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A RESEARCH BRIEF FROM STRATSIMPLE WITH BREWER PRATT SOLUTIONS

Before You Write the STRATEGIC PLANNING RFP

What we learned from reading 188 strategic planning RFPs, and what to consider putting in yours.

FOR EXECUTIVE DIRECTORS AND BOARDS PREPARING A STRATEGIC PLANNING RFP

INSIDE THE DATA

62% of organizations don't name a number at all

88% of RFPs require input from beyond the board and staff

21% of RFPs ask for any consultant support after adoption

188
strategic planning RFPs, read and coded

INTRODUCTION

The moment you're in

If you're reading this, odds are one of a few things are happening. Your strategic plan is expiring, you're new in your leadership role, or you're in the midst of a board transition – and the organization is looking for direction on what comes next.

That's not a guess. We read 188 requests for proposals for strategic planning services, issued by nonprofits, associations, foundations, and public agencies, two-thirds of them since the start of 2024. When these organizations explain why they're going to market, a plan at the end of its cycle, and a leadership transition are the reasons they give most. Of course, you could be an organization that has never done a strategic plan or hasn't done one for several years. For some, new circumstances, a changing operational reality, or rapid change in the sector you represent may be necessitating a roadmap forward.

The RFP you're about to write matters more than you might think. Yes, it helps you pick your consultant. It also decides, often incidentally, what kind of plan you'll get, who gets heard while it's built, and whether anyone is still looking at it eighteen months from now.

To help give some perspective to the full spectrum of the good, the bad and the other, we coded what all 188 organizations actually asked for. Budgets. Timelines. Who had to be engaged and how. What the consultant delivered. Some of what we found is useful benchmark material, and some of it is cause for a bit of concern.

THE DATASET

188

requests for proposals for strategic planning services

Issued by nonprofits, associations, foundations, and public agencies. Two-thirds since the start of 2024.

CODED FOR

- Budgets
- Timelines
- Who had to be engaged and how
- What the consultant delivered

Use Section 1 to benchmark yourself against the market. Feel free to steal shamelessly from the rest, and from the one-page checklist at the end, to write a better RFP!

WHAT'S INSIDE

01 What the market asks for · p.3

02 The input gap · p.5

03 The choices gap · p.6

04 The implementation cliff · p.7

05 Plans built to expire · p.9

☐ Steal this page: the checklist · p.10

What the market asks for

The typical process across our 188 RFPs: proposals due about four weeks after release, a planning process expected to run about six months, and a plan meant to last three to five years. Nearly three-quarters of issuers publish their evaluation criteria. When price is scored, it usually carries about a fifth of the total. Four in five want a consultant who has done this work in their sector before.

~4 wks
from RFP release to proposals due

~6 mos
expected length of the planning process

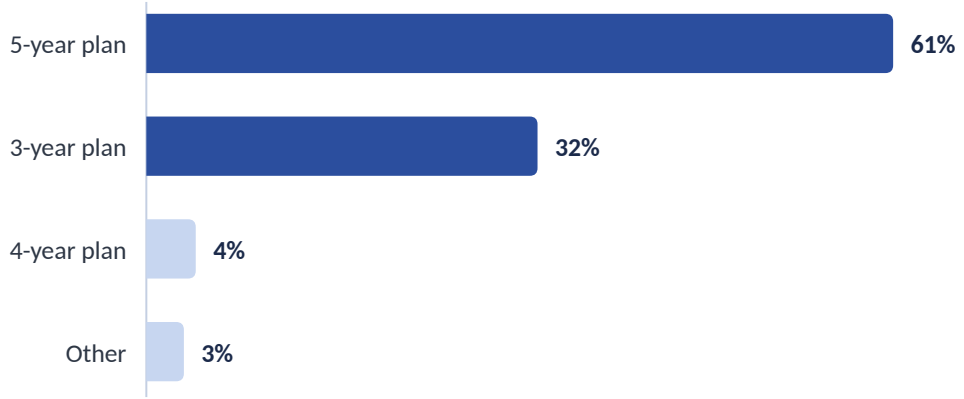
3 to 5 yrs
how long the plan is meant to last

~1/5
of the total, usually carried by price when scored

4 in 5
want a consultant who has done this work in their sector before

How long a plan do organizations buy?

Of the 159 RFPs that specify a planning horizon



Source: StratSimple analysis of 188 strategic planning RFPs

Five years is still the default horizon, but a third of organizations now seek three-year plans. Nobody announced this shift; it just shows up in the data. If your last plan spent its final two years being politely ignored, you're allowed to plan shorter. A third of the market already does and research from BoardSource tells us that moving to shorter strategic time frames and more adaptive planning is where the industry is going – the world is moving too fast to plan too far into the future.[1]

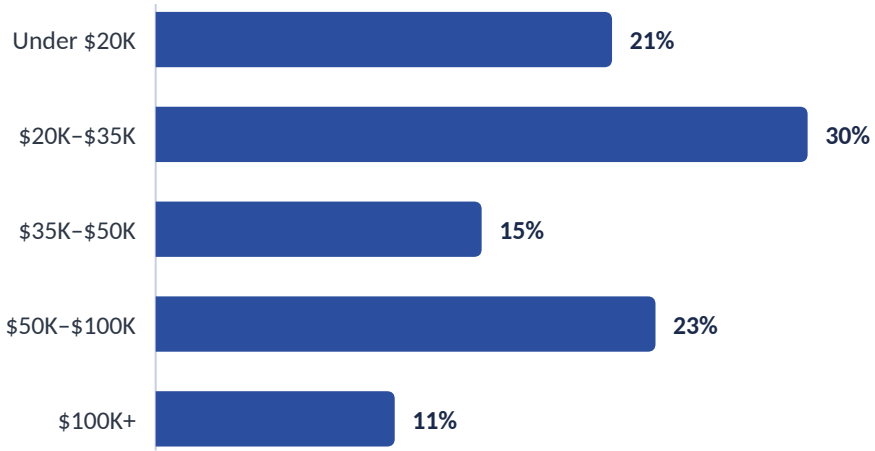
Budgets are where the data goes quiet

62% *of organizations don't name a number at all.*

Among those that do, the median ceiling is $33,000, and the middle half of the market falls between $20,000 and $50,000.

Where budgets land when RFPs name one

Share of the 71 RFPs that disclosed a budget ceiling · median $33,000



Source: StratSimple analysis of 188 strategic planning RFPs

Should you disclose your budget?

Usually, yes. Naming a range doesn't hurt your negotiating position. What it does is filter out mismatched bidders and save everyone a round of discovery calls. Stay silent and you'll get proposals from $15,000 less experienced solo practitioners and $150,000 firms in the same pile.

ONE CAUTION ON THE MEDIANS ABOVE

Disclosed budgets skew toward smaller, tightly scoped engagements. A process with deep stakeholder engagement and real support in year one prices above these numbers, and is usually worth it.

SECTION 2 · ENGAGEMENT

The input gap: everyone wants voices, no one names a number

The most consistent demand in all 188 documents is input from beyond the board and staff. **88% of RFPs require it.** The typical RFP names four distinct stakeholder groups, such as: members, sponsors, partners, staff, board members. Broad listening is no longer a differentiator – it's expected.[2, 3]

Look closer, though, and something odd appears. RFPs are specific about *who* must be heard and strikingly silent about *how many*. Fewer than one RFP in ten states a participation target. When one is stated, the median is 37 people. Thirty-seven. Only 6% ask for engagement in more than one language. And the methods requested (one-on-one interviews, focus groups, a board retreat) often cap out at a few dozen voices no matter how skilled the consultant running them.

> *"Uncover things we might not know we don't know"*
>
> FROM A COMMUNITY MEDIA CENTER'S RFP

That's the input gap: breadth of stakeholders without scale of participation. An organization with 5,000 members commissions a process that will hear from forty people, then wonders why broader community doesn't feel attached to the plan. People will show up for what they helped build.

You can close the gap with one sentence. Name a participation target and make every bidder explain how they'll reach it. The quality of that answer will tell you more than any slide deck. And none of this is an argument against experienced facilitators. Scale gets voices in the room; it takes a skilled consultant to turn what they say into hard choices.

THE GAP AT A GLANCE

88%
of RFPs require input from beyond the board and staff

4
stakeholder groups named by the typical RFP

<1 in 10
states any participation target

37
median participation target, when one is stated

6%
ask for engagement in more than one language

COPY THIS INTO YOUR RFP

"We expect at least XX% of our members, representative of our segments to have a meaningful opportunity to contribute."

SECTION 3 · PRIORITIES

The choices gap: goals without tradeoffs

Most RFPs ask for the right artifacts of clarity. 73% require measurable goals or KPIs. About two-thirds include a mission and vision refresh, and a similar share wants a SWOT or environmental scan.

73%
require measurable goals or KPIs

~2/3
include a mission and vision refresh

~2/3
want a SWOT or environmental scan

58%
ask the process to prioritize

But only **58% ask the process to prioritize** — to focus, to sequence, to decide what the organization will stop doing. Four in ten RFPs never ask for choices at all, and choices are the thing a strategy is actually for.

> *Too often, a plan with twelve co-equal priorities is a to-do list with a cover page.*

In your RFP, ask bidders to describe the moment in their process where priorities get cut, not just set. If the methodology has no such moment, the plan will have no such discipline. The process needs to be intentional about prioritization – you want to hear a question like:

A QUESTION YOU WANT TO HEAR

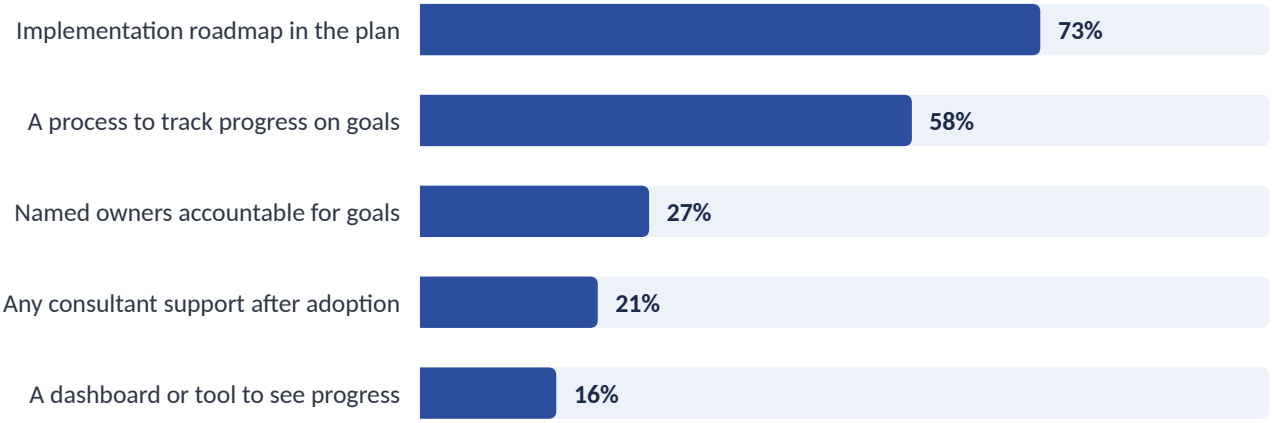
"In year one, what are the five things the organization must get done — not five per goal, five total."

The implementation cliff

This is the finding that made us write this paper. Track what RFPs require as the work moves from planning toward execution:

The implementation cliff

Share of 188 strategic planning RFPs that ask for each element



Source: StratSimple analysis of 188 strategic planning RFPs

Nearly three-quarters of organizations buy a roadmap. **Barely one in five buys any help using it.** Only one in six asks for any instrument, a dashboard or scorecard of any kind, that would let leadership see progress after the retreat is done. In the typical engagement everything ends the day the board votes. The plan is adopted, celebrated, and archived in the same month.

~3 in 4
of organizations buy a roadmap

1 in 5
buys any help using it

1 in 6
asks for any instrument that would let leadership see progress

> *In the typical engagement everything ends the day the board votes. The plan is adopted, celebrated, and archived in the same month.*

The RFPs themselves tell you how this story ends, because half of them reference a prior plan, and the candid ones are sobering. One organization admits its last plan "was not seen to fruition due to staffing changes." Others describe bridge plans, COVID pivots, position statements untouched for a decade. None of these plans failed at the writing stage. They failed later, quietly, in the year after the applause.

> *"The strategic vision and plan did not sit on a shelf"*
>
> A FOUNDATION'S RFP, NOTABLE BECAUSE IT FELT THE NEED TO SAY SO

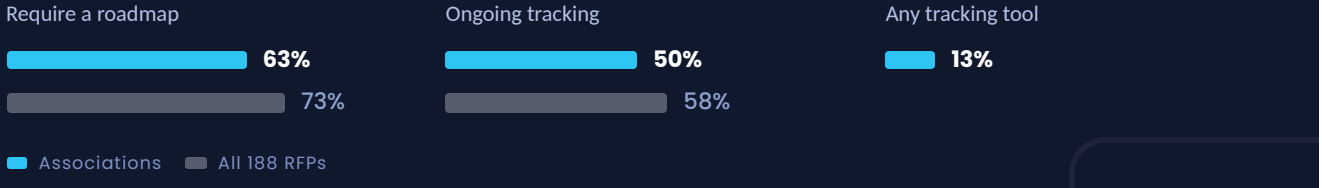
Here's the easiest win we found, and it costs one paragraph in your RFP. Ask every bidder:

COPY THIS INTO YOUR RFP

"What happens after board approval? What will we be looking at, monthly, to know whether the plan is working, and what is your role in the first year of execution?"

Then budget for the answer. A plan with a progress rhythm, with named owners and metrics someone actually looks at, is a different product from a plan without one. The difference in cost is small. The difference in outcome is the whole game.[3]

FOR ASSOCIATIONS



Associations trail the larger nonprofit sector on every implementation ask: 63% require a roadmap (vs. 73% overall), 50% ongoing tracking (vs. 58%), and 13% any tracking tool. For volunteer-governed organizations where board and committee seats turn over every year, execution machinery is how the plan survives its third leadership transition.

SECTION 5 · LONGEVITY

Plans built to expire, and how to build one that isn't

One last pattern, easy to miss: most RFPs treat the plan as a finished object rather than a living one. Only **16% specify any refresh or review cadence** for the new plan. Not an annual review, not a mid-cycle update, nothing. Just 20% use adaptive language of any kind (scenario planning, flexibility, a plan designed to bend), though that share is growing.

The fix, again, is cheap: write the refresh into the RFP. Ask for an annual review protocol as a deliverable. Ask bidders how the plan should bend when the environment does. The 16% of organizations that ask for this are, not coincidentally, the ones describing their previous plans in the present tense.

BUILT TO LAST?

16%
specify any refresh or review cadence for the new plan

20%
use adaptive language of any kind, though that share is growing

IN SUMMARY

What the best RFPs have in common

The strongest RFPs in our stack weren't the longest or the most formal. Each of those is a sentence or two in your draft. The checklist on the next page puts them in order.

01 They named a budget range and a realistic timeline.

02 They set a participation target instead of just listing stakeholders.

03 They demanded real prioritization.

04 They planned to keep the plan relevant from day one.

However you run your process, and whoever you run it with, we hope this saves you a few weeks and a few regrets.

STEAL THIS PAGE

The Strategic Planning RFP Checklist

SCOPE & LOGISTICS

- [ ] State why now (expiring plan, new leadership, growth) so bidders respond to your need, not a generic one
- [ ] Communicate what worked and what didn't about your last plan and process
- [ ] Name a budget range (market median: $33K; most fall between $20K and $50K)
- [ ] Give bidders at least 4 weeks to respond; plan on roughly 6 months for the process
- [ ] Choose your horizon deliberately. 5 years is the default, but new plans often are choosing 3 years
- [ ] Publish evaluation criteria and weights; require sector-relevant experience and references

INPUT — CLOSE THE PARTICIPATION GAP

- [ ] List every stakeholder group that must be heard (market median: 4; include members, staff, board, partners, funders)
- [ ] Set a participation TARGET, not just a list: “at least __% of members have a real opportunity to contribute”
- [ ] Ask each bidder HOW they'll reach that number (interviews and focus groups often cap out around 40 people)
- [ ] Require engagement in the languages your community actually speaks, if that's more than one
- [ ] Staff is involved in building the plan, not just providing input to the listening process

PRIORITIES — DEMAND CHOICES, NOT LISTS

- [ ] Ask where in the process priorities get cut to ensure focus, and what the organization will stop doing
- [ ] Include a mission/vision check only if you mean it (it adds time; so it's helpful to say either way)

IMPLEMENTATION — BUY THE YEAR AFTER THE VOTE

- [ ] Named owners and measurable results for each year-one priority
- [ ] Ask: “What will we look at monthly to know if the plan is working?” Require a tracking instrument
- [ ] Budget for post-adoption support: check-ins, coaching, or a progress review in year one

LONGEVITY — WRITE THE REFRESH IN NOW

- [ ] Specify an annual review and update protocol as a deliverable
- [ ] Ask bidders how the plan flexes when conditions change (scenarios, triggers, a living format)
- [ ] Decide who owns the plan after adoption. A person, not a binder

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Source: StratSimple analysis of 188 strategic planning RFPs. Benchmarks and the full methodology are available on request: info@stratsimple.com

ABOUT THIS BRIEF

About StratSimple

StratSimple helps nonprofits and associations build strategic plans that get used, combining broad stakeholder listening, pairing clients with tested expert facilitation partners, and shared progress tracking so the plan survives long after the board vote. This research brief is based on our analysis of 188 publicly issued strategic planning RFPs. Benchmarks and the full methodology are available on request: info@stratsimple.com

With thanks to Elisa Pratt, MA, CAE, CVF of Brewer Pratt Solutions for her practitioner review and contributions to the RFP library behind this research.

SOURCES

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188