

# Strategic Planning

Request for Proposal

December 8, 2020

## Contact Information

Bryan Murphy-Eustis

Vice President, Programs

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617-682-5766

## Purpose

The Max Foundation seeks a consultancy that will assist our team in crafting our five-year strategic plan (FY22–26) so our organization is best positioned to maximize our impact on patients around the world. Our organization is deeply committed to supporting a strategic planning process that will actively engage our organization in thinking about the future and planning for the sustainable delivery of our programs. We are entering a period of growth and change and would like to be deliberate about the directions we choose in the most ambitious yet practical and inclusive way possible.

Therefore, the purpose of this Request for Proposals (RFP) is to solicit proposals from consultants experienced in strategic thinking and planning particularly in global health nonprofit work. The Max Foundation seeks a consultant to provide the following services:

1. Work with the Internal Strategic Planning Committee, comprised of current organizational leadership to articulate a clear and strategic framework and process as a part of a strategic plan for The Max Foundation.
2. Conduct and report on findings of research that may include:
  - a. Small scope internal and external surveys to evaluate The Max Foundation's programs and operations
  - b. Interviews and/or focus groups of a cross-section of current and former staff, board members, donors, and partners;
  - c. Current and historical research of the global landscape affecting our work.
3. Assist in evaluating the alignment of the organization's written mission, vision, and goals/objectives.
4. Establish a framework and process for the organization to operationalize the strategic direction, and create a resulting plan.
5. Facilitate strategic planning meetings and provide leadership, direction and expert consultation and advice related to the strategic planning process.
6. Deliver a clear, easily-operationalized, measurable, and strategic 5-year plan.

## Background

The Max Foundation is a non-profit global health organization that believes all people living with cancer deserve access to the best treatment, care, and support. We decrease premature mortality from cancer by channeling humanitarian donations of lifesaving oncology products to underserved populations in countries where those products are not locally available. By partnering with the major cancer institutions and patient associations in low- and middle-income countries, we enable effective solutions for access to treatment. Founded in 1997, The Max Foundation began as a grassroots organization with several volunteers has evolved into a specialized team of more than 50 professionals. We carry out our work with team members based in Seattle at our headquarters and in many targeted low- and middle-income countries. Through the years, we have expanded our mission. The Max Foundation now has a full range of programs and services, all focused on serving people living with cancer around the world. Learn more about The Max Foundation: <https://www.themaxfoundation.org/>.

## Scope of Project

The consultant should listen and articulate in writing the mutual expectations of not only the internal Strategic Planning Team but also those of the Board of Trustees, senior staff, and other key stakeholders and will:

- Guide the creation and implementation of a long-term organizational strategic framework and plan;
- Monitor and report the progress of the strategic framework; and
- Fully integrate The Max Foundation staff, board, volunteers, and members into a culture of collaboration focused on a shared vision through the strategic planning process; and
- Deliver an agreed-upon end product that reflects our expectations and an understanding of operationalization and implementation.



## Timing

The selected applicant will present the final products to the Strategic Planning Committee of The Max Foundation in the 3<sup>rd</sup> quarter of 2021. RFP Schedule and Submission Details:

RFP Issued	December 8, 2020
Questions/clarifications due	December 18, 2020
Answers provided by	January 5, 2021
<b>Proposals due</b>	<b>January 11, 2020</b>
Finalists notified	January 14, 2021
Interviews with finalists	January 18-22, 2021
Decision announced	January 27, 2021
Work begins	February 1, 2021

## Instructions to Applicants

Please direct all questions and proposals via email to:

Bryan Murphy-Eustis  
Vice President, Programs  
The Max Foundation  
[Bryan@themaxfoundation.org](mailto:Bryan@themaxfoundation.org)  
617-682-5766



## Required materials

Provide the official name, address, phone number and email address of the applicant (organization or individual) as well as the name of the principal contact person and the name and title of the person authorized to execute the contract.

Bios/resumes of key personnel fulfilling the contract, if awarded, including key qualifications and previous similar work experience.

A description of the applicant's approach to strategic planning consultation, including methodology, perspective or philosophy that guides your work. Include all relevant experience with global health non-profit strategic planning.

Provide a comprehensive work plan, including a timeline and a budget for completing the project.

Proposals must be signed by an authorized individual(s) of the applicant organization and include the name, title, address, telephone number and email address of the individual(s) with authority to negotiate and contractually bind the individual/organization.

All proposals received will be considered in final format.

## Review of Proposals

The review team will consist of members of The Max Foundation's Leadership Team as well as the Founder & CEO.

We expect to make a final decision on this matter no later than January 15, 2021, with notification to applicants occurring soon thereafter.

We will review proposals in accordance with the following weighted criteria:

- The proposed approach to the scope of work
- Experience leading global health non-profit strategic planning processes.
- The level of experience of the individual(s) identified to fulfill the project
- The individual's/organization's experience with similar projects
- The total proposed cost



## Conflict of Interest

Applicants agree that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and The Max Foundation. Any perceived or potential conflict of interest must be disclosed in the proposal.

## Contractual Agreement

The Max Foundation will issue a contract/letter of agreement with the selected applicant, in which the manner and time of payment will be addressed.

