

Harvest Foundation

Strategic Planning RFP Checklist

Please note that the official Request for Proposals (RFP) is the ultimate point of reference for all requirements and submissions. The materials provided here are intended as a helpful tool to guide applicants in preparing their proposals, but in the case of any discrepancies, the language and instructions in the RFP take precedence.

1. General Information

- ☐ List name, title, address, phone, and email of each consultant/team member.
- ☐ Designate one primary point of contact if submitting as a group/partnership.

2. Consultant Qualifications & Roles

- ☐ Provide description of firm/individual qualifications.
- ☐ Explain expertise in rural, community-driven strategic planning.
- ☐ Document experience in consensus-building, facilitation, and conflict management.
- ☐ Note knowledge in budgeting, marketing/communications, community investment.
- ☐ Assign roles/responsibilities of each consultant in the team.
- ☐ Attach resumes of all project team members.

3. Work Plan

- ☐ Describe activities for each stage of the scope of work.
- ☐ Include timeline with milestones.
- ☐ Provide budget by line item, tied to milestones/deliverables.
- ☐ Include a proposed payment schedule.
- ☐ Add a sample project plan plus a second example of similar work.

4. References

- ☐ Provide three client references with name, title, address, phone, email.
- ☐ Ensure references can speak to experience on comparable projects.

5. Previous Work Product

☐ Attach at least two samples of written work (strategic plans, facilitation reports, etc.) comparable to the requested scope.

6. Proposal Format

- ☐ Keep proposal within 20 pages (excluding attachments).
- ☐ Prepare in PDF format, printable on 8.5x11 portrait orientation.

7. SBA Identification

☐ Note if the firm qualifies as a small business, women-owned, or minority-owned enterprise.

8. Conflict of Interest

- ☐ Include a disclosure exhibit: state whether conflicts of interest exist.
- ☐ If yes, provide explanation and mitigation steps.

9. Submission

- ☐ Submit via provided link by 5:00 PM EST, Oct. 13, 2025 (late or mailed submissions not accepted).
- ☐ Clearly mark any confidential or proprietary sections.

Timeline Reminders

- RFP Release: Sept. 15, 2025
- Proposal Due: Oct. 13, 2025 (5:00 PM EST)
- Vendor Selection: December 2025
- Project Start: January 2026