

## World Bird Sanctuary Strategic Planning Questions and Answers

1. A five year action plan is a much longer planning timeframe than we currently do (we transitioned a few years ago to a more “real-time” planning model). We typically do a long-term vision (your desire for a 10 year vision would work in our model), and then a strategic direction that is almost timeless in that it would work for as long as it is still relevant, and then a system of annual strategic review and workplan development. Our model allows for changes in the environment to be taken into account and seems to be more relevant than a document built three or four years in advance. Would you be open to a proposal using this kind of a planning model?

Answer: I have never done it that way before but we would be open to a proposal using this type of strategic planning model.

2. How large is your strategic planning committee and who sits on it (I don't need names, just trying to get a sense if it is board /you only or a combination of board and staff)?

Answer: The strategic planning committee consists of seven individual - the Executive Director and six board members.

3. What role will staff play?

Answer: The staff will play a significant role in developing the strategic plan. We want to facilitate input from all staff members and incorporate their ideas where possible. Additionally, members of the staff at all levels will participate in any working groups to develop elements of the strategic plan.

4. It looks like you might have a strategic planning committee meeting scheduled for September 11 at 5pm...yes? How often will the committee meet? Do you have a defined process that you'd like followed? How many times will the committee meet?

Answer: We do not have a Strategic Planning Committee meeting on 11 Sep. This would be the first day the consulting firm starts working. That would include a meeting with me, reviewing documents and finalizing the way ahead. The following day, 12 Sep, would be a strategic planning committee. Here is the current Strategic Planning Committee meeting schedule: 18 July, 15 Aug, 12 Sep, 17 Oct, 14 Nov and 12 Dec. Following the September meeting we will decide if we need to meet every two weeks or keep the meeting schedule at once per month. We have not defined a process in detail – the general process outline is as follows:

1. Review with consultant all pertinent documentation and ongoing projects.
2. Meet with all employees to draw out their ideas. The groups would be peer groups so no one feels uncomfortable voicing their thoughts.
3. Survey guests, volunteers, donors.
4. Develop a 10 person working group which will include, at a minimum, board members, senior staff and junior staff.

5. Package results from the working group into usable documents (conducted by executive director and small group of staff)
6. Present final package to the strategic planning committee for approval
7. Present at full board meeting for final approval and implementation.

5. Will you be serving as the “process leadership” or will the strategic planning committee chair also serve in this role? Do you have availability to be involved in making sure the process is adequately designed?

Answer: I will serve as the process leader for the project and will work directly with the consulting firm in the design of the process.

6. How many background interviews do you anticipate?

Answer: During the planning session we would anticipate conducting interviews with the naturalists in two groups since we still have to run operations and can't do them all in one group. We would also expect to conduct individual interviews with senior staff (Executive Director, Deputy Director, Development Director and Director of Operations), conduct a group interview with other staff members and a group interview with select volunteers. We would plan on using surveys for visitors and donors.

7. How do you want to collect visitor input? (We can work with a customer market research firm...their product is very good, but it takes the cost up a huge level).

Answer: I see this being done in two ways. One is through looking at the reviews posted on our facebook, tripadvisor, yelp, etc. The second would be designing a questionnaire/survey we could send out to visitors who signed the visitor book and also hand out to visitors at WBS and asking them if they would be willing to take some time and fill out a survey. This may not be as effective as a customer marketing research firm but more cost effective. We would however look at other options consulting firms would have on the subject.

8. Do you have a target budget? Has a budget been established for the strategic planning process?

Answer: The budget allocated for this project is up to \$15,000. Our target is \$10,000 - \$12,000 but wanted to give ourselves some flexibility to go over that target if necessary.

9. Is data on outcomes or satisfaction with educational programming available for review?

Answer: We do not have any formal process to receive that information. Right now, occasionally we will receive a call, email or facebook post that provides us that information. We have never received negative feedback on our educational programs but since there is no formal process it is really unknown areas we might need to improve upon.

10. Do you routinely survey members and non-member visitors? Will this information be available to the strategic planning consultant? Is there a member/ visitor data base that can provide access to these groups for survey participation?

Answer: We did conduct a survey at the end of 2016 of supporters of World Bird Sanctuary and that survey will be available to the consultant. We do have a donor database called Bloomerang that the consultant will have access too. Bloomerang is also what we use to input data on visitors to WBS. We have visitor logs at the nature center and visitor/gift shop where visitors can add their information. This information is then manually added into our Bloomerang database.

11. How many volunteers do you typically have on an annual basis? Is there a volunteer management system that can provide data / access to volunteers for participation in a survey?

Answer: We currently have 334 volunteers listed in our database and 126 have been active in the last 6 months. We use Volgistics as our volunteer management system and it can provide the data necessary to get a survey out to our volunteers for participation in a survey.

12. Are you currently working with a creative agency? Do you have an incumbent agency or someone in mind for this project?

Answer: We are not currently working with a creative agency. We did send the RFP directly to three consulting firms in the St. Louis area but are open to all proposals and will evaluate all on their merit using our evaluation criteria.

13. Do you have a preference to work with someone local?

Answer: We are accepting from local and out of town agencies. We have no preference – we are looking for the best fit for World Bird Sanctuary.

14. One of the criteria in your evaluation matrix under assigned personnel is "Are sufficient people of the requisite skills assigned to the project?" Are you looking to work with a larger team?

Answer: The size of the team isn't our primary concern. We do want to make sure the team can accomplish the tasks needed and stay on our timeline but the skills of each team member is the primary factor.

15. Are you looking specifically for a consultant who has experience with wildlife conservation organizations? Would wildlife conservation experience outweigh overall experience?

Answer: We understand that not many consultants have wildlife conservation experience so this isn't a necessity; it is a nice benefit to have but not required. This will not outweigh overall experience especially with consultants who have non-profit experience. We feel the non-profit experience is the most important aspect as we review proposals.

16. Have you previously engaged in a strategic planning process?

Answer: World Bird Sanctuary did attempt to develop a strategic plan many years ago but did it internally. Didn't work well and wasn't beneficial to the organization. This will be the first time WBS has invested this much money and time into a strategic planning effort.

17. What was the impetus of this project and what made you decide that now was the best time to move forward with it?

Answer: The Executive Director has been on board for about 1 year now. The board and Executive Director feel that in order for us to effectively move forward as an organization we must have a workable strategic plan.

18. Your RFP mentions providing the resumes of our team members – our proposal introduces our team members and gives a short bio to describe our roles, skill sets, and experience. Will this be sufficient, or do you require an exhaustive work history?

Answer: We do not require a full resume. We just need to see the relative skill sets and experience the individuals who will be working with WBS so we can evaluate if the consultant team has the necessary skill sets to accomplish our strategic planning goals.