



Request for Proposals (RFP)
Strategic Plan Overhaul & Rewrite
Shaping Our Appalachian Region, Inc. (SOAR)

Issued: April 15th, 2025

Responses Due: May 16th, 2025

I. Introduction

Shaping Our Appalachian Region, Inc. (SOAR) invites proposals from qualified firms or individuals to conduct a comprehensive overhaul and rewrite of SOAR's strategic plan. This effort aims to clearly define SOAR's short-, medium-, and long-term organizational goals and establish a framework for measuring the direct impact of our initiatives. The selected consultant will work closely with SOAR's leadership, team members, and board representatives throughout the process.

II. Background

SOAR is a 501(c)(3) nonprofit organization dedicated to advancing economic mobility for individuals in Eastern Kentucky. Our mission is to transform lives by empowering individuals to secure employment and achieve economic self-sufficiency. SOAR works to break cycles of generational poverty through initiatives focused on workforce development, entrepreneurship, and healthy communities. As SOAR continues to expand its impact, a revised strategic plan is critical to ensuring our work remains focused, measurable, and aligned with long-term regional transformation.

III. Scope of Work

The selected consultant will facilitate a strategic planning process that includes the following components:

1. Assessment & Stakeholder Engagement

- Conduct interviews and focus groups with SOAR leadership, staff, board members, and key stakeholders.
- Review existing strategic documents, reports, and performance metrics.
- Identify strengths, weaknesses, opportunities, and threats (SWOT analysis).

2. Strategic Framework Development

- Define SOAR's short-term (1-3 years), medium-term (3-5 years), and long-term (5+ years) goals with clear objectives and measurable outcomes.
- Establish key performance indicators (KPIs) to track impact.
- Ensure alignment with SOAR's vision, mission, and priority initiatives.

3. Implementation Plan & Final Deliverable

- Develop a phased implementation plan with action steps and accountability measures.
- Deliver a comprehensive, visually compelling strategic plan document.
- Present final recommendations to SOAR leadership and board member

IV. Proposal Submission Requirements

Proposals should be submitted in PDF format and must include:

1. **Cover Letter** – A brief introduction summarizing the firm’s qualifications and interest in the project.
2. **Experience & Qualifications** – A description of relevant experience, including previous strategic planning engagements.
3. **Approach & Methodology** – A detailed outline of the proposed approach, timeline, and engagement process.
4. **Key Personnel** – Names and qualifications of individuals who will lead and participate in the project.
5. **References** – Contact information for at least three references from similar projects.
6. **Cost Proposal** – A detailed budget, including hourly rates, anticipated travel expenses (if applicable), and total project cost.

V. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- **Approach & Methodology (30%)** – Thoughtfulness, feasibility, and alignment with SOAR’s needs.
- **Experience & Qualifications (25%)** – Relevant experience, expertise, and past performance.
- **Cost Proposal (20%)** – Cost-effectiveness and overall value.
- **Stakeholder Engagement Strategy (10%)** – Ability to incorporate input from SOAR staff, board members, and community partners.
- **References & Past Work (10%)** – Feedback from previous clients and quality of past strategic planning projects.
- **Preference for Eastern Kentucky-Based Consultants (5%)** – Proposals from consultants based in or with deep experience in Eastern Kentucky will receive additional consideration.



VI. Submission Deadline & Contact Information

Proposals must be submitted electronically to soarrfp@soar-ky.org no later than **5 PM ET on May 16th, 2025**. Late submissions will not be considered. Questions regarding this RFP may be directed to soarrfp@soar-ky.org