

REQUEST FOR PROPOSAL
STRATEGIC PLANNING CONSULTANT

Sunrise Educational Society

Proposals will be received until
January 2, 2018 5:00 p.m. PST

**This RFP is also available at our
website:**

<http://sunrisewaldorfschool.org>

REQUEST FOR PROPOSAL

I. Project Objective

To develop a seven-year strategic plan.

Issuing organization: Sunrise Educational Society (SES)
2148 Lakeside Road
Duncan, BC V9L 6M3

RFP Issued: November 24, 2017

Questions must be received by: 5:00 p.m., PST, December 6, 2017

Responses to Questions: 5:00 p.m., PST, December 11, 2017

Due Date for Proposals: 5:00 p.m., PST, January 2, 2018

The policy of the SES Board is to solicit proposals with an honest intention to award a contract. This policy will not affect the right of SES to reject any or all proposals.

Contact for Further Information: Kevin McDuff, Head of School
hos@sunrisewaldorfschool.org
Phone: 250-743-7253

II. Summary

Sunrise Educational Society (SES) is seeking consultant services for the development of a seven-year strategic plan through engagement of the school community based on the need to further the growth and development of Sunrise Waldorf School in its delivery of educational services in the Cowichan Valley based on the Waldorf School philosophy and practices.

III. Background

Sunrise School was conceived in 1979 when six families that shared a common interest in education met socially for children's play groups. The parents were mostly educators and social workers. While they explored various educational alternatives, some of their early studies and discussions centered on Waldorf education. In the 1980-81 school year, the families rented a small cabin and opened the school. This cabin on Sunrise Road became the first home of Sunrise School. During the 1983-84 school year, the community decided to apply to become an accredited Waldorf School. The school incorporated as a society during the 1984-85 school year, inaugurating its Board of Directors and a new governance structure.

In April of 1991, the school moved to its current location and began developing the school within the Agricultural Land Reserve. By this time, the school had 112 children attending. Efforts to develop the school toward a high school and to grow the school building spaces have involved the Agricultural Land Commission and the Cowichan Valley Regional District. The requirements set

by these governing bodies have complicated the manifestation of the vision of the school. The school achieved fully accredited member school status in the Association of Waldorf School of North America (AWSNA) in 2003, becoming Sunrise Waldorf School (SWS). Enrolment at SWS has been up and down over the last two decades. SWS currently educates 168 children with a staff of 27 employees, and an annual operating budget of \$1.57 million.

During the 2011-12 school year, SES reviewed the governance and management structure of the school to comply with Ministry of Education requirements. The Head of School position was created, and following an open search, the Board affirmed the Administrator, Kevin McDuff, in that position.

After spending the last three years working through several areas of re-structuring to meet accreditation requirements and business needs, the Board believes it is becoming increasingly urgent to go through a strategic planning process to identify strengths and weaknesses, and to identify and act on threats and new opportunities.

IV. Scope of Work

The SES Board seeks a consultant to lead the board, staff, and community through the process of developing a seven-year strategic plan. The plan will articulate SES's vision and mission, look at its current state in multiple areas, look at the current social, educational, business, and regulatory environments, and help identify immediate goals, objectives and action steps to guide the organization and community for the next seven years.

After assessing the current environment from a regional and organizational perspective, the project must include the following areas in the development of key aims and goals in the published strategic plan:

- Pedagogical Development
- Business Development
- Teacher Preparation and Professional Development
- Board of Directors and Governance
- Leadership
- Administration
- Community Development
- Facilities and Environment

Some of the questions that must be addressed are as follows:

What should be SES's areas of strategic focus?

What approaches are possible toward growth and development of the school and community?

What partnerships can/should be developed?

What services can be delivered more efficiently and more economically?

Are there new areas of programming that should be considered?

How will funding priorities be set? Budget cuts determined?

Are there new funding opportunities and/or new funding streams?

The process must include staff, board members, the school community, and the neighborhood community. The consultant will work with a Strategic Plan Committee, made up of members of the

Board (voting and non-voting), on the details of the strategic planning process, schedule of activities, and selection of background information.

V. Deliverables

The following deliverables are required to complete the project. The Proposal should include options and pricing to complete the following deliverables through full facilitation or a combination of consultant facilitation and in-house facilitation.

- Community Engagement Plan to gather stakeholder data for the planning process
- A Board Engagement, Review, and Project Completion Plan that outlines the timeline and facilitation process for completion of the Strategic Plan Document
- School and Community Context Document that synthesizes the data found from the regional to organizational environment assessment
- A final Strategic Plan Document must include the following in detail:
 - Strategic areas of focus and service priorities for the next seven years
 - Goals and objectives to meet priorities
 - Services and programs (both current and new) that will support goals, including partnerships with other organizations
 - Meeting AWSNA needs and adding value
 - Necessary skills for staff to carry out programs
 - Possible new funding streams

VI. Timetable

Request for Proposal	November 24, 2017
Questions from consultants due	5:00 p.m., PST, December 6, 2017
Responses to questions sent	5:00 p.m., PST, December 11, 2017
Proposal due	5:00 p.m., PST, January 2, 2018
Reach award decision	By January 31, 2018
Planning activities	February-March 2018
Execution of activities	April 2018
Plan draft completed and presented	May 2018
Strategic Plan Completed	June 2018

VII. Selection Process

The Strategic Plan Committee will review all proposals. In evaluating proposals, price will not be the sole factor. The Committee may consider any factors it deems necessary and proper, including but not limited to: price, quality of service, response to this request, experience, staffing, and general reputation. The final decision rests with SES Board.

VIII. Information Required of Respondents

In responding to this RFP, please use the following format.

Response to RFP should be no more than five pages in length, plus attachments.

Section 1. Summary of the Proposal

Provide a brief summary of Sections 2 through 6 of the proposal.

Section 2. General Description of the Planning Activities Recommended

Provide a brief statement of your understanding of the requested effort including the conclusions.

Section 3. Work Plan

Provide information about proposed activities that would involve key stakeholders such as SES Board, staff, community, and parents. Also, provide a timetable outline for completing the process within the timeframe in Part VI.

Section 4. Staffing Plan, Including Resumes

Please identify each person who will work on the project and identify his or her role. Also provide a resume and references for each member.

Section 5. Budget

For each task in Section 3, please identify the expected hours of staff members identified in Section 4 and the total cost. SES will reimburse the consultant for those tasks completed associated with developing the strategic plan. Identify the total billing rate for each project member. Please identify detailed costs for anticipated meetings.

Please use the following budget format:

Activity	Staff	Hours	Project Cost
		Total	

Section 6. References

Please supply the names of three references for which you have worked on similar projects. Include the current contact information for each reference.

IX. Proposal Submission

Proposals should be prepared in a straightforward manner to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

Questions concerning this RFP shall be emailed to Kevin McDuff, Head of School, at hos@sunrisewaldorfschool.org by 5 p.m. (PST) December 6, 2017. Responses to questions will be emailed no later than 5 p.m. (PST) December 11, 2017. The questions and answers will be shared with all respondents to this RFP via the SES website <http://sunrisewaldorfschool.org>

Address the Proposal to: Kevin McDuff, Head of School
Email address: hos@sunrisewaldorfschool.org
Subject line: Strategic Planning Proposal
Deadline for Receipt of Proposal: No later than 5 p.m. (PST), January 2, 2018

SES Board may request representatives of a bidding organization to appear for interviewing purposes. Travel expenses and cost related to the interview will be the responsibility of the bidder. SES will reach a decision on awarding the contract no later than January 31, 2018.

X. Additional information

Consultants may provide any additional information it feels would assist SES in the selection process.

XI. Proposal Review and Assessment

The Strategic Plan Committee will evaluate proposals and the highest-ranking proposer may be asked to make formal presentations to SES Board.

Consultants will be evaluated on the following criteria. These criteria will be the basis for review of the written proposals and interview session.

- Understanding of our organization, the Context and Task
- Project Approach
- Consultant Firm Experience
- Primary Consultant's Experience
- Cost Proposal