



Strategic Plan Request for Proposal

Introduction

St. Martin Center, Inc. is a human service and educational 501c3 organization in Erie, PA. The agency has 50 employees across its two locations with an operating budget of \$3.7 million. Its main programs are the STAR 4 Early Learning Center and Self-Sufficiency. It is affiliated with Catholic Charities of the Roman Catholic Diocese of Erie, and it is funded by a combination of grants, fee for service activities, tax credits, donations, and fundraising events.

Background

The agency has a positive and fun culture, but the staff are also committed to impactful and client-centered assistance. Our mission and vision, solidified at our 2017 strategic process, are as follows:

***Mission:** Strengthening lives and supporting our community by providing immediate assistance, education, and long-term services, consistent with our Catholic values.*

***Vision:** All people have access to the resources they need to reach their goals.*

The agency has a unique role in that it does not clearly fit as a “housing” provider or a “daycare.” Rather, St. Martin Center has grown beyond its basic needs’ roots into a respected provider of emergency assistance, early learning, information and referrals, and long-term services like financial assistance, homeownership, and financial wellness counseling. Please refer to our website, www.stmartincenter.org, for more detail regarding our programs and outcomes.

With COVID in its rear-view mirror, the organization is ready for its next 3-year strategic plan which should provide a blueprint for deeper impact while enhancing the financial sustainability of the organization.

Consultant Qualities/Scope of Work

St. Martin Center, Inc. is looking for a consultant with a proven track record of strategic planning facilitation. Ideally, the consultant must provide samples and/or references of past clients who may speak of the quality of the proposed work.

Additionally, applicants must be well-versed in nonprofit best practices for similar-sized organizations. Preference will be given to those experienced with Catholic nonprofits, having fundraising expertise and those who can provide analysis around the areas of constraints, alignments, or new markets.

The proposed scope of work is as follows:

- Creation of a strong **theory of change** linking the agency's programs
- **SWOT** and/or similar organizational/environmental analysis to evaluate operations, staffing, programs, communications, fundraising and, culture
- Robust stakeholder **analysis** and **interviews** including staff, donors, clients, funders, board members, etc.
- Review of current client **impact** stories and/or other **outcome** reports as necessary
- Final **written 3-year plan**

Successful applicants should demonstrate a written plan/process to obtain the information listed above. The selected consultant will work with the Strategic Plan Committee and present the final plan to the board of directors for their approval at the April 29, 2025 virtual meeting.

Timeline

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| • Issue RFP | October 14, 2024 |
| • Questions/Prospective Interviews | Due – 2-3 weeks after RFP issued |
| • Proposals Due | November 11, 2024 |
| • Firm Selected | 1-2 weeks after proposals due |
| • Strategic Plan development | November 25, 2024- April 28, 2025 |
| • Final Presentation to Board of Directors | April 29, 2025 |

The selected firm should anticipate a 6-month period for the scope of work commencing 1-2 weeks after the board of directors approves the project consultant.

Application/ Selection Process

1. Firm background including staff bios
2. Narrative Proposal, Executive Summary, Schedule of approach including Fees
3. (3) References Including a past Scope of Work performed (Ideally similar organizations/scopes)

The Selection Committee will shortlist the proposals and select a final candidate. Additional interviews may be necessary. CEO will sign final contract after approval by the St. Martin Center board of directors.

Upon award, the organization will make any information, research and any other documents requested available.

*All Responses must be emailed and be received by **November 11, 2024**. Please title the PDF with "RFP: ... Strategic Plan" and the name of your company.*

Please contact David González, CEO, if you are interested in submitting a proposal or schedule an exploratory virtual meeting to discuss. You may reach him at dgonzalez@smartincenter.org or 814-452-6113, ext. 210.