



REQUEST FOR PROPOSALS STRATEGY REVIEW CONSULTANCY SUPPORT

Project

ACF is seeking consultancy support to work with us on our five-year strategy review. We need someone who can keep the project moving forward, help us make sense of stakeholder feedback, structure opportunities for our members to participate in the process, and engage and facilitate our board and staff team in the decision-making process.

Introduction

The Association of Charitable Foundations (ACF) is the membership association for the UK's endowed foundations and charitable grant-makers. Our mission is to support foundations to be ambitious and effective in the way that they use their resources for social good. We have over 400 members, including small and local family trusts as well as some of the world's largest foundations, and everything in between.

ACF has come to the end of the term of its current five-year strategy, having extended it for a year whilst the disruptions and change caused by the pandemic were at their peak. Over the last five years we have developed the support we offer to members, increased our influence and grown. We are ready now to look ahead to how to build on this success over the next five years.

As we now embark on a strategy review, we want to ensure that the process is strong; that staff, trustees and members are engaged; and that the strategy enables ACF to continue to be ambitious and effective in its work to support and enhance the work and impact of charitable foundations.

We worked with Eastside Primetimers (EP) to scope what our strategy review should include and are now looking to appoint consultants to carry out the work and role identified in the scoping exercise. Although we have a strong preference to work within the scope identified, as set out in this request for proposals, we are open to hearing alternative proposals as to how we conduct the review.

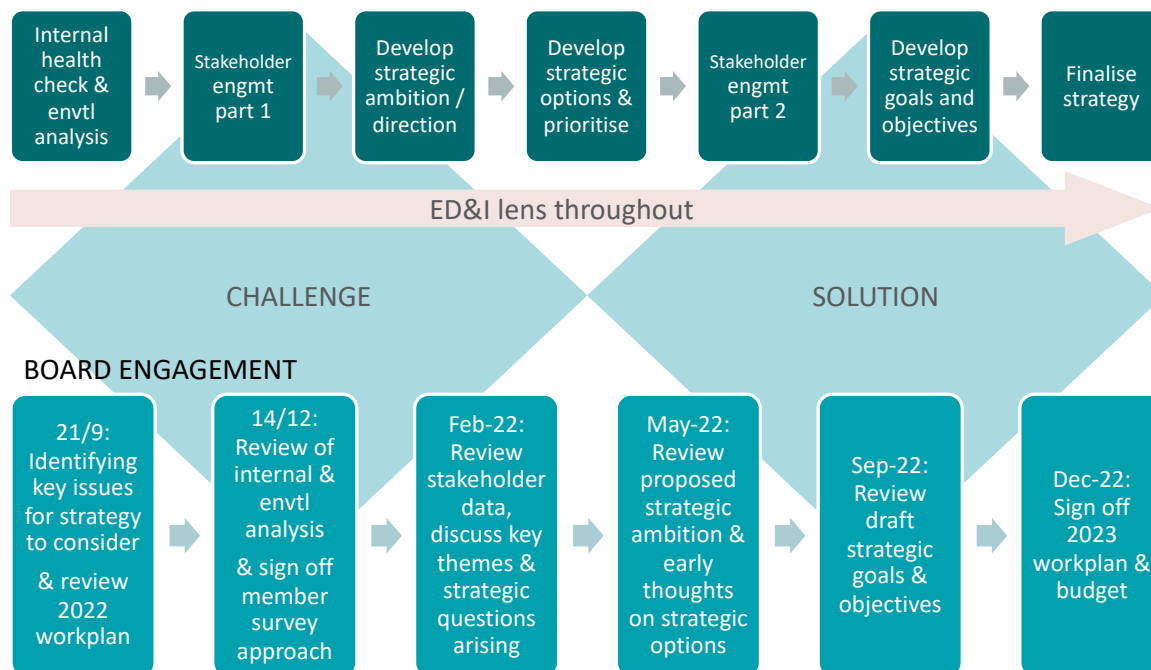
Requirements

ACF would like to develop a strategy that feels owned by staff and trustees and with which members are happy and confident.

Critically the strategy should be developed in an open, evidence-informed and creative environment that enables and encourages key stakeholders to participate. As the strategy is refined trustees would like to be clear about how decisions and choices are being made ie:

the filters used and the strengths and weaknesses of options. The below project plan, developed as part of our scoping process, includes several opportunities for trustees to engage with the strategy process, most of which will likely align with regular board meetings, although with additional time allocated for more in-depth discussion.

Suggested project plan, including Board engagement



ACF is now looking for consultants to support us as we implement the project plan, by:-

- Project managing the strategy review to the agreed timeline
- Structuring, facilitating and writing up discursive sessions and workshops of ACF staff and board
- Developing a stakeholder engagement plan and questions; facilitating and writing up subsequent focus groups/interviews
- Supporting and challenging the data analysis
- Facilitating discussion on purpose, strategic ambition, objectives and prioritisation
- Working with ACF's diversity, equity and inclusion (DEI) consultants to ensure that DEI is at the heart of ACF's new strategy
- Drafting the final strategy document

DEI consultants

ACF is striving to become a more diverse, equitable and inclusive organisation, and to support the foundation sector in its DEI practice. Our approach to this is informed by our Stronger Foundations report on Diversity, Equity and Inclusion, which sets out nine pillars of excellent DEI practice, which we developed in partnership with a working group of members, drawing on a wide range of DEI experts.

We want to apply a DEI lens to our strategy review and to do this are seeking to appoint an expert DEI consultant in addition to this request for proposals. The role of the DEI consultant is to support and challenge ACF to apply a DEI lens throughout the strategy review process. We are conducting a separate exercise to find a partner and the brief we are working to is also on our jobs board.

How to submit a proposal

Please outline how you would support ACF's strategy review, addressing the selection criteria below. Please include details of who will be carrying out the work; a budget and day rate(s) for the work; and indicate your availability to complete the work in line with the timeline outlined above.

Selection criteria

- Approach to review – should be feasible, realistic and deliver what we are looking for
- Experience in supporting organisations to review strategy
- Insights and expertise that you bring to the process
- Grasp of the role of ACF and the issues we face
- Value for money
- Ability to meet timescales
- Experience working with other consultants to deliver an agreed outcome

Budget

ACF has allocated £15,000-£17,000 to this part of the strategy review

Timelines

- Request for proposals by: 9am, Monday 1 November
- Interviews: Friday 5 November

PLEASE RETURN PROPOSALS TO: carol@acf.org.uk