



Request for Proposal for a Short-term Visioning Plan

Purpose

The Blue Ridge Institute, referred to as BRI, is seeking a consultant to lead the Board of Directors and membership through short-term visioning conversations that will lead to a tangible short-term plan. This plan will guide BRI into a future towards a strategic planning process.

Background

BRI has been meeting every summer since 1927. We are the oldest professional development organization for nonprofit professionals. We have a long-standing history of supporting, renewing, and fostering community leadership. We live our tagline of learn, lead, and renew.

We host an annual professional development conference in a beautiful mountain setting away from the hustle and bustle of the working world. This professional development model has sustained the organization and membership for 96 years. As we look toward our centennial, BRI needs to evolve our traditions, footprint, and membership model. We want to grow beyond offering more than an annual conference.

You can learn more about BRI by visiting our website at [Blueridgeleaders.org](https://blueridgeleaders.org).

Qualifications

BRI seeks a consultant with strategic planning and program development experience. While our membership is strong and experienced, the consultant should not be an active participating BRI member in the last four years. The Board of Directors is seeking some outside input and clarity with a consultant familiar with our work, but not too involved in BRI membership.

Timeline

January 2024 - Onboard the consultant and discuss pre-work for the February retreat.

February 2024

- *February 3, 2024* - Host a day at the Board of Directors retreat to guide the conversation around strategic visioning and elicit feedback from the Board of Directors. Location: Charlotte, North Carolina.
- *February 26, 2024* - Summarize the retreat feedback and provide a report to a select

committee for review and feedback.

March 2024 - Gather feedback from the active membership around the retreat ideas generated and gather new ideas. Summarize the information and present it to a select committee for review and feedback.

April 2024 - Host a virtual meeting with the Board of Directors with a draft vision plan to explore the concepts and gather feedback.

May 1, 2024 - Present the final report and present it to the Board of Directors.

June 5, 2024 - The Board of Directors approves the plan.

July 21 - 25, 2024 - The Board of Directors presents the plan to the membership.

Deliverables

- Board Retreat Initial Report is due February 26, 2024.
- Draft Short-term Visioning Plan is due April 24, 2024.
- Draft Short-term Visioning Plan Board Presentation is on May 1, 2024.
- Final Short-term Visioning Plan is due May 29, 2024.
- Final Short-term Visioning Plan Board Presentation is on June 5, 2024.

Proposal

Proposals should be **no more than five pages** and address the following:

- Consultant information and expertise. (15 PTS)
- Detail the approach to each timeline activity. (40 PTS)
- Outline the estimated time for each timeline activity. (10 PTS)
- Data gathering methods, research needs, and deliverables. (15 PTS)
- Budget Details (20 PTS)

Questions and Submission

Questions can be emailed to rfp@blueridgeleaders.org. Proposals are due no later than November 28, 2023, at 5 p.m. They can be emailed to rfp@blueridgeleaders.org. Proposals received after the deadline date and time will not be considered.

Decision

A select committee will review and rate each proposal. A final recommendation will be presented to the Board of Directors on December 6, 2023, for approval. Following the meeting, all parties will be notified of the final approved decision.