submission

1. Closing submission date: Proposals must be submitted by close of business (C.O.B.) on Friday, May 12, 2023.
2. Inquiries: Inquiries concerning this RFP should be directed to Fedearia Nicholson-Sweval, Board Chair, Heart to Heart Leadership. Proposers may direct questions via email or phone call at [fn@uakron.edu](mailto:fn@uakron.edu) or (330) 972-5899
3. Conditions of proposal: All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proposer and will not be reimbursed by HtoHL.
4. Submissions: Proposals can be submitted electronically to [info@htohleadership.org](mailto:info@htohleadership.org) with "Strategic Plan Proposal" in the subject or via hard copy to Heart to Heart Leadership at 37 N. High St. Ste. B, Akron, OH 44308 by the closing date stated above. Proposals not received by C.O.B. on May 12<sup>th</sup> will not be considered.
5. Presentations: Following the submission of proposals, HtoHL may request the Proposer to make a presentation. Reasonable advance notice will be provided to Proposers.
6. Notification of award: It is expected that a decision about selection of the successful Proposer will be made 4 – 6 weeks after the submission close date (May 12<sup>th</sup>).

### C. Description of entity

Heart to Heart Leadership is a leadership development fee-for-service non-profit organization that partners with individuals and organizations to cultivate purpose-driven, values-based, community-minded leadership.

# HEART<sup>TO</sup> HEART

## LEADERSHIP

HtoHL is a private nonprofit corporation and has been determined to be exempt from federal income tax under Section 501 (c)(3) of the internal Revenue Code. It is governed by a volunteer Board of Directors.

### **III. Specification schedule**

#### **A. Pricing**

The Proposer's proposed price for services should include a not-to-exceed total fee and a list of itemized costs.

#### **B. Payment**

Payment terms will be agreed upon with the selected Proposer.

#### **C. Confidentiality**

To the extent that, in the process of finalizing its proposal, Proposer needs access to confidential information from HtoHL, or it needs to provide its own confidential information to HtoHL, Proposer and HtoHL will enter a separate confidentiality agreement regarding that information.

### **IV. Technical qualifications**

The Proposer, in its proposal, shall, as a minimum, include the following:

#### **A. Understanding our needs**

The Proposer should describe the current challenges and opportunities specific to our organization. Describe how your firm is best suited to assist our organization in facing those challenges and opportunities moving forward.

#### **B. Understanding the scope of work**

The Proposer should clearly describe the scope of work to be performed in alignment with this RFP in whatever format Proposer believes best highlights its work. By way of guidance, the successful Proposer in this RFP process will submit a proposal that demonstrates an ability to lead and facilitate the completion of a strategic plan that does the following:

1. **Begins and ends on time.** Proposer should develop a comprehensive timeline. This project should be completed no later than end of calendar year 2023.
2. **Uses an acceptable methodology.** Proposer should have a plan to facilitate a strategic planning process using a methodology acceptable for organizations similar to HtoHL.
3. **Demonstrates contextual awareness.** Proposer should be able to demonstrate an awareness of the political, economic and social factors affecting HtoHL.

# HEART<sup>TO</sup> HEART

## LEADERSHIP

4. **Engages internal stakeholders.** Proposer should have a plan to prepare the HtoHL board, leadership, key staff and others identified by HtoHL to engage in strategic decision making around goals.
5. **Engages external stakeholders.** Proposer should have a plan to engage external stakeholders to gather critical input for the strategic planning process.
6. **Reviews HtoHL's present positions.** Proposer should have a plan to review and make recommendations with regard to HtoHL's mission, vision and values.
7. **Develops strategy.** Proposer should be able to collaboratively develop strategic priorities (three+ year goals), strategies (one-year goals), KPIs, 90-day accomplishments, and action plans that align with our mission, vision and values.
8. **Appreciates Diversity.** Proposal should have a process that reflects the needs, voices and interests of a changing and diverse community. The process should also demonstrate an awareness of the critical needs and disparities in the communities we serve.
9. **Evolves and improves.** Proposer should have a process for HtoHL to annually review and evaluate goals and develop new strategies based on the evaluation, and also establishes a method for evaluating progress and reporting on outcomes.
10. **Includes a Risk Assessment.** Proposer should have a plan to assess the overall risk within our programs, activities and staffing.

### C. Understanding our industry

The Proposer should describe its understanding of our industry by providing specific industry knowledge and expertise.

1. Prior experience working with similar organizations on similar projects.
2. Prior experience providing additional services to organizations similar to HtoHL.
3. Identification of local organizations which may complement our mission and may be potential collaborators.

### D. Engagement team

The Proposer should briefly describe the qualifications of staff to be assigned to this engagement. Descriptions should include:

1. Consulting team background/bio and team makeup.
2. Prior experience and industry specialization of the individual team members.

### E. Approach to the engagement

The Proposer should describe its approach to the work to be performed explaining the approach, style and process to be used.

# HEART<sup>TO</sup> HEART

## LEADERSHIP

### **F. References and examples**

The Proposer should provide a list of references for HtoHL to contact to inquire about work performed by the Proposer.

had material impact to that organization.

### **Primary Contact for Inquiries:**

Fedearia Nicholson-Sweval, Board Chair, Heart to Heart Leadership.

[fn@uakron.edu](mailto:fn@uakron.edu)

(330) 972-5899 (w)

### **Authorized Representative:**

Jeremy Lile, Executive Director, Heart to Heart Leadership

[jeremy@htohleadership.org](mailto:jeremy@htohleadership.org)

(330) 256-7353 (m)