



Request for Proposals (RFP): Strategic Planning Facilitation for the Midwest Energy Efficiency Alliance (MEEA)

Introduction

At MEEA, we leverage our expertise to be the Midwest's leading resource for our members, allies, policymakers and the broader sector to promote energy efficiency as the essential pathway to achieve a clean, affordable, equitable and sustainable future. We see energy efficiency as the least cost foundation of the clean energy economy, creating immediate energy savings, providing career pathways, reducing emissions, improving new and existing buildings and boosting Midwest business and industries. MEEA develops connections and engagement opportunities for a diverse group of stakeholders to collaboratively create practical solutions. MEEA serves as a technical resource and promotes program and policy best practices and highlights emerging technologies, all to maximize energy savings, reduce costs, improve resiliency and lower energy burden.

MEEA seeks proposals from qualified individuals or firms to facilitate a comprehensive strategic planning process. This initiative will culminate in a three-year strategic plan that will guide the organization in achieving its mission and goals in a dynamic industry. The selected bidder will work closely with a Board committee, gather insights from MEEA members, staff, and the full Board of Directors, and deliver a final plan within six months of project commencement. While MEEA envisions this process taking place over a six-month period, bidders may propose alternative more compressed timelines or approaches so long as they meet the goal of having a completed plan for Board approval on or around 10/1/2025.

Scope of Work

1. **Project Kickoff and Work Plan Development**
 - o Meet with MEEA leadership and the designated Board committee to confirm objectives, timeline, and deliverables.
 - o Develop a detailed work plan outlining key activities, milestones, and communication protocols.
2. **Stakeholder Engagement**
 - o Conduct interviews and/or surveys with MEEA members to gather insights on the organization's place within the EE industry, organizational strengths, areas for improvement, and future opportunities for growth covering topics such as:
 1. MEEA's competitive advantage and ways to expand industry presence
 2. MEEA's current areas of focus, strengths and weaknesses
 3. Industry gaps that MEEA might fill
 4. MEEA's membership offerings and opportunities for continued and increased engagement
 5. Areas where MEEA should expand its expertise to identify growth opportunities

- Facilitate discussions with a representative group of MEEA staff to identify the following:
 1. MEEA's current internal capabilities
 2. Resource needs for expanded work or additional areas of focus
 3. Additional partners that could support our work
 4. Their perception of the industry and what MEEA, and their work, offers competitively
- Design and lead one-day, in-person working session with the designated Board committee and other stakeholders which could include additional members of the Board of Directors and MEEA staff to align on vision, mission, and strategic focus areas.
- 3. **Draft Strategic Plan Development**
 - Collaborate with the Board committee to synthesize stakeholder input and draft a three-year strategic plan.
 - Include between three and five overarching goals, each with specific, measurable objectives.
 - Develop a framework that guides MEEA staff in creating annual operational plans to support strategic objectives.
- 4. **Feedback and Revision**
 - Present the draft strategic plan to the Board committee, MEEA staff, and the Board of Directors for review.
 - Gather detailed feedback through facilitated discussions and written input.
 - Revise the draft plan to incorporate feedback and ensure alignment with organizational priorities.
- 5. **Final Strategic Plan**
 - Deliver a polished, actionable three-year strategic plan with clearly defined goals, objectives, and implementation guidelines.
 - Present the final plan to the Board of Directors for approval tentatively by 10/1/25, including a summary of the process and key findings.

Timeline

- **RFP Issued:** 1/22/25
- **Proposals Due:** 2/19/25
- **Selection Notification:** 3/7/25
- **Project Start Date:** Tentatively 3/17/25
- **Final Plan Submission:** 10/1/25

Proposal Requirements

Proposals should not exceed 10 pages, excluding attachments, and must include:

1. **Cover Letter**
 - Overview of your qualifications, understanding of the project, and interest in partnering with MEEA.
2. **Approach and Methodology**
 - Describe in detail your approach to strategic planning, key elements included in the process and in the final plan, steps to achieve a final plan and any commitments not outlined here that would be needed from staff, Board members, or others.

- Describe your approach to stakeholder engagement, facilitation, and strategic plan development.
 - Outline the key steps and deliverables for the project, including specific engagement techniques and tools.
 - Describe how MEEA staff and the Board strategic planning committee will be engaged throughout the process including level of effort expected by each.
 - Other related information that does not fall into the above categories.
3. **Team Qualifications**
- Resumes and bios of key staff who will specifically work on the project only, highlighting relevant experience and expertise.
 - Organizational profile or portfolio showcasing similar projects.
4. **References**
- Provide three references from organizations for which you have conducted similar work, including contact information and a brief description of the projects.
5. **Cost Proposal**
- Hourly rate estimates by key task.
 - Total not-to-exceed amount for the project.
 - Any additional anticipated expenses, such as travel or materials.
6. **Timeline**
- Proposed timeline for completing the project within the six-month period or in any proposed abbreviated period, with key milestones and deliverables clearly identified.

Evaluation Criteria

Proposals will be evaluated based on:

1. Demonstrated experience in strategic planning facilitation for nonprofit organizations.
3. Quality and clarity of the proposed approach and methodology.
4. Qualifications and expertise of the proposed team.
5. Cost effectiveness and alignment with the project scope.
6. Understanding of MEEA's mission, programs, and the Midwest energy efficiency landscape.
7. Interview or discussion with staff working on project.
6. Feedback from references.

Submission Instructions

Proposals must be submitted electronically as a single PDF document to meeaboard@mwalliance.org by 5pm CST on 2/19/25. Late submissions will not be considered. For questions or further information contact meeaboard@mwalliance.org.

About MEEA

The Midwest Energy Efficiency Alliance (MEEA) is a collaborative network, promoting energy efficiency to optimize energy generation, reduce consumption, create jobs and decrease carbon emissions in all Midwest communities. For more information, please visit our website at www.mwalliance.org.