**Request for Proposal (RFP) for Strategic Planning Consultant**

**Project Title:** Strategic Planning Consultant Services

**RFP Issued By:**  
MILWAUKEE HEALTH SERVICES, INC.  
2555 N MLK JR DRIVE  
MILWAUKEE, WI 53212  
414 372-8080  
sdavis@mhsi.org  
WWW.MHSI.ORG

**Date Issued:** May 20, 2025  
**Proposal Submission Deadline:** June 13, 2025  
**Proposal Submission Email:** lsether@mhsi.org

**1. Background and Introduction**

Milwaukee Health Services, Inc. is an independent, not for profit Federally Qualified Health Center with a mission to provide accessible, quality primary and related health care services to Milwaukee residents, with our continuing emphasis on medically underserved families and individuals. MHSI, since 1989, continues providing medical, dental, podiatry, and behavioral healthcare, in addition to a limited number of specialty services.

As part of our ongoing growth and success, we seek to partner with a qualified Strategic Planning Consultant to help us develop a comprehensive strategic plan that will guide our organizational goals and initiatives for the next 3-5 years.

**2. Project Objectives**

The purpose of this RFP is to solicit proposals from experienced and qualified Strategic Planning Consultants who will assist us in creating a strategic plan that:

* Focuses on health equity, MHSI’s Four Pillars of Growth, and financial stability.
* Aligns with our organizational mission, vision, and values
* Identifies key strategic objectives and priorities for the next [insert number] years
* Ensures stakeholder engagement and buy-in
* Provides measurable outcomes and performance metrics
* Supports decision-making processes and resource allocation
* Adapts to changing environments and challenges

**3. Scope of Work**

The selected consultant will be expected to:

1. **Assessment and Data Collection**:
   * Conduct a thorough review of our current organizational structure, processes, strengths, weaknesses, opportunities, and challenges.
   * Perform interviews, surveys, or focus groups with internal stakeholders, leadership, and community stakeholders and patients.
   * Review relevant data, reports, and documents to understand past performance and future needs.
2. **Facilitating Strategic Planning Workshops**:
   * Organize and lead strategic planning workshops with senior leadership and key stakeholders.
   * Guide discussions around vision, mission, values, goals, and strategy development.
3. **Strategy Development**:
   * Assist in identifying strategic goals and objectives.
   * Develop clear and actionable strategic initiatives and milestones.
   * Ensure the alignment of these initiatives with the overall organizational vision and goals.
4. **Implementation and Action Plans**:
   * Provide a framework for implementation and operationalization of the strategic plan.
   * Develop timelines, accountability structures, and resource requirements for key initiatives.
5. **Evaluation and Monitoring**:
   * Help establish metrics for monitoring and evaluating the success of the strategic plan.
   * Provide recommendations on regular review and update processes.

**4. Proposal Requirements**

Proposals must include the following:

1. **Consultant Overview**:
   * Name of the consultant or firm, contact information, and brief company profile.
   * Relevant experience and qualifications, including past work with similar organizations.
   * Key team members who will be involved, their roles, and relevant expertise.
2. **Approach and Methodology**:
   * Description of the approach and methodology you will use to complete the project, including timelines and milestones.
   * Examples of tools, frameworks, and techniques you plan to use for strategic planning, data collection, and analysis.
3. **Deliverables**:
   * A detailed list of deliverables, including reports, workshops, presentations, and action plans.
   * Description of how the final strategic plan will be presented and delivered.
4. **References**:
   * At least two references from previous clients for whom you have performed similar work.
5. **Cost Proposal**:
   * A detailed breakdown of your pricing structure, including hourly rates, estimated time commitment, and any additional costs.
   * Total cost for completing the project.
6. **Timeline**:
   * Estimated timeline for completion, including key milestones and deadlines.

**5. Evaluation Criteria**

Proposals will be evaluated based on the following criteria:

* Relevant experience and qualifications of the consultant
* Approach and methodology for strategic planning
* Alignment of the proposed approach with the organization’s needs
* Past success in working with similar organizations
* Cost-effectiveness
* References and client feedback
* Ability to meet deadlines and milestones

**6. Terms and Conditions**

* MILWAUKEE HEALTH SERVICES, INC. reserves the right to reject any or all proposals.
* The consultant selected will be required to sign a formal contract outlining the terms, conditions, and deliverables for the project.
* The consultant must maintain confidentiality regarding any sensitive or proprietary information shared during the engagement.
* All proposals must be submitted by June 13, 2025.

**7. Submission Instructions**

All proposals must be submitted electronically in PDF format to **lsether@mhsi.org** the deadline of June 13, 2025. Late submissions will not be considered.

The proposals will be reviewed by June 30, 2025.

Proposers will be notified by July 11, 2025

For any questions regarding the RFP or the proposal process, please contact Laurie Sether, lsether@mhsi.org.

**Thank you for your interest in partnering with MILWAUKEE HEALTH SERVICES, INC. We look forward to receiving your proposal.**

Top of Form