

## CRKN Strategic Planning Consultant – Request for Proposals

### Introduction

The Canadian Research Knowledge Network (CRKN) has begun the process of its next strategic plan (2019-2024). The last full strategic planning process occurred in 2012/2013 leading up to the 2013-2016 Strategic Plan, that was then extended for a further two years. As part of the 2013-2016 Strategic Plan, extensive stakeholder and member engagement occurred that directed CRKN's activities. Since that time, CRKN has continued to develop and expand its licensing capacity, tools, services, and collaborations, while the context in which CRKN and its Members operate has become increasingly complex.

In addition, in April 2018, CRKN merged with Canadiana.org to create a combined organization under the leadership of CRKN. This merger has expanded strategic opportunities and broadened our stakeholder community. As a vital element of the strategic planning process, we are looking to engage our member community and the stakeholder community, in part through focus groups and strategy sessions over the summer and fall of this year, culminating in a Board planning session in January 2019.

CRKN is looking to engage a Strategic Planning Consultant to lead our stakeholder consultation process. CRKN will work collaboratively with the selected Consultant, in both the planning, engagement, and analysis of the crucial stakeholder engagement phase, and will often look to the Consultant for input and feedback on the process and next steps.

One of the significant outcomes of this Strategic Plan will be an updated mission that encompasses the work of the combined organization.

### Scope of Work

- In collaboration with the CRKN team, contribute to a member and stakeholder survey to set strategic direction and priorities; compile and analyze survey results
- In collaboration with the CRKN team, host 4-6 online consultation sessions to generate engagement and feedback on top level priorities from the broader stakeholder community.
- Design one-on-one interview protocols with key stakeholders; hold 8 to 10 one-on-one interviews (either in-person or over the phone; approximately 30 minutes each)
- Prepare a list of top priorities, insights, and feedback from stakeholder consultations to be used in preparation for the facilitated strategic planning session at the CRKN AGM
- Plan and facilitate a 1.5-hour strategic planning session at the 2018 CRKN AGM in Vancouver, based on key strategic priorities identified in community consultations
- Plan and facilitate a full-day strategic planning session with the Board of Directors and CRKN staff
- Submit a formal consultation report that outlines process, findings, and outcomes of the consultations
- Review and give feedback as necessary on the strategic planning process and communications

## Timeline

- June 2018: Send out member and stakeholder surveys
- July-August 2018: Online and in-person group and one-on-one consultations
- September 2018: Draft consultation report of findings, insights, and priorities
- October 18, 2018: Facilitated session at the 2018 AGM (Vancouver, BC)
- January 2019: Facilitated full-day strategic planning session with CRKN Board of Directors (date and location to be determined)
- January 2019: Submit formal consultation report
- January 2019-March 2019: Feedback and review, as needed

## Selection Criteria

CRKN is looking to engage an experienced and innovative Strategic Planning Consultant with expertise in:

- Innovative and engaging strategic plan development in complex and changing environments
- Facilitated engagement sessions in French and English to support discussions and ensure conversations are productive and innovative
- Productive consultations with high-level stakeholders in French and English
- Compiling and consolidating findings and priorities from complex discussions on a variety of topics
- Drafting and contextualizing mission and vision statements
- Positioning of not-for-profit, member-driven organizations in a shifting environment

## Submitting Your Proposal

To be considered for this opportunity, please submit a proposal that includes:

- A cover letter with a brief description of the Consultant's work experience and expertise as it relates to the opportunity
- A summary of past strategic planning projects with links to the final strategic plan (when applicable)
- A list of three references from organizations for which the Consultant has provided strategic planning services
- A list of key personnel who will be involved in the project and brief descriptions of their experience and expertise (e.g., a colleague brought on to support either French or English activities)
- A work plan that includes a timeline, description of activities, and estimates of hours to be worked
- A schedule of costs

Please submit proposals, by email to Rebecca Ross at [rross@crkn.ca](mailto:rross@crkn.ca) by June 22, 2018, at 5 pm E.T.