

## Request for Proposals: Strategic Planning Consultant

**Issued by:** Lutheran Foundation of St. Louis

### Timeline:

- RFP Release Date: June 11, 2025
- Proposal Due Date: July 11, 2025
- Interviews with Finalists: week of July 28 (back up if needed – week of August 4, 2025)
- Consultant Selection Notification: No later than August 15, 2025
- Estimated Project Start Date: August 25, 2025 (Board of Directors' Retreat scheduled for September 26-27, 2025)
- Final Strategic Plan to be approved by Board: June 2026

### Introduction

The [Lutheran Foundation of St. Louis](#) is seeking a qualified and experienced strategic planning consultant to guide the organization through a comprehensive strategic planning process. This initiative aims to ensure that the Foundation continues to fulfill its mission effectively and remains responsive to the changing needs of our community. The final deliverable will be a strategic plan that aligns the Foundation's resources, initiatives, and goals with its long-term vision.

### About Lutheran Foundation of St. Louis

Lutheran Foundation of St. Louis manages the endowment established upon the sale of Lutheran Medical Center in 1984 and provides grant awards in [six primary funding focus areas](#): Christian Faith in Action, Congregation Community Engagement, Lutheran Schools & Organizations, Foreign-Born Populations, Justice Involved Individuals & Their Families, and Older Adults Maintaining Independence. The Foundation's vision is to see the Church brought into the hurting lives of people and people included in the healing life of the Church. Lutheran Foundation grants anywhere between \$4 – 5 million into the community each year and since its inception, has awarded more than \$145 million to St. Louis area churches, ministries, and nonprofit organizations.

### Planning Priorities

The Foundation's Board of Directors has launched a strategic planning process to guide its efforts over the next several years. Of keen interest to the Board is a robust process that:

- **Sets a tone** characterized by hope, innovation, and optimism;
- Explores and affirms the **unique identity** of Lutheran Foundation as a Christian, faith-based funder;
- Determines the **change and impact Lutheran Foundation is best positioned to affect** in the community;
- Identifies high impact **funding focus areas** for Lutheran Foundation that sit at the intersection of the community's deep hurts/needs and the foundation's resources, values, and identity;
- Broadens the imagination for how Lutheran Foundation **can behave as a funder** and then determines which options best serve the foundation and its respective funding focus areas;
- Helps the foundation **measure impact and collect stories** - of itself and its funding partners;
- Provides a framework to help the foundation focus and know **when to take risks**, and;

- Considers the scope and structure of [Send Me St. Louis](#), the capacity building arm and sister organization of Lutheran Foundation.

## Project Scope

The consultant will bring added capacity and leadership to facilitate the development of the next strategic plan for Lutheran Foundation of St. Louis which will be implemented beginning with the December 1, 2026 grant cycle. The strategic planning process will begin in Fall 2025 and conclude in Summer 2026. In Summer 2025, the consultant will work with staff and board leadership to plan the September 26-27, 2025, Board Retreat, to kick off strategic planning.

Based on ideas generated at this retreat, the consultant will:

1. **Facilitate Stakeholder Engagement** - Engage key stakeholders, including staff (6 people), board of directors (15 people), grantees (approximately 40-50), delegate congregations (83), and other community partners, to gather honest and authentic input and insights.
  - Conduct interviews, surveys, and/or focus groups.
  - Synthesize feedback into actionable insights.
2. **Environmental Scan** - Conduct an analysis and/or identify existing data sources of internal and external factors impacting the Foundation, including a review of current programs and operations.
3. **Assessment of trends in philanthropy**, both local and national, and insights on the best ways to support both young (early stage) and maturing nonprofits.
4. **Strategic Framework Development** - Guide the Foundation in defining or refining:
  - Mission, vision, and values.
  - Strategic priorities and objectives.
  - Measurable outcomes and key performance indicators (KPIs).
5. **Facilitate Strategic Planning Sessions** - Design and facilitate interactive planning sessions with staff and board to:
  - Develop consensus around strategic priorities.
  - Identify opportunities for growth, collaboration, and innovation.
6. **Deliver Final Strategic Plan** - Prepare a comprehensive, actionable strategic plan document that includes:
  - Summary of stakeholder input and findings.
  - Defined strategic goals and objectives.
  - Clear definition of where the board's work ends and where staff will continue.
  - Implementation plan with timelines, responsibilities, and resource requirements.
  - Metrics for evaluating progress and success.

## Proposal Requirements

Interested consultants or firms are invited to submit a proposal that includes the following:

1. **Cover Letter:** A brief introduction summarizing your qualifications and interest in the project.
2. **Consultant Profile:** Description of your background, comfort level working with Christian organizations and congregations, expertise, and relevant experience, including examples of similar projects with philanthropic foundations and faith-based organizations.

3. **Proposed Approach and Methodology:** Outline your approach to the strategic planning process, including ideas for the September 26-27, 2025, Board Retreat to kick-off strategic planning, stakeholder engagement, environmental scan, and plan development.
4. **Work Plan and Timeline:** Provide a detailed timeline and key milestones for the project.
5. **Budget and Fee Structure:** Include an itemized budget for your services, including estimates for all additional costs (e.g., travel, materials).
6. **References:** Contact information for at least three clients, preferably philanthropic foundations, for whom you have conducted similar work.

## Selection Criteria

Proposals will be evaluated based on the following criteria:

1. Demonstrated expertise in strategic planning, particularly with philanthropic foundations.
2. Experience working with faith-based organizations.
3. Knowledge of and experience with our local, St. Louis context.
4. Strength and feasibility of the proposed approach and methodology.
5. Experience facilitating inclusive and collaborative stakeholder engagement processes.
6. Alignment with the Foundation's mission and values.
7. Cost-effectiveness and clarity of the proposed budget.
8. Positive feedback from references.

## Submission Instructions

Proposals should be submitted electronically to [info@lutheranfoundation.org](mailto:info@lutheranfoundation.org), by **July 11, 2025**. Please direct any questions to Matt Miller, President/CEO - [matt@lutheranfoundation.org](mailto:matt@lutheranfoundation.org).

**Our preference is for your proposal to address all planning priorities and aspects of the project scope.** However, if you feel equipped to only address one component, we welcome your proposal for fulfilling that piece. Our desire for this process is to assemble the right partner(s) to help Lutheran Foundation embrace its next season of ministry.

## Terms and Conditions

Lutheran Foundation of St. Louis reserves the right to:

- Reject any or all proposals received.
- Request additional information or clarification from applicants.
- Negotiate terms and conditions with the selected consultant.

Thank you for your interest in partnering with the Lutheran Foundation of St. Louis to advance our mission through strategic planning. We look forward to reviewing your proposal.