Greetings from Oregon State University.

The Office of the Provost is reaching out to a short list of firms to determine their interest in partnering with the University to design our next strategic planning development process. Details are included below.

If your firm is interested, we would be pleased to receive your proposal, including responses to the questions below, no later than Friday, September 23.

Proposals may be submitted directly to me at Gigi.Bruce@oregonstate.edu.

OVERVIEW

Oregon State University will launch the development of its fifth strategic plan in Fall 2022. The University community refers to this installment as SP5.0.

The University’s current five-year strategic plan – SP4.0: Transformation, Excellence, and Impact – will end in December 2023.

SP5.0 is expected to deepen the University’s strategic goals and actions based on current and emerging strengths. SP5.0 will prioritize investments and opportunities for 2024 – 2028 and provide a roadmap for all university leaders as they develop accompanying strategic plans for their colleges, divisions, and units.

Guided by the University’s Vision 2030 – a 2017 document that will be updated in the coming months – SP5.0 will continue the University’s long-term commitment to systematic strategic planning.

Development of SP5.0 will be guided by a robust engagement plan, which will include faculty, staff, students, stakeholders, and community members.

A draft of SP5.0 will be presented to the OSU Board of Trustees at their June 1-2, 2023, meeting and a final version will be presented for their approval at their October 18-20, 2023, meeting.

PROPOSAL REQUEST CONTACT

Name: Gigi Bruce
Title: Chief Assistant to the Provost
Telephone: 541-737-8414 or 541-230-0873
E-Mail: gigi.bruce@oregonstate.edu

QUESTIONS/CLARIFICATIONS DEADLINE

Questions or clarifications about the proposal request should be directed to the Proposal Request Contact no later than Friday, September 16, 2022 at 3:00 pm, PST.
SUBMISSION DEADLINE

Proposals are due to the Proposal Request Contact no later than Friday, September 23, 2022 at 11:59 pm, PST.

SCOPE OF WORK

Contractor shall provide the following services in relation to the process described in 8b below:

- Guidance on the overall design of the strategic planning development process which takes into consideration myriad internal and external stakeholders, the university’s commitment to shared governance, and the university’s commitment to diversity and equity
- Facilitation of stakeholder and dialogue sessions (including both Zoom and in person sessions)
- Synthesis of ideas generated
- Ongoing guidance to the steering committee, which will draft the strategic plan
- Feedback on drafts of the strategic plan
- Consultation on the communication strategy which will accompany the plan development strategy

REQUESTED QUALIFICATIONS/CERTIFICATIONS

- The firm and assigned professionals have experience and demonstrated success with strategic planning.
- Demonstrated commitment to the core values of diversity and equity in the development of strategic planning.

SUBMITTAL DOCUMENTS

Proposals should include the following:

1. Description of how your firm would meet the objects outlined in the Scope of Work.

2. List of university strategic planning efforts your firm has contributed to over the past five years. Please include institution name, year, and outcome (including a link to the final version of the strategic plan). Please be sure to highlight experience with comparable Research I and land-grant institutions, if appropriate.

3. Description of your firm’s commitment to embedding diversity and equity in strategic plan development.

4. Pricing structure and an overview of the services typically provided. In addition to pricing for core services, you may provide pricing for any optional services that might be considered.

5. Names and bios for the individuals who will work directly on this project, indicating who will serve in leading and supporting roles. (Include details about where each of these individuals are based and their specific qualifications for the projected work.)

6. An overview of the communications support services your firm can provide.

7. Three to five (3-5) references for work of comparable scope at institutions of similar types and sizes. OSU reserves the right to contact references.

8. Responses to the following questions:

   a. What do you consider to be the two most fundamental factors in ensuring a successful strategic planning effort? How is your firm well positioned to provide guidance and direction on best practices?
b. The work must be conducted within the timeline indicated below. Please provide a rough outline of how your services might be conducted within this timeframe. The two asterisked October 2022 meetings are scheduled and require the participation of the firm. Other dates may be adjusted or set in consultation with the firm, except for the June 2023 and October 2023 dates of the OSU Board of Trustees.

- *October 19, 2022, in-person meeting on "enterprise risk" with OSU senior leaders
- *October 26, 2022, in-person retreat of the OSU Board of Trustees and senior academic leadership
- October 2022 – April 2023: Engagement period with dialogue sessions and focused stakeholder sessions (likely around a dozen, some in person but most conducted by Zoom to ensure greater participation)
- Throughout: Engagement with the SP5.0 Steering Committee
- April 2023: Final university-wide forum (to present preliminary themes and findings)
- June 1-2, 2023: Share draft plan with OSU Board of Trustees at their meeting; also share for public comment and review
- June-October: Final phase of feedback; finalize plan
- October 18-20, 2023: Submit to OSU Board of Trustees for their approval at their meeting
- January 2024: Official launch and implementation

**SELECTION**

OSU may select the supplier who, in OSU’s opinion, best meets the scope of work, qualifications/certifications, and price, as determined through the evaluation process, which may include scoring and ranking, discussions and revised proposals, interviews and demonstrations, site visits, or negotiations.

We hope your firm will consider submitting a proposal. If you have any questions, please let me know.

Sincerely,

[Signature]

Gigi Bruce
Chief Assistant to the Provost