



## 2024 Strategy Development & Planning RFP – Q&A

This document provides responses to questions submitted by bidders by the January 16<sup>th</sup>, 2024, due date, as listed in the request for proposals (RFP). Please note the order of the questions are based on the order in which they were received.

	Question	Response
1	What unique barriers from WestEd should we keep in mind as we design a strategy and roadmap for intermediate actions and long-term vision and goals?	Our context is unique, but our barriers are not out of the ordinary. We are a national organization that primarily focuses on research, technical assistance, and professional services with federal, state, and local organizations involved with early education to higher education, and health and human services. We are seen as leaders in our field. We have a nearly 60-year history with dramatic growth in recent years and a new CEO. We are ready to revisit and refresh our strategy with significant attention paid to the wisdom and expertise of our staff.
2	Has WestEd had any former strategy plans that have failed, if so, why?	No. Annual and periodic planning cycles have been successful in the past. This effort takes a more comprehensive approach to our strategy planning.
3	Who is your North Star competitor in the market at this current moment?	There are several organizations in our ecosystem with whom we compete and collaborate. We will work with the selected firm to develop a list of benchmark peers.
4	What external factors should we keep in mind as we design a plan for a strategy and roadmap for long-term vision and goals?	We are looking for a partner that has insights into the markets we serve and brings an understanding of external factors that fit into our context and likely experience. We will work with the selected firm to identify external factors influencing strategy development.
5	Given WestEd's recent rapid growth and leadership change, how would the organization describe its current strategy? What are the priorities in any existing strategy or strategic plan? How well are these priorities being implemented?	WestEd's strategy today is informed by prior agency-wide planning initiatives, most recently "WestEd 2025" and establishment of both periodic and annual priorities as established in the RFP. WestEd's considerable growth in recent years as well as successful investments into programmatic initiatives suggests its priorities are well supported in the agency. Our portfolio of work is broad and deep. WestEd today is looking to develop a strategy that works across the full agency rather than a series of identified priorities for its future.
6	Looking forward, does WestEd anticipate that the 2024 strategic planning effort will result in	This plan will help us guide how we approach our future and deliver on our mission. We are not



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	<p>a major strategic shift or more of an evolution of the organization’s current work? How does the organization’s rapid recent growth impact the way that the organization is thinking about its structure and resources going forward? Is this rate of growth expected to continue? How does the organization’s structure as a JPA impact the level of flexibility it has to pursue changes to its strategy?</p>	<p>looking to reinvent WestEd through this plan, rather we need a plan that captures what we should maintain and grow and where we can shift and evolve to position and ready ourselves to further our mission and impact in a changing world.</p> <p>WestEd is a Joint Powers Authority and operates as a non-profit organization per IRS Code, Section 115(1). As such, we face similar constraints with regards to financial management that may be found in a non-profit or public agency. We will work with the selected firm to help them develop a deeper understanding of our history including our JPA status.</p>
7	<p>Looking backward, what has not worked well in past strategic planning efforts?</p>	<p>Our organization has changed in so many ways in the last few years that the context of current planning means we are focused on our impact in the future.</p>
8	<p>Who are the key stakeholders to engage in this process, and how does that vary by topic area (e.g. identification of North Star, roadmap development, etc.)? How does the organization envision the role of the Board, given its 55-person membership (e.g. smaller Steering Committee; committees by topic area or divisional focus; other)?</p> <p>Are there key external stakeholders that should be a part of this effort or engaged along the way?</p>	<p>We will work with the selected firm to identify key stakeholders, internal and external, to engage in this process. We envision this including broad engagement of our staff through surveys, focus groups, and work sessions; touch points with the Executive Committee of our Board; Board engagement as mentioned in the RFP, engagement with agency leaders from both infrastructure and program, Executive Leadership Team, and interviews and outreach with partners and clients. The consultant will advise/recommend the depth and breadth of staff engagement, while ensuring quality of engagement and maintaining an equity lens.</p>
9	<p>What are the key elements of WestEd’s organizational “ways of working”? What are the most effective forums for (i) engaging/informing stakeholders, (ii) gathering feedback, and (iii) driving to decisions?</p> <p>Does the organization have more of an in-office vs. virtual culture today? If hybrid, what types of meetings or events tend to be most</p>	<p>We have a hybrid work environment (remote and on-site staff). We have a variety of leadership teams and community forums that meet regularly both virtually and in-person depending on the nature of the meeting and need (engaging, driving decisions, feedback, etc.). We are open to recommendations.</p>



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	effective for each of the types of activities listed above?	
10	To what degree does WestEd envision that their strategic planning partner is helping to actively shape or develop the direction of the strategy vs. operate in more of a facilitation capacity, or do both?	We seek a firm that can both actively shape our plan and guide us through a highly engaging process.
11	Who will be the day-to-day point person for this effort?	The Executive Operations Director, who reports directly to the CEO, will support the day-to-day efforts.
12	What market research or market scans have already been completed? Please provide additional details. Are there any known gaps or areas where additional research is known to be necessary?	We are currently engaged with an external consultant who is leading market scans that we will share at the beginning of the engagement. These scans will also identify areas of gaps and additional research.
13	We understand that you have prioritized ‘Equity’ and ‘Whole Child’ as topical areas for WestEd going forward. Conversely, are there any educational topics or trends that you have <u>deprioritized</u> as areas of focus and investment?	We have many areas that we have declared priorities, and we are expecting that the strategy development process will help us focus our priorities with a longer-term perspective.
14	Outside of ELT and the Board, who are the key stakeholders to involve in the strategy design process?	See response to Question 8.
15	Does WestEd expect to involve Board Members in the design process, or only in read-outs?	See response to Question 8.
16	Will WestEd want input from other staff members on the 5-year north star and strategy?	See response to Question 8.
17	Does WestEd seek external perspectives (e.g., experts, clients) in informing its North Star and strategy?	Yes, we expect the selected firm to provide external perspectives in informing our North Star and strategy.
18	Does WestEd seek to include an equity lens in designing its go-forward strategy? I.e., how will notions of equity inform the process of designing the strategy and how central will equity be in defining the North Star? (We view this as separate from Equity as one of your topical focus areas.)	Yes, we do seek to include an equity lens in designing our go-forward strategy and in the process of strategy development. We want to make sure we have significant engagement of our staff and ensure we express our mission through our work. Also, see response to Question 8.
19	Will workshops/ read-outs take place at WestEd’s offices?	See response to Question 9.

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20	In addition to the four documents you have put together in preparation for the strategy refresh (Board and Leadership Discussion of Enduring Challenges, Market Analysis, Enterprise Risk Assessment, Strategy and Goal Planning Document), does WestEd have any documents on staff attitudes and perspectives of its current strategy (e.g., pulse checks, surveys on staff perspective on vision)?	Yes, we do have staff survey results, analysis, and additional documents that will inform perspectives of our current strategy that we can share with the selected firm.
21	Can the term of the agreement/ duration of the engagement be shorter than the 8 months proposed?	We will let the selected firm define the duration based on size and scope of work. We are open to this process being less than 8 months, but it can be no longer than 8 months, as we have a hard deadline to bring our plan before our Board in October 2024.
22	Would you consider this a <b>strategy refresh or is there openness for a more significant strategic pivot</b> (e.g. is this about clarifying strengths and identifying opportunities to build on them or a chance to more holistically define a new approach)?	See response to Question 6.
23	What is <b>motivating the strategy development process</b> in 2024, aside from having a new CEO? Are there other internal or external factors motivating this review?	Recent organizational changes and growth along with our vision for the future are motivating this review.
24	What do you see as the <b>timeframe for the strategic approach</b> ? Are you looking for a shorter-term strategic framework and roadmap (2-4 years) or something more long term (5-10 years)?	We are looking for a 3–5-year framework and roadmap.
25	How comprehensively are you hoping to <b>engage staff beyond the Executive Leadership team</b> (e.g., aiming to consult as many staff as possible vs. seeking deeper representative engagement)?	See response to Question 8.
26	How closely do you <b>envision the Board of Directors being engaged</b> in the process? Will a subset of the Board be available to engage in a more regular capacity (e.g., as part of a Steering Committee)?	The Executive Committee will be available to engage as needed and will also be part of the final read-out. Also, see response to Question 8.



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27	Given the organization's size, what are the expectations for how the consultant will engage WestEd staff in strategy development?	See response to Question 8.
28	How does WestEd anticipate engaging its board in the strategy development process? Will the consultant engage directly with the board and/or committees and in what venues?	The Board's Executive Committee will provide input to the strategy development process along with the Executive Leadership Team, which includes the CEO plus three Chiefs, and three Division Directors. Also, see response to Question 8.
29	To what extent has WestEd engaged with internal stakeholders, including staff, in its preparations to refresh the organization's strategy?	We have engaged in sessions to learn more about values and change at WestEd with the Board and Senior Leadership. We have also shared details about the strategy development process with staff and the new CEO has completed over two dozen staff "Listen and Learn" sessions that engaged staff in discussion of strengths, areas of improvement, and hopes for the future. Information from these sessions can be shared with the selected firm once a contract is in place.
30	To what extent has WestEd engaged with external stakeholders, including peers, clients, and students/families in its preparations to refresh the organization's strategy?	We recently completed interviews with external stakeholders, clients, and partners to inform planning for strategic communication and to refresh and redesign our website. Information gathered through this process can be shared with the selected firm once a contract is in place.
31	To what extent is WestEd interested in hearing perspectives from additional internal and external stakeholders as part of the strategy development process?	See response to Question 8.
32	Has WestEd identified any other priorities – in addition to Equity and Whole Child – for internal and external work? Does WestEd have working definitions for these priorities that you might be able to share?	We have identified priorities and created plans related to our impact and people. In addition, we are in the midst of annual planning for our external work. We can share information from these plans with the selected vendor once a contract is in place.
33	The RFP notes the refreshed strategy should <i>"guide strategic allocation decisions and other decisions related to our impact, innovation and growth."</i> Is the WestEd team seeking an analysis of their business model as part of this scope of work?	We plan to use the results from the strategy development to inform our business planning. While analysis of the business model may emerge as an area of focus from this engagement, it is not in the foreground of our expectations.

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34	<p>Who is the intended audience and/or possible use cases for the implementation plan and roadmap deliverables? Could you tell us a little bit more about how you hope to be able to use these deliverables to inform your work?</p>	<p>The resulting strategy framework and roadmap will guide planning and decision making by WestEd’s Executive Leadership Team and leaders who are seeking direction in understanding agency priorities, inform the Board in their adoption of goals for WestEd, and provide an anchor for internal and external communication about WestEd’s work and brand.</p>
35	<p>Strategy and organization have to align to be successful. What are some of the major organizational change management challenges that will need to be addressed during strategic planning in order to make decisions about WestEd's strategy (vs. addressed during implementation of a strategic plan)?</p>	<p>WestEd is ready to embark on the strategy development process with Executive and Senior leaders ready to support this process and resulting changes. Our change management challenges are typical of any organization with a distributed workforce and recent growth.</p>
36	<p>We support organizations in making decisions during strategic planning by bringing together three things: (a) an organization's values, (b) data, and (c) dialogue.</p> <p>2a. On Values. Strategic planning frequently surfaces tensions within an organization about its values. How an organization resolves those tensions drives decisions on what work it does, for whom it does work, how it does this work, etc. If appropriate, can you share what - if any - values are emerging as points of tension that strategic planning needs to address?</p> <p>2b. On Data. Is there additional critical <u>external</u> market data that has not yet been collected by recent consulting work that you would want a partner to capture in order to further inform strategic planning? Is there additional critical <u>internal</u> data that has not yet been collected by recent consulting work that you would want a partner to capture in order to further inform strategic planning?</p>	<p>These questions all relate to engagement and audience, and we anticipate delving into them more deeply with the selected firm. Our high-level responses follow.</p> <p>2a. On Values - WestEd’s values – found on our website – are valuing research and research-based policy and practice; integrity and excellence; equity; and impact. WestEd values are strong and widely supported by staff.</p> <p>2b. On Data - We believe that we have the external and internal data needed to create a thoughtful and rigorous strategic plan. (See question 12). We will work with the selected firm to identify additional internal &amp; external data depending on the consultant’s assessment of existing data.</p> <p>2c. On Dialogue – See response to Question 8.</p>

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	2c. On Dialogue. We know people are more invested in the destination when they are part of the journey, and that strategic planning is most successful when it is inclusive of a broad range of stakeholders. How would you like internal staff at levels of seniority below the ELT involved as part of strategic planning, and in what role? Who are key external stakeholders whose voices needs to be heard as part of planning?	
37	Do you want your consulting partner to be responsible for building a financial model as part of the strategic plan, or will financial modeling be led by internal staff with consulting support to provide key model inputs as key priorities (and the resources required to execute them) become clear?	We have a robust internal financial team that will partner with the consultant to provide detailed financial modeling and data.
38	In terms of logistics, how much of the ELT's work is virtual vs. in person? Is the ELT in favor of in person working sessions as part of strategic planning? If so, are there already planned in person meetings we should try to organize this work around?	The ELT meets in person and virtually. We have scheduled planned meetings for the year (both virtual and in-person) around which this work can be organized. We can also schedule additional meetings depending on the engagement needs.