

Request for Proposals for Strategic Planning

Issue date: February 20, 2020

The Latin American Studies Association (LASA) is seeking proposals from qualified individuals or firms who have demonstrated experience in successfully developing consensus-based strategic plans, have strong facilitation skills and proven experience with non-profit strategic planning which will result in a completed plan by **December 30, 2020**.

About LASA

LASA is the largest professional association in the world for individuals and institutions engaged in the study of Latin America. With over 13,000 members, over 60% of whom reside outside the United States, LASA is the one association that brings together experts on Latin America from all disciplines and diverse occupational endeavors, across the globe. Every year, specialists on Latin America gather at the LASA International Congress. Featuring over 900 sessions, including plenary sessions and informal meetings, the Congress is the world's premier forum for expert discussion on Latin America and the Caribbean.

Mission

LASA's mission is to foster intellectual discussion, research, and teaching on Latin America, the Caribbean, and its people throughout the Americas, promote the interests of its diverse membership, and encourage civic engagement through network building and public debate.

Scope

The consultant(s) will be responsible for:

1. Designing and executing a strategic visioning and comprehensive planning process included (but not necessarily limited to) the following:
 - a. Information gathering from LASA staff, board, members (individuals and institutions) and funders
 - b. One-on-one interviews with at least 10 key partners
 - c. Survey to funders
 - d. Survey to members
 - e. Benchmarking and SWOT analysis
 - f. Written assessment of surveys/interviews, including landscape analysis and summary of conclusions/recommendations
 - g. Alignment of plan with budget
 - h. Meeting, planning and facilitation, including:
 - i. At least 1 staff visioning sessions or planning meeting
 - ii. 1-2 days strategic planning retreat
 - iii. Monthly meetings with Directors' team at the LASA Secretariat

2. Creating of a draft and final 5-year strategic plan which should include:
 - a. A (potentially) updated Mission Statement
 - b. A Vision Statement
 - c. External and internal goals that are strategic, actionable, and measurable
 - d. Yearly Key Performance Indicators (KPI's) to measure achievement of those goals.
 - e. Tactical actions to implement and re-assess goals
3. Project management including:
 - a. Managing the overall process, liaising with board and staff
 - b. Producing drafts of surveys, reports, etc. for feedback
 - c. Preparing materials for, creating agendas and facilitating meetings
 - d. Working with the LASA Secretariat staff on scheduling and logistics

Proposal Format

Please include the following in your proposal:

1. Examples of similar projects (especially with organizations similar to LASA's)
2. Consultant's approach to strategic planning
3. Summary of strategic planning experience
4. Suggested project timeline with major tasks and milestones
5. Project budget per line item
6. Sample project plan
7. Consultant's project team, including role and relevant experience
8. Three client references

Minimum Qualifications

To accomplish the scope requested the consultant(s) will need the following:

1. Experience at successfully developing consensus-based strategic plans
2. Strong facilitation skills
3. Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
4. Ability to constructively challenge key stakeholders
5. Experience inspiring others to think creatively and innovatively
6. Experience with survey development and data analysis
7. Experience at gathering and utilizing data to inform the strategic planning process
8. Experience with budgeting
9. Knowledge of marketing, communications, technology and branding
10. Strong project management experience

| Process for Proposal Submission | |
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| Deadline to Submit Proposals | March 31, 2020 |
| Deadline for Inquiries Concerning RFP | March 10, 2020 |
| Conditions | All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by LASA. |
| Submission Instructions | Proposals should be submitted in PDF format via email to lasa@lasaweb.org by 5 pm EST of March 31, 2020 . Late arrivals and mail submissions will not be accepted. A proposal may be excluded for further consideration if it does not follow the specified format. |
| Criteria for Selection | LASA will select the proposal that delivers the highest quality deliverable at the best value. Proposals will be reviewed by the Executive Director and the Strategic Planning Oversight Committee. Final selection will be made by the Strategic Planning Oversight Committee. |
| Confidentiality | If the bidder deems any material submitted to be proprietary or confidential, it must be indicated. |
| Notification of Selection and Timeline | Bidder will be selected within two weeks of the deadline although this is subject to change. Upon conclusion of negotiation with the successful bidder, all bidders submitting responses to this RFP will be informed in writing of the name of the successful firm or individual. |

LASA encourages proposals from small businesses, minority-owned firms, and women's enterprises.

LATIN AMERICAN STUDIES ASSOCIATION

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