



# Request for Proposals for Strategic Planning

## Purpose

The [Tracy Family Foundation](#) (TFF) is seeking a consultant to guide the foundation in the development of a 2025-2029 Long Range Strategic Plan.

## About the Tracy Family Foundation

TFF was established in 1997 by the 2<sup>nd</sup> generation of the Robert and Dorothy Tracy family to advance innovative, collaborative, and sustainable change in Brown County, Illinois and the surrounding region through organizations that share the values of family, faith, education, leadership, and community. TFF seeks to cultivate a philanthropic spirit in all generations of the Robert and Dorothy Tracy family by providing opportunities for the family to give and serve together.

TFF is funded by [Dot Foods](#), the nation's largest food industry redistributor offering 123,000 products and delivering them in less-than-truckload quantities to distributors in all 50 states and 39 countries. TFF is experiencing significant growth. In 2023, TFF awarded \$8,243,497 in grants. In 2024, TFF plans to award \$10,384,500 in grants.

TFF's Focus Areas are Education, Families, Youth, Mental Health, and Brown County, IL. TFF also has a robust Capacity Building program that helps organizations improve and Tracy family engagement programs designed to develop a philanthropic spirit in all generations of the Tracy family. TFF's primary funding region is in West Central Illinois, but TFF has programs that provide funding in other parts of the United States where Tracy family members live.

TFF is governed by the 10-member TFF Board, which includes 2<sup>nd</sup> and 3<sup>rd</sup> generation Tracy family members and two non-family members. The TFF Staff manage the day-to-day operations of the foundation.

More information about TFF and our work can be found on our website and in our most recent [Annual Reports](#).

## Strategic Planning Background

TFF's most recent [Long Range Strategic Plan served 2020-2024](#). The Tracy family also established a 20-year plan (2019-2038) that was the result of reflection on TFF's first 20 years and the development of broad strategies for how the TFF's next 20 years might be different with Tracy family growth, greater geographic dispersion, and increasing assets. These documents will form a starting point for TFF's 2025-2029 strategic planning process.

During TFF's previous planning process, TFF gave considerable effort to its vision, mission, values, and the development of theories of change for each Focus Area. Though nothing is untouchable, the scope of work for the 2025-2029 plan should begin from this foundation and not seek to recreate the work. The priorities for the new planning process include the development of innovative and impactful strategies across all TFF Focus Areas, the addition of philanthropic services for Tracy family members, long-term and short-term measurable goals, staff and operational needs, outcome data collection and monitoring, resource allocation, and communication.

The TFF Board has determined that the [TFF Staff](#) will serve as the Long Range Strategic Planning Team, but the strategic planning process will include opportunities for input from the TFF Board, Tracy family, and TFF grantees.

## Who Should Respond

TFF seeks a consultant with demonstrated experience successfully developing non-profit organization strategic plans, strong communication skills, innovative thinking, and a clear understanding of the dynamics of growing multi-generational family foundations.

## Scope of Work

TFF expects this project to include:

- Review of TFF's 2022 and 2023 Annual Reports (in production), 2020-2024 Long Range Strategic Plan, 2019-2038 20-year plan final report, and Tracy family philanthropic services plan
- Management of the Long Range Strategic Planning process with TFF President
- A mix of virtual and in-person meetings with TFF Staff in Mt. Sterling, IL or St. Louis, MO
- Drafting of survey tools to solicit feedback from TFF grantees and Tracy family members

## Deliverables

At the conclusion of this project, TFF expects to have:

- An actionable 2025-2029 strategic plan, including measurable indicators of success across all Focus Areas and grant programs, staff support structure, and budget
- A professional, visually appealing one-page 2025-2029 strategic plan summary
- A strategic plan dashboard that includes editable fields for indicators of success tracking throughout the life of the plan
- Process recommendations for the strategic plan's implementation and execution

## Timeline

Activity	Desired Time Frame
Issue RFP	April 9, 2024
Proposals due to TFF	April 29, 2024
Review of Proposals	April 29-May 3, 2024
Interviews of Finalists	May 6-May 17, 2024
Proposal Decision	By May 24, 2024
Development of TFF Long Range Strategic Plan	June-December, 2024
2025-2029 Long Range Strategic Plan approved by TFF Board	January/February 2025

## Proposal

TFF expects submitted proposals to include:

- Understanding of the work to be performed
- Brief history of the organization or consulting firm
- Contact information, with an explanation of the relevant professional experience and expertise of everyone that will participate in the project
- Explanation of the methodology and a timeline for the project, including an estimate of hours
- Total fees and expense estimates, including travel and incidental costs
- Anticipated roles of TFF Staff, TFF Board, and Tracy family members
- 3 references of current or past clients, including their name, address, email, and phone number
- 2 Long Range Strategic Plan examples, preferably for family foundations, in which you facilitated the development of the plan
- Any other pertinent information that would help TFF understand the value of your services

## Proposal Submission

Please submit your proposal via email to Dan Teefey, President of the Tracy Family Foundation, by Monday, April 29, 2024.

Dan.Teefey@TracyFoundation.org

If you have any questions, please feel free to contact Dan Teefey via the email above.