



Request for Proposals: Strategic Plan Facilitation

Illinois Public Health Institute

Overview

Illinois Public Health Institute (IPHI) is seeking proposals from qualified and experienced consultants or consulting firms to facilitate the development of a forward-looking, equity-centered, and comprehensive organizational strategic plan. Qualified consultants or consulting firms are invited to submit a proposal to IPHI by September 2, 2025. The selected consultant/consulting firm will facilitate a process that results in a dynamic, actionable 3–5 year strategic plan aligned with our mission, vision, values, and responsive to emerging priorities, opportunities, and challenges in public health. We encourage all qualified consultants or consulting firms to apply! A description of our organization, the services needed, and other pertinent information follows.

About IPHI

At the Illinois Public Health Institute (IPHI), we collaborate to advance health justice through equitable policy, systems, and institutional change. Our work focuses on empowering communities, strengthening the capacity of community-based organizations, and improving state and local policies to create meaningful change. Our team operates with clarity of purpose to ensure that every person has a fair and just opportunity to be healthy and thrive. Our work spans the most pressing challenges—and the most promising solutions—in public health. We bring together partners across government, healthcare, and communities mobilize cross-sector action and drive measurable change. We support our mission through a variety of strategies, including the convening and facilitation of cross-sector coalitions, training and technical assistance, policy advocacy, community engagement, and information sharing. Our work strengthens public health systems, influences equitable policies, and builds capacity for sustainable change at the community, institutional, and systems levels. Our projects focus on critical areas such as housing and homelessness, food and nutrition, maternal and child health, environmental justice, aging, chronic disease prevention, the built environment, multi-sector data sharing, and more. During 2024, IPHI welcomed a new CEO and adopted a new organizational mission, vision, and values in partnership with the board, key partners and funders. IPHI also has a recently-established subsidiary 509a3 organization that serves as the backbone for the Chicago Regionwide Community Information Exchange (CIE)—a network of health and social service providers who use shared governance, integrated data systems, and coordinated workflows to better support the needs of community members. This RFP is for an overall organizational strategic plan for IPHI, to guide and strengthen programs, partnerships, internal capacity, and impact across our project areas.

Scope of Work

We seek an individual or firm with significant subject matter expertise in systems change, organizational development, health justice, cross-sector collaboration, and inclusive stakeholder engagement—including those with lived experience—to help shape our organizational direction and priorities. The selected consultant or consulting team will lead a planning process that is



inclusive of staff, board and partners and that results in a clear, actionable Three-to-Five-Year Strategic Plan (starting in 2026) to guide and strengthen IPHI’s programs, partnerships, and internal capacity. The seven-month process will begin in Fall 2025.

Responsive proposals should address the following services:

1. Partnership with IPHI Leadership

- Partner with representatives from IPHI Board and Leadership Team on the development of the plan.

2. Plan Synthesis

- Consult with IPHI Board and staff to review and synthesize the 2019–2024 plan, its outcomes, and lessons learned.

3. Stakeholder Engagement and System Assessment

- Conduct an environmental scan to analyze the current public health system landscape to identify opportunities, threats —particularly for historically marginalized communities.
- Design and carry out a stakeholder engagement process (staff, board and partners) with clear documentation and synthesis of input.
- Facilitate strategic planning meetings/retreats and discussions with board and staff.

4. Identification of Strategic Issues

- Use findings from environmental scan and stakeholder engagement to identify strategic programmatic, operational, financial and fundraising priorities for the next 3–5 years to advance our mission and vision.
- Prioritize strategic priorities in partnership with IPHI leadership.

5. Implementation Plan

- Develop goals, objectives, metrics and timeline for each strategic priority.
- Ensure alignment with funding and sustainability strategies.

6. Final Deliverable: Strategic Plan and Implementation Framework

- Deliver a comprehensive, accessible Three-to-Five-Year Strategic Plan starting in 2026, including:
 - Executive summary and another more detailed document that includes the full plan and implementation
 - Summary of stakeholder input and engagement activities
 - Summary presentation to the board and leadership
 - Strategic priorities and key goals
 - Specific measurable objectives, action steps, proposed timelines, and responsible parties
 - Recommendations for internal organizational structure, funding alignment, financial modeling, and system governance
 - Outcome and performance metrics
- The consultant will be the project manager, facilitator and lead author of the strategic plan and related materials.



Consultant Qualifications

The consultant or consulting firm(s) should demonstrate strong expertise in strategic planning. Key qualifications required include:

- Demonstrated experience in facilitating strategic planning process for non-profit organizations, preferably in the health justice and public health sector.
- Knowledge of the challenges and opportunities, and emerging trends within the public health landscape within Illinois and beyond.
- Strong project management skills.
- Strong facilitation and communication skills to maximize engagement internally and externally.
- Ability to work collaboratively with the Board of Directors, staff, external partners and funders.

Proposal Requirements & Submission Guidelines

We seek proposals from applicants who can address the above services. In addition:

1. While IPHI understands that completing this project requires significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables (e.g. facilitating retreats, writing the actual strategic plan, etc.). The consultant will write the final work products or final project deliverables.
2. Applicants are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements for all activities involving their participation. We currently have an all-staff retreat scheduled for late September and can leverage that time for the strategic planning process.
3. Proposals must include a clear description of the applicant's plan to complete all of the project components (e.g., timeline/order the components will be completed, length of time to complete each component, roles, key activities etc.)
4. Applicants must include in their project timelines "check-in" points with IPHI for project status updates and feedback to the consultant. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/call, sending out meeting invites, meeting materials, and writing meeting minutes.
5. In addition to the check-in meetings and/or conference calls, the applicant will be expected to present preliminary findings and recommendations prior to writing the final project deliverables and strategic plan for IPHI Board approval.
6. IPHI will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected will provide IPHI with ongoing coaching to support implementation over the first six months as needed, which will be included in the agreement.



Proposals should include:

- **Cover letter**
- **Table of Contents**
- **Description of Consultant/Consulting Firm**
- **Project Understanding, Approach and Methodology** (2 page maximum): Overall approach to the project, including methodology and project design. This section should address:
 - Approach to inclusive decision-making and efforts to gather stakeholder feedback
 - Approach to data analysis and other information gathering
 - Approach to diversity, inclusion, and anti-racism in strategic planning
- **Project Implementation Plan:** Describe your implementation and work plan. Include the project timeline, proposed activities and services, and a description of the final deliverable(s) and their format.
- **Cost and Fee Schedule:** Itemized project budget, detailing the specific cost for each service, tangible work product, estimated hours and other costs related to the scope detailed in this RFP.
- **References:** Contact information for three (3) references from similar work
- **Qualifications and Experience** (5 page maximum): Qualifications of consultant/consulting firm for the scope of this work and qualifications of lead staff on this project. If using subconsultants, provide a description of each firm that will be part of the team. A Project Manager must be designated and be the principal contact for IPHI. Provide recent examples of similar projects, including stakeholder engagement, facilitation, and consensus-building. Include resumes for key staff in appendix.
- **Sample Work Products (optional):** Attach templates or work samples that exemplify the consultant's proposed approach for this project.

Project Budget: The total budget for this project **will not exceed \$75,000.**

Timeline

Below is the anticipated timeline (subject to change):

- RFP issued: August 14, 2025
- Proposals due: September 2, 2025
- Consultant selected: September 2025
- Project kickoff: September 2025 (Staff retreat scheduled for September 26)
- Plan completion: April 2026
- Coaching to support initial implementation (We expect this to be limited hours in a coaching capacity from April to September 2026.)

Evaluation Criteria

Proposals will be evaluated based on:

- Experience and qualifications
- Proposed approach and alignment with objectives
- Understanding of IPHI's need
- Equity-focused experience



- Timeline and availability
- Cost/value

Deadline and Submission Instructions

The opportunity is a paid contract work arrangement, not a grant funding opportunity.

The due date for submission of proposals in response to this RFP is September 2, 2025. Proposals should be sent electronically as a single PDF attachment with the subject line “Strategic Planning Proposal” to:

Ivette Morla
Executive Assistant to the CEO
Illinois Public Health Institute
ivette.morla@iphionline.org

Questions about this RFP may also be submitted to Ivette. IPHI may not be able to respond to questions about this RFP after September 2, 2025.

Thank you for your interest in fostering the future of the Illinois Public Health Institute!

Late submissions may not be considered.