



Request for Proposal (RFP)

**Greater Milwaukee Foundation
2153 N Dr. Martin Luther King, Jr. Drive, Suite 4000
Milwaukee, WI 53212
414-272-5805
Strategic Plan Consultation**

Timeline

RFP Release Date	February 28, 2025
End of Q&A Period	March 14, 2025
Proposal Submission Deadline	March 28, 2025
(Virtual) Interviews with Finalists	April 21 – 28, 2025
Notification of Award of Contract Process Begins	May 5, 2025
Anticipated Launch	June 2, 2025

About The Greater Milwaukee Foundation

With more than \$1 billion in assets, the Greater Milwaukee Foundation is Wisconsin's largest community foundation and was among the first established in the world. The Foundation turns 110 years old this May and is completing its current five-year strategic plan, 2020-2025, titled [A Milwaukee for All](#).

Reputational Background

As an anchor, philanthropic institution serving generations of donors, the nonprofit community, and partner organizations in our regional area, the Greater Milwaukee Foundation is fortunate to uphold a long-standing and credible reputation, both locally and nationally. Data tells us that the Foundation is most often seen as a knowledgeable, trusted source for information, collaboration, and effective convener at the heart of civic community. Helping donors achieve their greatest philanthropic impact, elevating the work of changemakers across neighborhoods, and bringing people and organizations together as a catalyst to help our region thrive is at the core of our vision (though the current vision/mission/values statements do not consistently align to reflect the growth of our expanding community leadership role and aspirational model for change, i.e. [community foundation leadership framework](#)). The Foundation is fortunate to have a record of strong governance structure and is guided by an engaged, diverse and respected [Board of Directors](#).

Budget and Philanthropic Impact

In 2023, the Foundation invested over \$56.7 million in the community through grantmaking vehicles. Board-directed grants totaled \$10.9M. Donor-recommended grants, made up the majority at \$45.8M. As a community foundation, we leverage our diverse philanthropic toolkit to bring people together, marshal resources and expand community knowledge to achieve the greatest possible impact for our many community stakeholders.

Recent Transformational Community Leadership

Especially over the past five years, the Foundation has propelled itself locally and is recognized nationally in the community foundation field. Notable innovations and effective strategic initiatives include:

- Advancing racial equity and inclusion systems change work in early childhood education through its [Milwaukee Succeeds](#) collective action focus and national partnership;
- Pioneering a targeted comprehensive [Greater Together Campaign](#) (largest in our city to-date and first in the Foundation's history) that completed in 2023 with an unprecedented \$726.8 million-dollar result aligning dollars and donors in strategic giving and impact as well as bringing a substantial number of new donors and funds to the Foundation;
- Igniting community philanthropy partnerships such as its flagship, [ThriveOn King](#) placed-based community development model. The Foundation's catalytic partnership with the Medical College of Wisconsin and real estate developer, Royal Capital centered resident voice, renovated a landmark historic building along Milwaukee's Dr. Martin Luther King

Drive, developed a 1st floor energized community hub dedicated to creating economic, health, art and social cohesion opportunities for residents and the entire community to come together in and thrive. In addition to making this building the new home of the Foundation on the 4th floor, the Foundation extended more than \$40 million in grants and other capital into the 3 surrounding neighborhoods, Milwaukee's treasured and historic Bronzeville community, which had been disinvested in, a result of decades of racial systems and inequities.

2020-2025 Strategic Plan and Community Vision, A Milwaukee for All

At the direction of the Board, the Foundation launched a bold, shared community vision and placed racial equity and inclusion as its North star. The transformational approach to drive generational change was data-driven around greatest disparities and centered in community and wide stakeholder voice. The environmental landscape of 2020 thrust the Foundation into a doubling-down mindset and community response mode of action around the dual public health crises of COVID and systemic racism following the murder of George Floyd and heightened racial reckoning. It is noteworthy that in 2016, the Foundation Board made a generational commitment to advancing racial equity and inclusion.

In preparation for building the 2020-2025 strategic plan, extensive stakeholder input was conducted beginning in 2017 with 3 years of convening On the Table communitywide gatherings, targeted focus groups, in-depth interviews, and visioning sessions. The authentic voice of broad stakeholders about interconnected issues, Greater Milwaukee assets and known disparities and inequities formed the themes for systems change within the Foundation's 2020-2025 A Milwaukee for All strategic plan and [shared community vision](#). The plan named racial equity and inclusion as its North star. Importantly, the plan stretched the Foundation to work differently with all partners to achieve greater impact together. The Foundation retooled itself as a community leader leaned in to [reimagining philanthropy](#), [catalyzing systems change](#), [convening and following community voice](#), and [building inclusive culture](#) as pillars to transform our region to be more inclusive and relevant for greater change today and future. Within the strategic plan, the community impact areas initially named issue priorities, early childhood care and education, economic inclusive opportunity, affordable housing, inclusive culture (and later the ThriveOn King development). The strategic vision and plan did not sit on a shelf. It stayed alive in our constant building of practice and operations as well as our external engagement and communications. [A progress report](#) was issued in June of 2024.

New CEO Named to the Foundation in June

Last year, June of 2024, the Foundation named Gregory M. Wesley, JD as its new [President and CEO](#). Greg joined the Foundation as a deeply connected and respected community leader, former Foundation Board member and Sr. Strategic Leader for the Medical College of Wisconsin (their leading partner and a visionary of ThriveOn King). Since his August 1 start date, Greg has been a well-received president and CEO who has been highly active meeting with more than 200 cross-sector stakeholders including staff, donors throughout the region, civic leadership

and groups, nonprofit partners, neighborhood residents, business leaders, and regularly with legislators including the Mayor, County Executive and Governor.

Project Overview

The Foundation is interested in a strategic plan leader, not a facilitator. We are seeking a partner to work with us where we can be effective in raising significant awareness around issues and community needs and where we can build on inclusion, momentum, and the deep passions of our diverse stakeholders toward a shared impact. The Foundation holds a big responsibility, as such does the opportunity for partnership in leading a sharp strategic planning process that focuses our future on bold results.

Scope of Work

- Evaluate the current mission, vision, and values statements to ensure they reflect the organization's values and aspirations. Work with stakeholders to update or reaffirm these statements, as necessary.
- Provide guidance and mentoring to all partners in the process, including holding meetings and strategy sessions as needed to meet our objectives in the planning process.
- Conduct an environmental scan:
 - **SWOT Analysis:** Facilitate sessions to identify the organization's strengths, weaknesses, opportunities, and threats.
 - **Market Research:** Analyze industry trends, challenges, and opportunities that may impact the organization.
 - **Benchmarking:** Compare the organization's performance and practices against similar organizations to identify best practices
- Conduct a key stakeholder analysis:
 - **Interviews:** Conduct interviews with key stakeholders (e.g., board members, staff, institutional and individual donors, grantee partners, peer organizations, civic leaders, community members) to gather insights and perspectives.
 - **Focus Groups:** Organize focus group discussions to explore specific topics in depth and encourage dialogue among different stakeholder groups.
 - **Surveys:** Design and distribute surveys to collect quantitative data on stakeholder opinions and perceptions regarding the organization's goals and performance.
- Provide monthly progress reports to the Strategic Planning Committee and key staff, and at periodic meetings with all staff and key stakeholders to incorporate input and report findings and recommendations.
- Create a detailed implementation plan that outlines how the strategic plan will be executed, including timelines, roles, and responsibilities for all involved parties.

- Assist management to create a system of monitoring, reviewing, and adjusting the strategic plan as needed.
- Establish measurable strategic goals that align with organizational key performance indicators and provides opportunity to track progress with milestones.
- Compile all findings, analyses, and recommendations into a cohesive strategic plan document that includes:
 - Executive summary
 - Background and situational analysis
 - Strategic goals and objectives, measurements
 - Action plans
 - Evaluation and monitoring framework
- Provide consultation from the current strategic plan to bridge to the next plan rollout period.

Deliverables

List of measurable items expected from the consultant, including interim and final reports and presentations.

The final presentation should include a strategic plan that articulates clearly defined goals, measurements to monitor progress toward goals, tactics to guide work plans and accountabilities for meeting goals. The plan should be inclusive of:

- An operational plan with sufficient detail for implementation by the staff and necessary resources to execute including recommendations.
- An initial set of metrics by which leadership and the Board of Directors will ensure accountability for successful implementation.
- Year-by-year phased roadmap of goals, with milestones.
- A comprehensive strategic plan document, including an executive summary.

Minimum Qualifications

The firm or individual submitting a proposal for this work should have at least three (3) years providing consulting services for similar projects. Describe any other qualifications relevant to the project.

Proposal Guidelines

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until March 28, 2025. Proposals received after this deadline will not be considered. All proposals must be signed by an official agent or representative of the firm submitting the proposal.

All proposals must contain a scope of work that describes how the consultant will perform all the activities required to complete the work to be performed and the anticipated timeline. The cost of all activities should be depicted in the budget section of the proposal. All costs must be itemized to include an explanation of all fees and costs for services and resources provided by the proposer.

The contract's final scope of work, terms and conditions will be negotiated with the chosen qualified responder. Upon selection of the consultant, GMF will prepare an Agreement incorporating the consultant's proposal detailing the scope of work, fees and schedule with any changes mutually agreed upon. The Agreement will include provisions for payment terms, insurance requirements, conflict of interest disclosure, confidentiality, independent contractor status, ownership of work product and other standard contract terms.

Responding to this Request for Proposals

Please submit the following with your proposal, recommended not to exceed 12 pages:

- A detailed work plan and timeline for the Strategic Plan.
- A budget detailing all fees and expenses to complete the project.
- Description of experience of consultant and/or consultant team in strategic planning and organizational development consulting, including types of organizations as clients and types of projects.
- Description of your approach to developing a strategic plan and the process intended for its creation. This includes any anticipated involvement/support by GMF staff.

Please also submit the following as attachments:

- Examples of past strategic plans created by the respondent.
- Completed GMF Racial Equity and Inclusion Survey (attached)
- At least three (3) references – Include organizations with names/contact information with whom we can discuss comparable projects you have completed in the past.
- Bios for any anticipated key personnel you will assign to this project.

GMF respects your professional privacy. Any proprietary information revealed in the proposal should, therefore, be clearly identified as such. Please feel free to redact any information deemed appropriate.

The selected contractor will be required to demonstrate proof of insurance sufficient to protect all parties involved in the performance of the scope of work. Provide specific information on the termination of any contract you have been involved in (for default), litigation, settled, or judgments entered within the last five years involving your firm, joint venture partners, or sub-consultants. Also, provide information on any convictions for filing false claims within the past five years.

GMF has a commitment to racial equity and inclusion and expects that consultant teams desiring to work with the Foundation will reflect this commitment in the composition of their teams. Attached to the last page of this RFP is a Racial Equity Inclusion Survey. Please complete and submit this survey along with the proposal.

Proposal Submission

All proposals must be submitted electronically in a pdf format to mmiller@greatermilwaukeefoundation.org with the subject line: *Strategic Planning Consultant*. Proposals will be accepted up to midnight on March 28, 2025.

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Questions

Consultants interested in responding to this opportunity will have until March 14, 2025, to engage with a subset of the strategic planning team to ask clarifying questions. If interested in scheduling a time for questions, please send an email to mmiller@greatermilwaukeefoundation.org with the subject line: *Strategic Planning Consultant Questions*.

Rejection of Consultant’s Proposal

GMF has the right to reject any or all proposals, to waive any non-material informality or irregularity in any proposal received, and to accept the consultant’s proposal deemed most favorable to GMF after all have been examined and evaluated. In addition, GMF has the right to reject a proposal if the consultant’s proposal is incomplete or irregular or does not meet the criteria outlined in this document.