



Strategic Plan RFP: Responses to Questions (1/10/25)

1. Do you have a sense of the level of capacity that advisory group members will have during the strategic planning process? Will they have time dedicated to engaging in this work (e.g., % of workload or estimated hours)? We understand this will be dependent on the role, structure, and cadence of the cross-departmental advisory group; however, if you have a loose sense of that now, we could propose something mindful of their capacity.

This will be dependent on the structure and cadence of the advisory group. We have estimated a minimum of 2.5% of a staff person's time to be spent on the strategic planning process in 2025, with the expectation that percentage will be higher if on the advisory group or in management, and lower for others.

2. When is the CNT Staff Retreat scheduled to take place? We would like to build this date into our budget proposal and deliverable timeline.

Fall 2025, the exact date is still to be determined.

3. Along with the work products developed by the 2024 strategic consultant, will the consultant chosen for this RFP be able to be introduced to or meet with the previous strategic consultant from 2024, if helpful? What was the duration of the 2024 consultant's work? How many meetings or workshops did they hold as part of their scope of work?

Staff with CNT's 2024 consultant, Encolor, would be happy to meet with the selected consultant. Encolor's contract with CNT was initiated in June 2024 and concluded in December 2024, but Encolor still provides ongoing support to CNT as needed.

Encolor hosted one primary workshop with key staff and leadership and attended biweekly and weekly meetings to provide updates on their research to CNT's CEO and Chief Strategy Officer. Encolor conducted a total of 12 interviews with CNT staff, Board of Directors, and CNT partners and clients.

4. How many strategic planning workshops and meetings is CNT anticipating? CNT is not committed to a specific number of workshops and meetings, please include your recommendation in your proposal.

5. How many advisory committee meetings or workshops is the advisory committee anticipating?

CNT is not committed to a specific number of workshops and meetings, please include your recommendation in your proposal.

6. Will theory of change, impact statement, and strategic plan all be coordinated across the advisory group, overall staff, and board of directors? Will the development of certain deliverables be more segmented across stakeholder groups? For example, the strategic plan may be more focused to the Board of Directors and select staff, whereas the advisory committee provides deeper feedback on the theory of change and impact statement.

We anticipate that the advisory group, staff and board will all be involved in contributing to the theory of change, impact statement and strategic plan, with the advisory board overall spending more time on the process.

7. Is CNT open to having their past CBO partners, community members, or neighborhood leaders take part in the advisory group? If so, would CNT be able to provide that information to the hired consultant upon awarding the contract? If not, we would also like to consider including them as interviewees to get an external perspective of CNT.

CNT is open to and encourages partners to be involved in the process as interviewees but not as members of the advisory group. CNT can provide contact information for prospective interviewees.

8. Does CNT have more information on staff satisfaction that could be shared?

CNT conducted several surveys in the past with the most recent taking place in 2024; the anonymized summary data of all available results can be shared with the selected consultant.

9. Why is CNT re-evaluating its purpose at this time? What specific challenges or opportunities prompted this reassessment?

Several years ago, CNT evaluated and recommitted to the organizational mission and vision statements. More recently, CNT has experienced a change in leadership and has embarked on a process to develop core values and complete a comprehensive organizational assessment. Without a current strategic plan or consensus on strategic priorities, CNT aims to build on this foundation through this strategic planning process. Additionally, CNT aims to make routine strategic reassessments a standard organizational process, ensuring actionable steps to better fulfill our mission until our services are no longer needed.

10. Do you envision 50th anniversary celebrations or milestones being integrated into the Strategic Planning process or outcomes?

The anniversary milestone may be a natural point that allows for reflection on the history and future of the organization. We are open to how these may integrate and how the anniversary may align with our strategic goals.

11. Is the work done by the previous strategic consultant (e.g., value statements, workbook findings, and additional reports) fully completed? If not, when will these be finalized?

There are several completed or in-progress documents from previous consultants, including overview PowerPoints, interview summaries, notes, updated organizational documents, etc. A comprehensive list will be provided to the hired consultant team.

12. What specific insights or findings from the previous strategic consultant are expected to directly inform the Theory of Change and Strategic Plan?

The values assessment work has led to organizational values which shall guide how we approach our work internally and externally and are to be used to guide the strategic plan. The organizational assessment provides foundational data and a landscape analysis to help identify the current state of CNT.

13. Neighborhood engagement in the needs assessment process was mentioned in the RFP. How was this information obtained? (community forums, qualitative or quantitative methodologies, other?)

Qualitative methods were used to obtain information from partners, clients and community-based organizations in the organizational assessment.

14. Would we have the opportunity to review previous community analysis information and contact select community members who were involved?

Yes, after a contract is executed.

15. Throughout your areas of expertise, are your conversations, strategies and policies translating into boots-on-the-ground programming and change that can be measured?

CNT's program work may be broad, deep and/or varied, and measurable impact is not consistent across different projects and program areas. Our work may lead to a new data tool or research report, or may lead to a community-based partner gaining new community planning skills, for example. Developing a theory of change and standard measures of success and impact are crucial aspects of this strategic planning process.

16. Are staff and board members already prepared and committed to actively participating in the Strategic Planning process? If not, what measures are being taken to ensure their readiness and engagement?

The staff and Board have been engaged throughout the past year in the values and organizational assessment. CNT is budgeting time for all staff to engage in the strategic planning process in 2025.

17. How does CNT intend to manage differing levels of engagement or resistance among stakeholders?

CNT is looking to engage with a consultant that has experience and expertise in creating opportunities for stakeholders to share their perspectives, listen to one another and build consensus. CNT intends to create an advisory group for a deeper level of participation.

18. Does CNT have specific individuals, organizations, community representation in mind for the advisory group? If not, what criteria should guide the selection process?

CNT would like the advisory group to be made up of current employees but is receptive to recommendations from the consultant.

19. Will there be any required representation from external organizations, community members, or funders in the advisory group?

CNT hopes to involve external entities during the strategic planning process although not as part of the advisory group.

20. How do you see the goal to refine a shared understanding of CNT's identity and mission complementing the insights gained from the 360-degree evaluation? Are there gaps in that evaluation that this process needs to address?

The insights gained from the evaluation provide a starting point for naming the current state of the organization and show a shared commitment to the mission. This process will address the gap between the various visions for CNT's future by refining the understanding of who CNT is and the impact we want to have and create the strategic path to get there.

21. The RFP mentions facilitating an all-staff strategic planning retreat twice. Are these the same meeting? Will the Board of Directors participate in the retreat? What do you see as the board's role in strategic planning?

Yes, these are the same – CNT intends for one all-staff in-person retreat in the fall of 2025. No, the Board will not participate in the retreat. The Board will be a key stakeholder along with staff in contributing to the strategic plan.

22. If the Board will not be participating in the staff planning retreat, will there be a separate retreat for the Board?

Yes.

23. What's "on the table" in this new planning effort? Is it fair to say CNT's current Societal Vision and Mission still resonate, and that it's the way the mission will be actualized that's up for reaffirmation and consideration, given how the Chicago community's needs have evolved, who else is working in partnership with CNT (and in what ways), and the organization's current opportunities?

CNT is committed to its mission and vision statements. Yes, that is accurate. Developing and refining CNT's 'why' and 'how' are on the table.

24. Does CNT have a current Strategic Plan or Theory of Change that's guiding its strategic direction? From the initial synthesis of recent assessments and data collection, are there certain strategic questions rising to the surface that CNT will want to tackle in this upcoming planning effort? Are there stakeholders who would like to see CNT grow/shrink/pivot in any particular ways?

CNT does not have a current strategic plan or theory of change. CNT is generally focused on systems change work in the built environment and is committed to its mission. One particular focus for this effort is on impact, and to develop clear, shared language around intended impact and how we achieve that impact. There are additional secondary questions around programs and initiatives, financial sustainability, and organizational structure. Information from various stakeholders that comprise the organizational assessment will be shared after the contract is executed.

25. In what ways would you say your new values statements diverge from what you'd agreed on previously?

CNT did not previously have a values statement.

26. How does CNT embrace its values and commitment to justice in its current decision-making processes and practices, as well as its day-to-day activities?

The majority of our staff are people of color, a deliberate and natural progression that mirrors our commitment to Justice, Equity, Diversity, and Inclusion (JEDI) principles. Our leaders also reflect this diversity, ensuring that leadership perspectives are inclusive and representative of the communities we serve. Our board, composed of majority people of color, includes topical experts, civic leaders, entrepreneurs and CBOs leaders. This structure ensures a continuous, direct connection to the grassroots efforts that drive our mission.

Additionally, we have adopted principles for engagement with community groups based on the Jemez Principles, a foundational document in environmental justice. This approach amplifies the impact of our programs and reinforces our role as a catalyst for sustainable, equitable community development.

27. What activities did CNT undertake, specifically, in assessing the history of CNT's advocacy, projects, and progress, as well as the 360 degree stakeholder data collection? Are you able to offer any high-level "ah-hahs" of what these recent evaluation efforts yielded? How much additional data, if any, do you anticipate the selected consultant will need to gather to successfully accomplish this project?

CNT contracted with a consultant who interviewed various stakeholders to develop a current conditions assessment and to develop this RFP. The data provides a foundation to start the strategic planning process and indicates the variety of perspectives on CNT currently and its future.

28. Can you say a bit more about the level of specificity you envision in this project's resulting "Impact Statement" deliverable? How detailed would this need to be to establish measurable anticipated outcomes for each Strategic Plan "Impact Goal" CNT will hold itself accountable for?

CNT intends to have an impact statement that addresses our why, our actions and the impact of our work. The impact statement will need to create a framework for establishing performance measures and outcomes.

29. It appears CNT greatly increased its contributed revenue in 2023. What accounted for that spike in revenue, and how was it used? Did programming of a particular sort expand? Do you anticipate additional expansion, and if so, in what areas?

The increase in revenue is attributed to government-funded passthrough. CNT has several ARPA-funded contracts, the majority of which are passthrough funds to other entities. We do not anticipate an expansion of federal passthrough funding.

30. How often does CNT hold regularly scheduled all-staff meetings? What other communications vehicles exist through which organizational messaging takes place? How often does the CNT Board meet (quarterly?) and how long do typical Board meetings last? Are regularly scheduled staff/board meetings virtual/hybrid/or in-person?

Ninety-minute all-staff meetings are held monthly and are hybrid. One-hour senior management meetings happen biweekly and are virtual. Three-hour Board meetings happen quarterly and are virtual. Organizational policy updates are shared via email and informal communication vehicles exist such as the CEO's office hours. This is not an exhaustive list; additional information on recurring or standing meetings can be provided to the consultant who is awarded the contract.

31. What role do you anticipate the Board (as the Board) having in this process? Is there specific authority or a mandate that we would need to secure in advance of convening the advisory group and launching the planning process?

The Board is a key stakeholder in this process, along with staff. CNT staff leadership will be consulted prior to convening the advisory group and launching the planning process.

32. How regularly does the Board meet? Can you share its 2025 schedule to enable alignment with a proposed project plan?

The Board meets quarterly. Meetings are currently scheduled for February, May, September and December.

33. In addition to the background shared in the RFP, are there any other internal or external factors driving the need for the strategic plan at this time?

CNT does not have a current strategic plan or theory of change. We are looking to ensure that we have internal alignment on our organizational vision and strategic pathway. CNT's program work may be broad, deep and/or varied, and measurable impact is not consistent across different projects and program areas. One particular focus for this effort is on impact, and to develop clear, shared language around intended impact and how we achieve that impact. Our leadership is focused on operationalizing consistent reflection and refinement of the organization moving forward.

34. To what extent is the board supportive of this work? How aligned are the board and staff on the need to do this work?

The Board is supportive of this work and in a thoughtful, intentional strategic planning process. Board and staff have had limited engagement on organizational strategy together.

35. To what extent is CNT experiencing fatigue as a result of recent changes? Do you anticipate resistance to change or to engaging in this work?

Organizational change and transformation can be challenging. We anticipate that greater clarity and alignment will be positive for the organization, and that a strategic plan will provide a shared framework and common language.

36. Can you share more about the rationale for hiring a different consultant to develop the theory of change, impact statement, and strategic plan than the one CNT hired to conduct the research?

The consulting engagement to conduct organizational research helped clarify the scope and approach for our strategic plan acting as an extension of the executive leadership team. We viewed these as two distinct activities to ensure that CNT would not preempt the strategic planning process.

a. Is the research consultant bidding on this phase of the project?

No.

37. The RFP mentions related research already underway or completed (i.e., the values assessment; the evaluation of the history of advocacy, projects, and programs; Board, partners, clients, CBO research to paint a 360 view of the organization):

- a. Will this research be completed before the strategic planning process launches in March? If not, when will it be completed?

Yes.

- b. What sort of questions did CNT use to inform the staff/board/clients/CBO research? What sort of information did this research generate?

The information will be shared after a contract is executed.

- c. To what extent were the board and staff engaged in the research /data collection process?

Several staff and Board members were interviewed. The Senior Management team had a direct hand in driving the content and refining the document to meet the needs of the organization.

- d. Will the strategic planning consultant have access to the questions that were asked and the methodology used in the existing research projects?

Yes.

- e. What will be included in the evaluation of history advocacy and projects? Will this evaluation include impact and effectiveness?

This includes historical documentation, a review of advocacy sign-on letters from 2024, and current program documentation. Impact and effectiveness are not included.

38. What is encompassed in your strategic planning goal to “evaluate and refine CNTs programs, growth opportunities, and financial sustainability”?

The strategic plan shall guide CNT’s future programs and projects with a framework for how we fund our work. CNT currently has philanthropic funding as well as fee-for-service contracts.

- a. How is this different than the evaluation of the history of programs/advocacy and projects already completed?

The history and informational documents only provide a baseline of historical and current work. Using a shared theory of change and language will support the evaluation and refinement of our programs, growth opportunities and financial sustainability.

39. In addition to staff and board, are there other groups you would like to engage in the development of the theory of change, impact statement, and/ or strategic plan?

Yes, we would like to engage external partners and stakeholders.

- a. Do any of the groups included in the research need to be integrated into the development of the theory of change, impact statement, and/or strategic plan?

External entities who were interviewed may be involved in this process as part of external stakeholder engagement to provide feedback on the strategic plan, theory of change, and impact statement.

40. The RFP mentions the desire to derive the theory of change from the Staff retreat. How deeply does the board expect to be involved in the development of the theory of change?

The Theory of Change is not explicitly listed as an outcome of the staff retreat. Board and staff are both to be involved in the strategic planning process.

41. What are your expectations for the role of the advisory group? How will these people be selected?

CNT would like the advisory group to be made up of current employees but is receptive to recommendations from the consultant. Please provide your approach to an advisory group for this engagement.

42. What will the approval process be for the theory of change, impact statement, and strategic plan? Who needs to be involved in what sequence?

CNT leadership will approve the final deliverables.

43. Do you have a preference or expectation as to the sequence of the three deliverables?

No, please include your recommended timeline in your proposal.

44. Are you open to considering approaches that differ from what you specifically outlined in the RFP?

CNT is open to recommendations or approaches beyond the scope, assuming the deliverables and general scope are maintained.

45. How much flexibility do we have in the timeline proposed in the RFP (March - December 2025 with the goal of having a draft plan by October)?

CNT intends for the deliverables to be finalized and adopted in 2025, and for drafts to be shareable at the fall all-staff retreat.

46. Are there any additional milestone dates, or internal timing markers that we need to be aware of incorporating into our process?

No.

47. Given your preference for understanding Chicagoland, do teams outside the area have a realistic chance of obtaining the contract? Would having a team member in Chicago when the rest of the team is out of the area help address concerns?

Chicago presence is not a requirement; however, our ideal consultant would have a depth of understanding of the local context in which CNT operates and be able to facilitate some in-person meetings.

48. Does CNT have previously developed Theory of Change and Impact Statement documents? I would like to know what is working for you.

CNT does not have a current theory of change or impact statement.

49. You request hybrid planning sessions. How many people would be remote participants? Would you consider replacing some hybrid events with entirely virtual and asynchronous sessions? Virtual only tends to be more cost-effective and generate similar, if not better, results than hybrid.

CNT has several remote staff and Board members. We are open to recommendations that will address the scope and ensure inclusive, deliberate engagement from stakeholders.

50. What accommodations should we anticipate needing for participants with disabilities? Do you already have resources and technologies that work well for your organization? I am thinking in particular about remote participants.

CNT is committed to promoting an inclusive workplace and works to assess and implement appropriate accommodations, as requested. CNT uses virtual meeting tools regularly.

51. Do you have tools or formats you have used for strategic or annual planning that emphasize your social and environmental justice priorities, and can you share them?

We have previously used a rubric for project selection that can be shared with the consultant hired.

52. How important is it to have a consultant team member based in Chicagoland for this proposed work? Would a local advisor to inform of the context be sufficient even if the lead facilitator isn't locally based?

Our ideal consultant would have a depth of understanding of the local context in which CNT operates and be able to facilitate some in-person meetings.

53. How much of CNT's work is local to Chicagoland, Illinois and Midwest versus national?

The majority of CNT's current work, approximately 90%, is based in the Midwest and 10% is national.

54. Given external interviews already will have happened, does CNT envision the consultant doing additional interviews or focus groups with external stakeholders in addition to creating the advisory board?

The advisory board will be comprised of internal stakeholders. Additional interviews or focus groups of external stakeholders may be conducted during the strategic planning process.

55. How many meetings would CNT ideally desire take place in person in Chicago in addition to the one-day retreat?

We are open to recommendations on meeting cadence and location. Note several CNT staff and Board members are remote, while the majority are Chicago based.

56. Does CNT desire a theory of change that is solely for its own activities or is there also a desire to have a process to develop a shared theory of change across partners - to help inform CNT's own theory of change?

CNT hopes to involve external stakeholders and partners in this process and develop its own organizational theory of change.

57. The scope of work as described in the RFP is almost entirely internally-facing, with engagement of staff and board and assessment of CNT programs, finances, systems, and impact, plus a report to funders at the end. Are we reading correctly that you're not seeking additional engagement of CNT external stakeholders (funders, partners, clients, etc.), analysis of best practices in the field, assessment of opportunities, or any other external scans?

CNT intends to include additional engagement of external stakeholders and welcomes proposals that include external facing assessments or analyses.

58. Might it be possible to see a copy of CNT's current strategic plan and/or most recent annual report?

CNT's most recent annual report is available here: <https://cnt.org/annual-report/2023/>

59. Can CNT expand on what they envision when they note "co-creation" as the process for the development of the strategic deliverables? Are there specific ways different internal stakeholders desire to be engaged, or is that up to the consultant team to propose?

CNT intends for participation from all staff, the Board as well as an advisory board. We welcome recommendations in proposals on the approach and process.

60. Does CNT anticipate its deliverables coming out of this scope of work to be for internal use, or for public consumption?

CNT anticipates the deliverables as mainly internal facing, whereas communications language and a slide deck are to be for external audiences.

61. What strategic communication outcomes is CNT looking for with the development of a theory of change and an impact statement? Can this be part of the strategic plan or do they need to be stand alone deliverables?

These may be packaged together. Per question 10 and 11 of the proposal section, please include information regarding what you will produce, the formats of the deliverables and samples of your work.

62. How much of this scope of work is geared toward developing CNT's external strategies versus internal change management?

The strategic planning process is part of organizational transformation and change, with the end products being guiding documents and frameworks on how and why CNT does its work, the strategic plan guiding the work, and the impact statement to evaluate the work.

63. What does CNT hope to see from an implementation perspective from this scope of work?

CNT intends for the creation of a 5-year strategic plan with an accompanying implementation roadmap that includes it as a key document in developing the organizational 2026 workplan and metrics of success.

64. Does the organization currently have a theory of change document? If so, when was it last updated? May we review it?

CNT does not currently have a theory of change document.

65. Are there critical, overarching operational or programmatic opportunities or challenges that this strategic planning process must address?

This is CNT's first strategic plan in recent history. CNT is continuing to prioritize systems change work in the built environment through our 'think and do' model as well as investments in maintaining institutional knowledge and measuring our impact. The strategic plan must lead to a refined, shared understanding of what is core to CNT, its program and overall structure. Additional information such as the organizational assessment and SWOT analyses will be shared after contract execution.

66. Are there any other concurrent or recently completed planning processes or assessments that need to be taken into consideration?

Yes. They will be made available to the consultant that is hired.

67. The RFP notes a need for a Consultant Team that can manage disparate opinions well. What specific areas of the planning process are especially disparate perspectives likely to arise?

Diverse opinions and perspectives are encouraged and to be expected. We do not anticipate that there is consensus on a vision for CNT; this process will refine the shared understanding of who CNT is and the impact we want to have and create the strategic path to get there.

68. The RFP specifically notes internal stakeholders (board and staff) in key engagement roles (such as the Advisory Committee). Is there an openness to including external stakeholders such as beneficiaries and partners in more core planning roles (such as the Advisory Committee) as well?

We anticipate that the advisory group, staff and board will all be involved in contributing to the theory of change, impact statement and strategic plan, with the advisory board overall spending more time on the process. CNT is open to and encourages partners to be involved in the process as interviewees but not as members of the advisory group. CNT can provide contact information for prospective interviewees.

69. Is CNT interested in receiving proposals that include actions or initiatives beyond the scope of work as it is written in the RFP?

CNT is open to recommendations that include additional actions or initiatives beyond the scope assuming the scope and deliverables are centered in the approach and proposal.

70. Does CNT have any internal employee work or resource group?

CNT does not currently have an internal work or resource group. Staff are engaged on particular initiatives, such as updating the employee handbook.

71. Is there any preference for in-state bidders over those out-of-state?

Chicago presence is not a requirement; however, our ideal consultant would have a depth of understanding of the local context in which CNT operates and be able to facilitate some in-person meetings.

72. What work has CNT done in the past, either internally or with outside consultants, in regards to strategic planning?

CNT has not engaged recently with outside consultants in regards to strategic planning other than the work in 2024 with Encolor. SWOT analyses were completed internally in 2023/4.

73. Do you expect to engage external stakeholders in the strategic planning process, or primarily board and staff members?

We anticipate that the advisory group, staff and board will all be involved in contributing to the theory of change, impact statement and strategic plan, with the advisory board overall spending more time on the process. CNT is open to and encourages partners to be involved in the process as interviewees but not as members of the advisory group. CNT can provide contact information for prospective interviewees.

74. Do you believe an environmental scan (that looks at both internal and external factors influencing the organization) would be beneficial?

Additional analysis may be beneficial to complement the assessments that have thus far been completed.

75. Is formal training in the Jemez Principles of Democratic Organizing, the Principles of Environmental Justice, and/or the Just Transition framework a requirement of the consultant? Or is it sufficient that the consultant operate in alignment with the values expressed in those principles and frameworks?

CNT's ideal candidate uses the Jemez Principles of Democratic Organizing, the Principles of Environmental Justice, and the Just Transition framework to guide their work, or supports clients or partners who do. In your proposal, please include how you operate within and are aligned with these values and principles.