

RFP FOR STRATEGIC PLANNING CONSULTANT

INTRODUCTION

The Canal Dock Boathouse, Inc. (CDBI) is requesting proposals from qualified strategic planning consultants to conduct a far-reaching and inclusive input process to inform a Strategic Plan (business goal based versus time horizon) and guide the non-profit organization's work towards its key objectives.

The selected consultant will be responsible for assisting the CDBI Board and Executive Director with the full scope of developing a Strategic Plan. CDBI is soliciting proposals for these services in accordance with the terms, conditions and instructions set forth in this Request for Proposal.

There is no expressed or implied obligation for CDBI to reimburse responding firms for any expenses incurred in preparing proposals in response to the request or for attending any meetings or conferences related to preparing or presenting proposals.

BACKGROUND

CDBI excels at learn to row afterschool program development for New Haven public and magnet high school students, dry land rowing and yoga open to all community members, boathouse memberships, and hosting periodic Community days to introduce the community to New Haven Harbor and the organization's paddling programs. The annual Dragon Boat Regatta engages local businesses to compete. A member based sailing program began this past summer season (2023).

Our roots trace back more than two decades when New Haven's Mayor advocated to the state for funds to build a community boathouse since the Federal/state transportation project claimed the property of a former boathouse and public access to the waterways through Eminent domain.

Since 2014, CDBI operated without a physical structure and offered afterschool indoor rowing at some public high schools after school and offered on the water summer camps on a small scale. All of this started through a grant from Newman's Own Foundation and volunteer time.

CDBI moved into the new Boathouse in December 2018. Originally annual revenue for the organization was to come from three sources: event space rentals, tenant rental, and

program fees. An event planner was the organization's first hire (in October 2018) then an executive director was hired in January 2020. A program manager/coach was hired in March 2020. Due to Covid, the Event planner and Program manager/Coach were let go in June 2020.

In 2020, Canal Dock ceased being the operators of the physical Boathouse and it was given back to the City of New Haven to operate and market for rentals and events.

Fast forward to February 2024 and we have a full-time Executive Director (no change), part-time program coach, part-time tutor and a full-time grant writer. Canal Dock is a tenant in the Boathouse with the City as the building operator.

CDBI has learned key things that in its early stages:

- The location is ideal for sailing programs in the afternoon
- Waters are best for rowing in the morning or up until noon
- The building is overwhelmingly expensive to run
- A larger administration is required to run the growing organization
- Fundraising is a challenge with so many non-profits in New Haven and a lack of newly refined strategic goals and objectives. We need to develop diverse and sustainable sources for revenue
- Our name and the physical building name may not be an advantage, as we are assumed to operate the building
- Boathouse is often associated with Yale, even though Yale does not fund it

CDBI's mission is to:

OPEN NEW HAVEN'S WATERFRONT TO THE COMMUNITY

CDBI currently achieves this through its membership offering, yoga offered on the platform, dry land rowing on the platform and a minimum of 5 community boating days each summer.

CDBI is committed to being an equitable and inclusive organization and strives to incorporate equity throughout all of our programs and outcomes. Equity will be incorporated as a core value of our new strategic plan, with diversity and inclusion as critical strategies towards what we do and how we operate. In addition, CDBI is committed to dismantling systemic racism and culture divisions that undermines these goals.

PROPOSAL

The following information is required for the proposal submission to be considered:

- Firm name, address, contact name, title, phone number & email address
- Scope of Work including an outlined approach and strategy to complete the requested Scope of Work including time commitment (online, in person and via questionnaire) required of Board
- Cost estimate for the proposed Scope of Work, and any other project-related costs
- List of 3 references, examples of similar projects and CVs for any staff assigned to this project

ELIGIBILITY

Consultants should be experienced in working with organizations in the development of a responsive and a long-term strategic plan. In addition, experience working with youth programs and/or non-profits is a bonus. The intent of the Request for Proposal is to garner proposals from qualified strategic planning consultants to work in partnership with the Strategic Planning Committee, the CDBI Board, the CDBI staff and community stakeholders. The successful proposer will work directly with the Strategic Planning Committee and the Executive Director to ensure all activities in this project are completed.

SCOPE OF WORK REQUESTED

- Conduct a pre-meeting with CDBI Strategic Planning Committee, CDBI Board and Executive Director to clarify expectations and desired outcomes
- Review relevant documents identified by the Board and Executive Director including current Strategic Plan
- Organize and facilitate meetings with all stakeholder groups to encourage participation and gather insight regarding critical issues and priorities for CDBI. Where possible solicit Board input by email or via Zoom
- Work with the Strategic Planning Committee to ensure that there is thorough board, staff and community engagement (including the City of New Haven*)
- Provide Strategic Planning Committee with documentation of findings from the public and staff meetings, and preliminary direction for a Strategic Plan.
- Provide a draft Strategic Plan to staff for feasibility review.
- Provide a draft Strategic Plan at a Board meeting by no later than May 3, 2024.
- Attend and present the final report at a CDBI Board meeting (May 20, 2024).

*The City of New Haven wants to see activity at Boathouse and charges nominal rent to us and gives a stipend to us for specific numbers of community activities.

PROJECT SCHEDULE

Proposals must be received no later than 5:00 p.m. EST on March 4, 2024. Proposals received later than the date and time specified will not be considered unless previously

arranged. CDBI assumes no responsibility or liability for late delivery or receipt of responses. In order to be considered eligible for the project, the consultant who would be assigned to the project, must be available in person or by phone/videoconference to respond to questions the week of March 4, 2024. The project will be awarded, and terms finalized on that week or thereafter. Selection of a consultant under this Request for Proposal does not commit CDBI to procuring any services pursuant to this Request for Proposal. CDBI will negotiate contract terms upon selection.

BUDGET

Up to \$10,000 for consulting services

Questions may be directed to:

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CDBI Board Member

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