



**Museum of Early Trades & Crafts
RFP for Strategic Planning Facilitator**

We are soliciting requests for proposals from facilitators experienced in strategic planning to lead the Museum of Early Trades & Crafts (METC) Board of Directors and staff through a strategic planning process to formulate a three-year plan for the organization.

The organizational leadership seeks a process that

- Calls for the active participation of board and staff members to set aspirational goals as it relates to the mission and values of the institution.
- involves board members, staff, and stakeholders in identifying focal points for the strategic plan.
- Assists the Executive Committee of the Board and the Executive Director in creating action steps with measurable outcomes.
- Prepares board and staff to assume responsibility for implementing and monitoring the progress of the strategic plan.
- Prepares board and staff to plan for and address modifications to the plan as internal and external changes occur.

Background Information

METC is a nonprofit (501 c 3) organization with a current mission *to inspire a connection with New Jersey's history, culture, trades, and crafts. We accomplish this using the following values:*

Community: *We strive to be an inclusive and collaborative place where all feel welcome.*

Innovation: *We incorporate creativity and technology in all our exhibits and programs to spark a connection with history.*

Integrity: *We uphold the highest standards in museum practice.*

Education: *We create experiences and share stories of the past to help visitors discover our collective history and culture.*

The museum's focus is NJ history education. Our annual operating budget is approximately \$600,000 and we have an endowment with both restricted and unrestricted access for operations. 2020 and the COVID-19 pandemic ushered in an abrupt shift in METC's operations and programs that necessitated quick action and caused us to look more closely at our mission, our audiences, our resources, and our capabilities, making us aware that strategic planning must also involve contingencies, flexibility, and adjustable timelines. The staff is comprised of five full time and seven part-time employees. The board currently includes thirteen members with a maximum of twenty-five.

The organization partners with individuals, government agencies, foundations, and many other community groups across the state to accomplish its goals. It is important that stakeholder input be a part of the strategic planning process. We would like to see a process for gathering input from members, donors, agencies, and partners that considers new opportunities for growth and development of the organization. A general survey combined with smaller focus groups in key geographic areas would be appropriate for gathering suggestions from this stakeholder group. It will be important for the strategic planning process and plan itself to set priorities with measurable outcomes.

Scope of Work

Inn 2019 METC completed a Strategic Plan that identified specific goals and action steps. The 2020 pandemic interrupted a number of these action steps as we needed to address immediate. We would like to look closely at the strengths and shortcomings of the 2019 Strategic Plan and develop a new plan with more focus on the following:

Identifying strengths and evaluating mission and vision statements and creating core values.

Developing aspirational strategic goals.

Developing strategic plan framework and action steps, for production of a shorter summary plan for public distribution, and for implementation plans and progress monitoring

Process for modifying the plan over its lifecycle if needed.

Timeline for creating the plan.

We expect complete facilitation of the process to be reflected in the proposal; a goal of the planning process is to create a system for the board and staff to work effectively together to create and carry out the strategic plan as well as the ongoing business of METC. The proposal should provide an executive summary of the work that will be performed by the consultant and a detailed breakdown, with time frames, of the steps that will be taken to develop a strategic plan.

Expected outcomes of the process include:

Coordination of the writing and editing of drafts and the final strategic plan document, including a separate, shorter document for external dissemination if necessary.

Documentation of the strategic planning process, including key discussions and decisions at each stage, for development of strategy documents and communication

The deadline for submission of proposals is September 1, 2022, and deadline for completing the strategic plan will be December 2022. Please create your timeline within this framework.

Application Process and Procedures

Please provide a complete written response to this RFP and include:

1. A brief Executive Summary.
2. A description of the applicant's general approach to strategic planning facilitation.
3. A list of project deliverables to be created with a timeline for each deliverable and overall project completion
4. A detailed budget that breaks down expenses
5. Credentials and qualifications of key personnel who will take responsibility for working directly on this project
6. Three references
7. Example(s) of a finished strategic plan created by your company

Questions and completed proposals may be directed to METC's executive director, Deborah Farrar Starker director@metc.org