

REQUEST FOR PROPOSALS: FREEDOM FUND STRATEGIC PLANNING PROCESS DESIGN & FACILITATION

September 2023

A. Summary

The Freedom Fund (FF) is seeking a consultant or team of consultants to co-design and facilitate our next strategic planning process.

The consultant(s) will work closely with FF's Senior Leadership Team (SLT), Wider Management Team (WMT), Senior Adviser to the CEO and a staff steering committee to plan, implement and document the stakeholder consultation process and provide an analysis of the outcomes of that process. They will also guide the Freedom Fund through the process of drafting the new strategy and accompanying documents.

We anticipate that this project will begin in late 2023 and culminate by late 2024 or early 2025.

1. Eligibility

Non-profit and for-profit consultants/consultancies are invited to submit proposals. Consultants must have significant expertise facilitating strategic planning processes and consulting with a diverse range of stakeholders, preferably for international non-profits, collaborative funds and/or foundations. Knowledge of human rights and human trafficking is also a plus.

2. Budget

Approximately USD 50,000 has been made available for this project, including the cost of consultants and any other costs related to the development of the strategic plan (such as other facilitation costs, design etc). Budgets will be reviewed with respect to the strength of the proposal in meeting the project objectives in a cost-effective manner.

3. Proposal deadline and process

Proposals should be submitted via email to Erin Phelps (ephelps@freedomfund.org) on or before 13 October 2023. Proposals should be no longer than 5 pages plus annexes. We hope to select the final candidate by the end of November 2023.

B. About the Freedom Fund

The Freedom Fund is a global fund with the goal of ending modern slavery. We identify and invest in the most effective frontline efforts to eradicate forced labour and human trafficking in the countries and sectors where they are most prevalent. Partnering with visionary investors, governments, anti-slavery organisations and those at risk of exploitation, we tackle the systems and power structures that allow modern slavery practices to thrive.

Our current strategic plan runs from 2020 to 2025. We have undergone a great deal of change and growth over this period. In February 2023, our Wider Management Team held a two-day meeting that involved a review of the strategic plan and a discussion of the strategic questions that a new plan might help us to consider. We acknowledged that while our current plan still reflects our core organisational priorities, we need a new plan that guides us toward ambitious targets for the future and better captures our theory of change. We also acknowledged the need to consult a wide range of stakeholders in the process, reflecting the diversity of our staff as well as our core commitment to centering the voices of frontline communities and survivors in our work.

The members of our Senior Leadership and Wider Management Teams have significant experience related to strategic planning and expect to be engaged throughout the process, especially during the strategy writing process. Therefore, we are looking for consultant(s) who are most actively involved during the design and consultation process, and who play a supportive guidance role during the drafting process.

Our board will also be consulted during the process and will ultimately be responsible for approving the plan.

C. Project overview and key objectives

We want to ensure that our next strategic plan provides us with a shared vision, leads to measurable goals that can effectively guide our ongoing and future work, fully embodies principles of diversity, equity and inclusion, and sets out a clear roadmap for our next five to six years.

This project will involve designing and executing a consultation process, analysing and synthesising key themes and drafting a strategic plan that reflects the priorities put forth through consultation. It may also involve additional pieces of research such as landscape scans and/or review of existing FF documents.

1. Stakeholder groups

The following table outlines the types of stakeholders we plan to involve in the process, along with methods of involvement/consultation for each group.

	Stakeholder type	Inputs
Internal	FF Senior Leadership & Wider Management Teams	Workshop(s) with consultants, drafting of strategy document
	FF staff	In-person session(s) at the FF Global Retreat; formation of representative staff steering committee; written survey; topical focus groups
	FF Board & Council of Advocates	Written survey and consultation session
External	FF grantee partners	Written survey; focus group discussions in each geography
	Hotspot community members, movement leaders, individuals with lived experience of modern slavery	Consultations with advisory group of community members representing Freedom Fund program areas, including survivors (more work is needed to determine composition and structure of this group)

2. Key issues & questions

We anticipate that discussions will be focused in the following areas:

- Defining FF’s role & theory of change
- Grassroots movement building, including survivor leadership
- Influence & systems change
- Scale, impact & measurement
- Funding & operations

D. Scope of consultancy

We seek an experienced and engaging consultant or group of consultants to co-design and facilitate the strategic planning process alongside FF staff. They should support us in taking a hard look at priorities and strategic direction while helping us ensure the consultation process is stimulating and meaningful for stakeholders.

We have dedicated staff who will participate in the planning process and assist with project management and various implementation tasks. We want to partner with consultant(s) who will help design and guide the process and play a lead facilitation role. Tasks will include, but not be limited to:

Planning

- Inform overall design of strategic planning process
- Co-create project plan, including specific considerations for consultation with each stakeholder group
- Participate in meetings with the staff steering committee and SLT as needed

Facilitation, information gathering & analysis

- Develop creative and appropriate methods for gathering and incorporating meaningful stakeholder input that ensure people feel heard and valued and account for power dynamics
- Develop surveys and other written materials
- Facilitate consultation sessions, focus groups and advisory group meetings
- Conduct research and/or environmental scans as needed
- Conduct interviews with key staff and stakeholders as needed
- Work with the staff steering committee to analyse the information and identify key takeaways and themes

Documentation

- Work with the staff steering committee and leadership team to determine best process to draft and revise strategic plan
- Support Senior Management Team in drafting initial strategy document for review and comment by stakeholders, revising and finalising for presentation to board

We expect that most of these activities, including facilitation of consultation sessions and focus groups, will take place virtually via Zoom. We may infrequently ask consultant(s) to travel to our London office for in-person meetings. We may also ask the consultant(s) to travel to facilitate consultation sessions at our all-staff Freedom Fund Global Retreat, scheduled to take place in Q2 2024 (location to be determined). Consultant travel costs for these events would be covered by the Freedom Fund.

E. Project deliverables & indicative timeline

Please note that exact timeline and deliverables may be adjusted pending approval from our board.

1. Deliverables

The strategic planning process should culminate in a strategy document, maximum 5 pages plus annexes. The document should include:

- Purpose, mission, vision and values (these will only be revised if we conclude through the process that the current set need to be updated)
- Objectives and key pathways to those objectives
- Theory of change, both narrative and graphical representations
- An annex, including a summary of the strategy process, list of stakeholders consulted and additional background information

The consultant(s) will also be expected to deliver the following as a part of the process:

- Initial project plan, including detailed consultant workplan
- Detailed report analysing key themes and takeaways from each stakeholder group

2. Indicative timeline

Stage 1: Planning

- Nov- December 2023: Contract with selected consultant(s), develop project plan and stakeholder mapping, launch community member/survivor advisory group
- January 2023: Project plan approved by Board at Q1 meeting

Stage 2: Consultation & analysis

- January - June 2024: Conduct both external and internal consultations, surveys & research (including funding landscape) and conduct analysis
- June 2024: Staff sessions at global retreat

Stage 3: Strategy writing

- July – September 2024: Reflection & drafting of strategy documents
- September – November 2024: Test & finalise
- Nov 2024 or Jan 2025: Final version of strategy presented to board for approval at board meeting
- Jan – March 2025: Launch new strategy (plan to be determined with communications team)

F. Proposal format, budget & evaluation criteria

1. Format

Interested parties should prepare a proposal of no more than 5 pages (excluding annexes). Proposals should contain the following sections:

- 1 Profile of consultancy/ consultant(s), including examples of past strategic planning work.
- 2 Approach to delivering on the scope of the RFP, philosophical approach to strategic planning and key strategic questions, including ideas, questions or limitations.
- 3 High-level workplan
- 4 Proposed budget in USD.

5 CVs of consultant(s), list of references and at least one relevant work sample (to be included in the annex).

The proposal must be written in English and submitted electronically in Microsoft Word or PDF format.

18 September 2023

Release of RFP

By 13 October 2023 11:59 pm Final proposals due.

EST

Please submit all documents to Erin Phelps (ephelps@freedomfund.org) with 'FF Strategic Planning RFP' as the email subject line

December 2022

Contract signed with selected organisation

2. Budget

FF has budgeted approximately \$50,000 USD for this consultancy as well as additional funds for logistical costs related to consultations, if required. Budgets will be reviewed with respect to the strength of the proposal in meeting the project objectives in a cost-effective manner. We do not simply prioritise the lowest budget.

As part of the proposal, please prepare a brief budget with the following breakdown:

- Personnel cost
- Other direct costs
- Overheads

Note to UK-based consultancies: Please note that the work in this project is being contracted by the Freedom Fund's US 501c3 entity; therefore, VAT is not applicable and should not be included in your budget.

3. Evaluation criteria

In evaluating proposals, FF will use the following criteria:

TECHNICAL CRITERIA	WEIGHTING
1. Capacity and track record:	30%
<ul style="list-style-type: none">• Demonstrated experience facilitating strategic planning processes• Demonstrated experience consulting with a diverse range of stakeholders	

TECHNICAL CRITERIA	WEIGHTING
<ul style="list-style-type: none"> • Demonstrated experience working with international non-profits, collaborative funds and/or foundations 	
<p>2. Approach and methodology:</p> <ul style="list-style-type: none"> • Understanding of, and responsiveness to, project objectives and key strategic questions • Relevance of suggested approach to achieving project objectives, including both content and structure 	30%
<p>3. Staffing levels (and team structure, if applying as a team) are adequate to deliver quality outputs within the desired timeframe</p>	20%
FINANCIAL CRITERIA	WEIGHTING
<p>4. Costs are proportional to project scale and reasonable for proposed activities</p>	20%