



# Best Consultants

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## **Proposed Scope of Work for Organization XYZ**

### Statement of Understanding

In its XX-year history, Organization XYZ has only had XX executive directors with the latest transition taking place in 2015. Cheryl Jackson came on board as the new Executive Director, replacing the previous ED who had been successfully leading Organization XYZ for more than XX years. This executive transition, along with the departure of several of the organization's most senior staff, has brought about a significant change in the leadership of the organization. Other external changes in the political and policy environments also demand a critical examination of Organization XYZ's organizational identity – its primary constituents, body of practice, financial sustainability model as well as its overall programmatic strategies and direction for the next three years.

### Scope of Work

There are four proposed phases to this organizational strengthening and strategic planning process:

1. Alignment of a new leadership team and articulation of values, cultural norms and overarching direction
2. Organizational strategies, identity and examination of the external environment
3. Program and operational planning
4. Fundraising assessment and planning

The table below outlines key activities and deliverables associated with each of the four phases as well as a proposed timeline:

Phases	Activities	Deliverables	Timeline
Leadership Alignment	<ul style="list-style-type: none"> <li>• Meet with ED and members of the senior team and Board to understand the current culture and staff dynamics; Board members may be interviewed one-on-one</li> <li>• Co-design, plan and facilitate a 1.5-day leadership team retreat to articulate leadership and team values, norms, vision, and overarching organizational strategies</li> <li>• Meet with the Board to align leadership values, norms and overarching organizational strategies</li> <li>• Produce summary meeting notes</li> </ul>	<ul style="list-style-type: none"> <li>• A clearer understanding of internal leadership dynamics, assets, challenges</li> <li>• A clear and unified set of leadership values and culture frame that will help provide a positive guide for the strategy formation process</li> </ul>	April – May 4 days
Strategy Formation	<ul style="list-style-type: none"> <li>• Design, plan and facilitate two strategy retreats of staff and board members to clearly define and articulate organizational identity, including primary and secondary constituents, body of practice, desired impact and results, evaluation criteria, strategy screens, sustainability model, and key program trajectories</li> <li>• Conduct 6 – 8 interviews with external stakeholders on key questions identified in the strategy formation retreats</li> <li>• Facilitate a series of leadership team meetings to hone organizational identity using stakeholder input</li> <li>• Produce summary notes of decisions reached</li> </ul>	<ul style="list-style-type: none"> <li>• A clear and aligned view of the organization’s strategies and identity that distills staff and board’s perspectives of Organization XYZ’s assumptions about the external landscape, niche, desired impact, programs and how it will measure results</li> <li>• Feedback from a key set of external stakeholders will inform the organization’s strategies</li> <li>• A succinct 10-page strategic plan</li> </ul>	May – June 6 days

Fundraising Assessment and Planning	<ul style="list-style-type: none"> <li>• Conduct an assessment of Organization XYZ's past and current fundraising practices</li> <li>• Update fundraising model based on its strategic plan, including reviewing and its case statement, donor and funder outreach strategies</li> <li>• Build the capacity of its fund development staff to research donor and funder prospects</li> </ul>	<ul style="list-style-type: none"> <li>• A clear assessment of the organization's fundraising strengths and gaps</li> <li>• An updated case statement for donor and funder development based on new organizational strategies, including core messages</li> <li>• Increased capacity of development and leadership staff members to raise funds</li> </ul>	June – July 10 days
Program and Operational Planning	<ul style="list-style-type: none"> <li>• Meet with three of XYZ's program teams to develop a logic model that correspond to the organizational identity and strategies</li> <li>• Define and articulate desired outcomes, key constituents, and program strategies and activities for 2019 - 2020</li> <li>• Strengthen the staff's capacity to refine its program logic models over time</li> <li>• Provide troubleshooting and coaching</li> </ul>	<ul style="list-style-type: none"> <li>• Clear, succinct logic models for three of XYZ's main programs</li> <li>• Coaching support for staff in the development of the logic models</li> </ul>	June – July 10 days

Project Budget

1. Consulting Time

Total project estimate = 30 days @ \$XXXX/day, inclusive of all supplies, materials, local travel  
\$XX,XXX

2. Leadership Retreat Offsite

8 people x 2 days @ \$XXX/day  
\$X,XXX

3. Strategy Retreat Expenses

25 people x 2 retreats x \$XX/per person per day  
\$X,XXX

Total project budget = \$XX,XXX