



PANO

Where Pennsylvania Nonprofit
Professionals Grow Better Together

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STRATEGIC REFRESH & BUSINESS PLANNING

Request for Proposals

Submit to: Electronic submissions of the proposals are preferred and should be submitted to Anne Gingerich at anne@pano.org.

Organization Information

Vision: PANO envisions an equitable, inclusive community where all individuals are able to reach their fullest potential.

Mission: PANO amplifies the voice, value, and impact of community benefit work to transform lives.

Values:

- *Accountability:* We hold ourselves, and ask others to hold us, responsible for living by and in our values.
- *Bridge Building:* We bring groups and people together to create innovative solutions.
- *Justice:* We mindfully embed justice-based practices into all policies and programming.
- *Respect:* We model appropriate boundaries and listen with empathy to understand the boundaries set by others.
- *Risk Taking:* We are curious and explore new strategies for achieving system change.

Organization Background: PANO is a statewide membership organization supporting the thousands of nonprofits that serve millions of people in the Commonwealth. While other associations cater to specific nonprofit trades, PANO is the only membership organization that supports Pennsylvania's nonprofit sector as a collective whole. We support nonprofits through training, best practices, consultation, and discount programs. We amplify their impact through research, public policy initiatives, and advocacy. PANO is accredited by the Standards for Excellence Institute, signifying that the organization practices the highest level of ethics, accountability, and transparency.

Project Scope: PANO seeks proposals from qualified consultants to guide the board of directors and staff through a process that will review and affirm PANO's existing strategic plan including PANO's vision, mission, values, and desired outcomes. Additionally, the board of directors and staff are most interested in developing a business plan that will support and amplify the work that is in development under the current plan.

PANO's current strategic plan was developed in 2020, just as the world began to experience major shifts in society that have proven to have a significant impact on the nonprofit sector in Pennsylvania and the people those organization's serve. We believe that much of our current plan remains relevant and with minor adjustments, could be reaffirmed for another 3 years. More importantly, we need to develop a business model that provides the resources and staff needed to carry out the mission of the organization and the goals set forth in the current strategic plan. PANO would also like to explore opportunities including:

- Reaffirming the current strategic plan with some adjustments, accounting for changes and needs in the nonprofit sector.
- Establishing a business and revenue model that will sustain and grow the work.
- Evaluating current work streams to assess program effectiveness alongside revenue.
- Identifying new work streams, if needed, that are mission aligned, address current needs, and produce revenue.

Project Duration

It is expected that plan will be completed and approved at the November 16, 2023 PANO Board of Directors meeting.

Proposal Guidelines and Requirements

- 1) Firm/Consultant profile, including core values.
- 2) Detailed description of your approach and process, including ideal relationship with a client, work plan, and timeline.
- 3) Detailed fee proposal outlining deliverables and timeline.
- 4) Summary explaining succinctly why your firm is most qualified, including past experience with nonprofits.
- 5) Three references that have used your services for a similar project.

This RFP does not commit PANO to award a contract or to pay any costs incurred in the preparation or submission of proposals. PANO reserves the right to reject any or all proposals received in response to this RFP and to negotiate with any of the vendors or other firms in any manner deemed to be in the best interest of PANO. Selection of the successful proposal will be made based upon the bidder's:

- Responsiveness to work scope and program needs
- Demonstrated experience and expertise in similar project
- Cost and time effectiveness

Budget

The total budget for this strategic planning project is \$24,000. If your proposed budget exceeds this amount, please explain why.

Proposal Schedule

Proposals will be reviewed on a rolling basis until a consultant has been selected – starting immediately.

Contact Information

Questions regarding this RFP should be submitted to: Anne Gingerich at anne@pano.org.