

Strategic Planning: Non-Profit Request for Proposal Activity Case

Anthony Piscitelli
Sean Campbell
Sean Geobey
Miles DePaul



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Abstract

Laurier Students' Public Interest Research Group (LSPIRG) is a non-profit organization funded by student fees operating at Wilfrid Laurier University, which seeks to provide opportunities for students to engage in social change. LSPIRG is in the process of creating a new strategic plan. In preparation for the planning process, the Board of Directors is about to issue a request for proposals (RFP) to solicit a consultant to assist in facilitating the strategic planning process. In this simulation, students will create an RFP scoring system to evaluate submissions and select the best proposal from two choices.

Learning Objectives

- Examine a potential conflict of interest situation.
- Develop criteria to evaluate a request for proposals.
- Evaluate submissions to a request for proposals.



Case Introduction Discussion

Introduction

Laurier Students' Public Interest Research Group (LSPIRG) is a non-profit organization that is funded by a student fee charged to most students who attend Wilfrid Laurier University. LSPIRG operates under the Public Interest Research Group (PIRG) model. A PIRG is designed to provide leadership opportunities by allowing students to start their own campus projects¹. The selection of most projects is done by student volunteers and supported by PIRG staff. Students interested in working on a project found a PIRG Working Group. These working groups can pursue any projects they wish as long as they align with the values of the local PIRG, thus providing a great deal of flexibility to students on campus to pursue opportunities to create a more socially just society.

LSPIRG was incorporated in 2006 after the successful passing of a referendum to establish a student fee for undergraduate students at Wilfrid Laurier University. For the first few months, before the student fee was first collected in September, LSPIRG relied on volunteers, modest grant funding to hire a summer student, and a line of credit from Wilfrid Laurier University to establish the organization.

Anthony Piscitelli served as a key member of the organizing committee for the referendum, volunteered as the first President, was one of the first four Board members, and supervised the summer student as a volunteer for the organization. He was also an active member of Laurier Students for a Public Interest Research Group (LS4PIRG), the campus club which preceded LSPIRG.

LS4PIRG was founded by Sean Geobey in 2001, as a campus club with the expressed goal of creating a PIRGs at Wilfrid Laurier University. PIRGs started in the 1970s at university campuses in the United States and Canada. The first PIRG in Canada was founded at the University of Waterloo in 1972² and spread to many other Ontario University campuses but notably, despite being just up the road from the University of Waterloo, a PIRG did not spread to Wilfrid Laurier University for three decades.

In the summer of 2006 LSPIRG held the first elections for a Board of Directors. Notably, Anthony Piscitelli did not stand for election, giving up his seat on the board. He then applied to be LSPIRGs first Executive Director. Sean Geobey also applied for the role of Executive Director.

After the first round of interviews, the LSPIRG Board of Directors narrowed it down to Anthony Piscitelli and Sean Geobey. The two being good friends, presented a proposal to turn the full-time Executive Director role into a half time Executive Director and half-time Coordinator role with equal authority for the same cost as one full-time Executive Director. The Board of Directors accepted this proposal and put a process in place where any disagreements that could not be

¹ Sean Geobey, *For a Public Interest Research Group* (LS4PIRG, 2002).

² Peter Cameron, Peter and Karen Farbridge "PIRG Power," *Alternatives Journal* 24.3 (1998).



resolved would be decided by the Board of Directors. Anthony Piscitelli chose the title of Executive Director and was primarily responsible for financial reporting and operational matters. Sean Geobey chose the title of Coordinator and focused on volunteer development and capacity building.

Preliminary Discussion Questions

- 1) Should LSPIRG have hired the former LS4PIRG campus club founder as a staff member?
- 2) Should LSPIRG have hired the former Board President as Executive Director?
- 3) Should LSPIRG have split the role of Executive Director into an Executive Director and Coordinator with equal authority?



Activity Number One: Develop Scoring Sheet

Background

Sean Geobey stayed on as Coordinator for one year. While there were no conflicts that needed to be taken to the board for resolution, the following year when Sean Geobey left the organization it was felt LSPIRG would be best served by having a single individual report to the Board of Directors in a more traditional Executive Director structure.

In the summer of 2007, the organization restructured making Anthony Piscitelli as Executive Director the senior staff person for the organization and the sole direct report to the Board of Directors. He hired a staff of four-part-time students who reported to him. The following year Anthony Piscitelli left the organization handing it off to a new Executive Director.

Over the next six years, LSPIRG became an established organization on Wilfrid Laurier University's campus. Between 2008 and 2014, the organization would go through several structural changes, eventually settling on two equal coordinators and a working board model. LSPIRG is now set to embark on a strategic planning process to prepare for the next five years.

The LSPIRG Board of Directors has issued a request for proposals (RFP) for consultants to provide three months of assistance to support the next strategic planning process (see Exhibit A).

Activity Number One

Use this LSPIRG RFP to design a scoring sheet to evaluate submissions. The score card should evaluate proposals out of 100 possible marks. Your task is to decide what criteria to use to mark proposals and to assign a value to each criterion.

- 1) Select the criteria you will use to evaluate the proposal.
 - a. Ensure you include in your criteria at least one that speaks to the total budget. (For this criterion, assume that LSPIRG has budgeted to spend up to \$10,000 on the consultant but prefers to keep the costs to about \$5,000.
 - b. When designing the criteria, in addition to those activities listed explicitly in the RFP consider if you will include a criterion related to the values of the organization.
- 2) Determine how many marks, out of 100, to assign to each of the criteria selected.
- 3) Decide who will evaluate the proposals and select the consultant? Will staff be involved? Will the entire board participate or a subcommittee?



Activity Number Two: Proposal Evaluation

Background

The LSPIRG RFP elicited two proposals worth reviewing in detail. A proposal was submitted by consultants Miles DePaul and Sean Campbell (see Exhibit B). A second proposal was submitted by former Executive Director Anthony Piscitelli and former Coordinator Sean Geobey (see Exhibit C).

Activity Number Two

Evaluate the two proposals against the criteria created in activity number one.

- 1) Mark each proposal individually first.
- 2) Come together as a group and decide how you will select a final score. Will you discuss each of the criteria scores or simply take the average score for each of the criteria?
- 3) Decide as a group if you will consider the proposal from Anthony Piscitelli and Sean Geobey.
 - a. Do you view their past involvement with the organization as an asset or a liability?
 - b. What do you see as the benefits and drawbacks of having Anthony Piscitelli and Sean Geobey facilitate the strategic planning process?
 - c. Would your answer change if you knew that Anthony Piscitelli and Sean Geobey were proud of the work the organization was doing but felt that LSPIRG had headed in the wrong direction since they left?
- 4) Compare your scores as a group and determine what score to give each proposal for each of the criteria.
- 5) What do you think about Sean Geobey appearing as a reference for Miles DePaul and Sean Campbell?
 - a. Does this help or hurt the DePaul Campbell proposal?
 - b. Does this help or hurt the Piscitelli Geobey proposal?
 - c. Does it have no impact?
- 6) Determine which proposal would you select as a group.



Conclusion

Conclusion

LSPIRG's board of directors scheduled interviews with the consultants who had submitted a proposal. It can be challenging for non-profits to schedule longboard of directors' meetings because the directors are all volunteers. LSPIRG decided to schedule the interviews back-to-back.

Anthony Piscitelli and Sean Geobey had their interview first. Miles DePaul and Sean Campbell were in the LSPIRG waiting room when Anthony Piscitelli and Sean Geobey exited the board room. The four proponents all knew each other well—with Miles DePaul and Sean Campbell listing Sean Geobey as a reference on the proposal to LSPIRG—and had a friendly exchange.

Each interview was approximately one hour in length, and the proponents were asked to present their proposals and answer questions from the board of directors.

The following week, the LSPIRG board of directors announced that the proposal submitted by Miles DePaul and Sean Campbell was selected. Between January and March of 2015, the winning consultants (1) conducted interviews with internal representatives of LSPIRG, (2) reviewed existing strategic documents, (3) facilitated an internal stakeholder planning session that scoped the discussion questions for a subsequent external stakeholder planning session, (4) wrote a strategic plan and presented draft findings to the board of directors, and (5) amended the strategic plan based on feedback from the board of directors. Miles DePaul and Sean Campbell provided an additional 3 months of ad-hoc support, meeting several times with staff and the board of directors to discuss implementation.

Miles DePaul and Sean Campbell were happy with the process and the strategic plan; however, they came to believe that their strategic plan did not take into account the high turnover in student-run organizations. Upon reflection, Miles DePaul and Sean Campbell committed themselves to (1) creating strategic plans that can survive turnover by including detailed implementation guides, and short- and medium-term goals in addition to the longer-term strategic goal; (2) take into account the capacity and level of sophistication of the organization; and (3) provide ad-hoc implementation support following the contract's completion.



Exhibit A

The following proposal was issued by LSPIRG (this RFP was published on LSPIRG's website <http://www.lspirg.org/blog/2014/12/19/call-for-proposals-strategic-planning-consultancy>)

LSPIRG Call for Proposals Strategic Planning Consultancy

Purpose: The LSPIRG Board of Directors seeks proposals from professional Strategic Planning consultants in Waterloo Region for a Strategic Planning process for our organization. The successful proposal should demonstrate how the consultant could assist our organization in facilitating a planning session, creating a plan document, and developing an executable strategy for achieving strategic goals.

Reports to: The LSPIRG Board of Directors

Location & Period of Employment: The successful consultant will be employed by LSPIRG for the duration of the planning process - an estimated period of 2-3 months (January-March, 2015).

General Duties & Responsibilities:

- Conduct preliminary research with the support of LSPIRG staff and Board members (analysis of previous planning data, conducting focus groups, etc.)
- Facilitate a 2-day planning session in Waterloo, incorporating direct and indirect feedback from a variety of stakeholders
- From this session, create a 5-year plan document detailing collectively decided upon values and strategic goals
- Develop an executable and easily digestible strategy for achieving strategic goals for LSPIRG staff and Board members to follow over the next 5 years
 - Include in this strategy a mechanism for evaluating progress of the plan

Qualifications:

The successful candidate will present a proposal that demonstrates competency in delivering on the duties outlined above. Further, the following qualifications would be considered an asset:

- Knowledge of or past experience with our organization
- A commitment to our current organizational values as stated above
- Minimum 2-3 years professional experience with Strategic Planning
- Strong leadership abilities
- Ability to work well in a team environment where diverse and sometimes opposing opinions are present
- Ability to successfully mediate difficult conversations in such an environment

Deadline for Proposals: January 2nd, 2015



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Exhibit B

Strategic Planning Project for LSPIRG

Prepared By:

Scaled Purpose Inc.

Miles DePaul | [email]

Sean Campbell | [email]



January 2, 2015



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THE OPPORTUNITY

As a consultancy focused on identifying scalable approaches to sustainability, social justice, and equity, we are thrilled at the opportunity of working with LSPIRG on shaping the organization's long-term strategic plan and roadmap to impact over the next three to five years.

In order to prepare a workable strategic plan that extends beyond a shareable document, Scaled Purpose will utilize its core competencies in directed interviews, facilitated stakeholder working groups, and human-centred design thinking. Scaled Purpose has built its business on a combined 10 years of experience developing strategic plans for nonprofits, founding and launching environmental charities, raising over \$1M in funding from private, public, and corporate sources, and in leading academic reviews of innovative governance structures. At Scaled Purpose we utilize a human-centred design methodology in all of our work, placing key stakeholders at the centre of decision making and information flow. In the case of the strategic plan for LSPIRG, we believe that it is important to explore all stakeholder desires, and to generate opportunities for increasing the strength of the value proposition of this initiative.

Our approach was honed, first, in our work with Sustainable Waterloo Region (SWR) which provides a compelling and relevant example of the power of civil society to influence business action. Established in 2008, SWR engaged representatives from all sectors of Waterloo Region, including academia, private, government, NGOs, and investors to help design the long-term model of what SWR and its programs will look like and how they will benefit the community. Six years later the model has proven to be immensely success, achieving financial self-sufficiency and over 70 businesses committed to a GHG reduction target. As a result of this local success, neighbouring communities were interested in bringing the model to their city, which led to the question of if, and how, should Sustainable Waterloo Region scale? In 2012, Miles DePaul of Scaled Purpose took on this question, and similar to 2008 engaged a cross-sectoral group of stakeholders across Ontario to help answer this question. The result was Sustainability CoLab, a national capacity-building nonprofit which is now works with 5 communities in Ontario to replicate the Sustainable Waterloo Region-model and has received over \$800K in seed financing from public, private, and corporate sources.

Currently, Scaled Purpose is working with True North Community Co-op, a regional food hub based in Thunder Bay, Ontario. Scaled Purpose was tasked with the question of building a strategic plan and revenue generation assessment to help transition this nonprofit to a sustainable and profitable organization through diversified revenue streams. As with our approach, our first task was engaging all internal and external stakeholders in identifying where opportunities for scale existed and preparing a report to identify the strengths, weaknesses, opportunities, threats, partnership potential, underserved revenue sources, and low impact activities with high costs. We are now set to prepare a final report focused on developing a workable strategy for two to three new revenue opportunities that are based on community need, desire, and engagement as well as solid business fundamentals like supply & demand.

At our core, we look to work on projects that have far-reaching systemic impact on social and environmental challenges. We're particularly excited about building a relationship with LSPIRG at this crucial juncture as there are few other organizations that have access to such an engaged population of high potential social change agents than a public interest group in a University. We look forward to helping shape the long-term direction while also continuing to engage LSPIRG through the implementation of the plan to ensure effective and sustained impact.



TIMELINE & APPROACH

Phase of Review	Description	Start/End Date
Project Team Consultation	<ul style="list-style-type: none"> Scaled Purpose to meet with project representatives to clarify goals, key activities, and overall purpose of the project. 	Jan 12 th – Jan 16 th , 2015
Internal Analysis	<ul style="list-style-type: none"> Review and analyze existing strategic documents and corresponding reports related to the goals and objectives of LSPIRG. 	Jan 16 th - Jan 30 th , 2015
<p>Methodological Purpose: Ground development of strategy with the tacit knowledge of internal stakeholders</p>	<ul style="list-style-type: none"> Interview internal stakeholders (staff, Board of Directors, volunteers). Assess the current state of the strategic plan from the perspective of internal stakeholders as it relates to: (1) initial intention of plan, (2) long-term vision, (3) mission-creep, (4) external opportunities & threats, (5) internal strengths and weaknesses, and (6) unintended consequences. 	
Stakeholder Engagement Session	<ul style="list-style-type: none"> Develop materials and guest list for an External Working Group (EWG) in January in preparation for a February 7 & 8th session. Host an EWG to ensure the strategic plan is built by the community and for community. EWG will be composed of academic, business, and civil society leaders with primary representation made up of LSPIRG members. This approach offers the added benefit of recruiting community members to LSPIRG membership if desired. 	February 7 – 8, 2015
<p>Methodological Purpose: Leverage tacit knowledge, lend credibility to plan, create community buy-in</p>	<ul style="list-style-type: none"> The facilitated session will explore metrics to be assessed, the perceived business case, desired support services and willingness to pay, and relevant partnership opportunities with community organizations. 	
Assess Stakeholder Feedback	<ul style="list-style-type: none"> Presentation to the LSPIRG Board of Directors of the feedback received from the EWG meeting. A facilitated conversation will be led to guide the LSPIRG Board of Directors through the process of making key strategic direction decisions based on the feedback from the EWG. 	February 9 – 20, 2015
<p>Methodological Purpose: Determine the strategic direction based on EWG feedback</p>	<ul style="list-style-type: none"> Deliver and present the final report to the LSPIRG Board of Directors. Report to detail methodology and findings, the framework and assessment tool, and proposed next steps. Report will also consist of a strategic checklist, timeline, and contingency plans to ensure the strategic plan operates both as a document designed for shared purpose, but also as a living document that can adapt to emerging trends, opportunities, and staff turnover. 	February 23 – March 6, 2015
Strategic Plan Report and Presentation		



<p>Advisory Support</p>	<ul style="list-style-type: none"> • Include alongside the strategic plan an evaluation tool to support the long-term implementation of the plan and to allow LSPIRG to continually ensure programs and strategic decisions are in line with the initial intent of the strategic plan. • Support on the implementation of the recommendations from the report 	<p>March 9 - April 30, 2015</p>
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BUDGET

The RFP identified a three-period payment schedule, with the final installment to be paid before April 30, 2016 upon completion of the contract. It is proposed that the payment schedule take the form of:

1. Awarding of Contract (January 9, 2015): \$2,250.00
2. Acceptance of Final Report and Deliverance of Presentation (March 6, 2015): \$2,250.00

Expense	Hourly Rate	Total
Consultants Time (95 hours)	\$45.00	\$4,275.00
Internal Analysis (20hrs)		
Working Group Preparation (15hrs)		
Working Group Session (15hrs)		
Working Group Assessment & Aggregation (10hrs)		
Preparation of Final Report (35hrs)		
Travel and Misc.	-	\$225.00
	Sub Total	\$4,500
	HST (13%)	\$585.00
	Total	\$5,085.00

SCALED PURPOSE INC.

Scaled Purpose is a consultancy driven to scale the social and environmental impact of organizations by leading the implementation of new business models, and researching opportunities for systems change. We are currently leading projects to advance the local food economy, shift governance models towards Benefit Corporations and Co-operatives, and to develop electric vehicle infrastructure and fleets for a low carbon economy.

Together the principal consultants, Sean Campbell and Miles DePaul, have over 10 years of experience designing and launching nonprofits, conducting strategic plans for nonprofits, managing social innovation incubators across Ontario, developing programming at organizations as diverse as the University of Waterloo and the David Suzuki Foundation. Going forward, we will continue to identify the



moveable challenges in social and environmental innovation and build the capacity of current actors while developing, testing, and co-creating new solutions for systemic social impact. While our experience has historically been in the environmental sector, we have built our competency in the transferable skills of project evaluation, collaboration and collective impact, and strategy planning through our entire body of work including consulting, and educating in social innovation. The models we developed and utilized in the environmental non-profit sector are incredibly valuable across various disciplines. We are continually motivated to work on projects where a small change can have a cascading effect on a larger system of social change.

Our partnership team consists of:

Miles DePaul, BComm, MIPP, Diploma in Social Innovation

Miles has spent the past 6 years driving social innovation in sustainability and entrepreneurship, launching new programs, developing strategic plans, founding organizations, and leading major fundraising and strategic partnerships. In 2012, Miles co-founded [Sustainability CoLab](#), a national network of cities catalyzing results-driven approaches to climate change in the business sector, a Kyoto Protocol for local business communities. Miles led all major business planning activities, partnership development, and fundraising leading to over \$800K in seed funding from corporate, private, and public funds, and has now scaled to five cities across Canada.

Most recently, Miles led the [School for Social Entrepreneurs Ontario](#) (SSEO), a project incubated by the MaRS Centre for Impact Investing, where he led all major partnerships, fundraising, and programming. In his year at SSEO, Miles managed the launch of the second cohort of the Social Entrepreneur Fellowship, secured over \$150K in provincial funding for 2015 programming, and oversaw the development of a new strategic plan under a new Board of Directors he built.

Miles holds a Bachelors of Commerce from McMaster University where he focused his work on nonprofit management and corporate social responsibility. He then received a Masters of International Public Policy at the [Balsillie School of International Affairs](#) at Wilfrid Laurier University. In 2012, Miles received a [Graduate Diploma in Social Innovation](#) at the University of Waterloo where he specialized in urban sustainability, food systems, and clean energy.

Sean Campbell, BBA, MES in Sustainability Management (candidate)

Sean Campbell works at [Greenhouse](#) at the University of Waterloo, a social entrepreneurship & innovation centre, where he leads curriculum design and delivery, and provides direct mentoring for undergraduate social entrepreneurs. Projects launched from the centre are very diverse, ranging the repurposing of end-of-life shipping containers for disaster relief housing, to the implementation of anti-Rape Culture consent education curriculum in Toronto high schools.

In 2012, Sean was a consultant to the David Suzuki Foundation where he supported senior management by conducting a comparative analysis of sub-national approaches to environmental rights in Canada. This research contributed to the launch of the new national [Blue Dot campaign](#) which seeks to implement a constitutional recognition of the right to a health environment. Research and internal consultations were substantiated by cross-sectoral stakeholder interviews with nonprofit and government leaders from across the country.



Sean also works as Policy Engagement Manager at the social enterprise Sustainable Waterloo Region which facilitates voluntary target-setting and reductions of carbon emissions by organizations. Projects have included a [report co-published with the David Suzuki Foundation](#) to review Ontario's energy policies. WWF's Zoe Carron participated as a topic expert panelist at the release event for this report. The current policy work of Sustainable Waterloo Region focuses on the implementation of mandatory energy benchmarking policies and above-code green building standards. These policies are being created using a social change lab process that involves key stakeholders throughout the design, piloting, and implementation phases.

Sean holds a Bachelors of Business Administration from Wilfrid Laurier University where he focused on cause-based marketing. He is currently a candidate for a Master of Environmental Studies in Sustainability Management at the University of Waterloo where he is researching municipal policy tools to drive energy conservation in large organizations.

References:

Full reference contact information will be available upon request.

- 1) [Suppressed for case]
- 2) [Suppressed for case]
- 3) **Sean Geobey, MaRS Solutions Lab**

Sean worked closely with Scaled Purpose on consulting projects for business plan creation, and social finance initiatives, as well as on project evaluation for Sustainable Waterloo Region. Sean is one of the founders of LSPIRG.



Exhibit C

Laurier Students' Public Interest Research Group Strategic Plan Proposal

Purpose

Anthony Piscitelli and Sean Geobey are consultants offering their support to the Laurier Students' Public Interest Research Group (LSPIRG) for the development of their next strategic plan. They will facilitate a planning session and create a planning document which includes an executable strategy for achieving the strategic goals. The document will include a mission, vision and values and strategic directions for the organization. The document will provide the framework for the Board of Directors and staff to develop updated policies, job descriptions, an annual budget and operating plans.

Background

Anthony Piscitelli and Sean Geobey, helped found LSPIRG as undergraduate students at Wilfrid Laurier University. After graduating they both worked as part-time staff with LSPIRG where they helped to develop their first strategic plan. Since graduating they have been involved as Directors, consultants, academic researchers and staff at a number of non-profit and public sector organizations throughout Canada. They have led, developed, implemented and supported strategic planning efforts with multiple organizations and have developed a variety of workshops and facilitation tools to support this work. They will bring this holistic experience to LSPIRG's strategic plan development.

Deliverables

The consultants will provide a final report summarizing the results of a two day strategic planning session. The report will identify:

1. A mission, vision and values for LSPIRG
2. Strategic goals for the organization
3. A summary of the consultation discussions

Proposal

A five-phased approach will be used in developing the LSPIRG Five Year Strategic Plan. These phases are:

- 1. Pre-Session Consultation:** The consultants will meet with the Chair of the Board of Directors and LSPIRG staff to understand the specific strategic plan process priorities of LSPIRG. Once they have a thorough understanding of how the Board of Directors and LSPIRG expect the strategic planning weekend to operate and how the outcomes from the weekend will be used in LSPIRG's operations they will draft a session plan. This consultation will also provide an opportunity to coordinate logistical details (e.g. lunch arrangements, room set up, coordination of an evening social activity etc.)
- 2. Draft Session Plan:** After our pre-session consultation the consultants will develop a draft session plan for consideration by the Chair of the Board of Directors. Approval of this plan will be requested with a turnaround of three days to ensure the project can be completed on schedule. Some specific operational details may be held back from this plan to ensure the Chair can participate in any 'surprise activities'.



3. **Strategic Planning Weekend:** After the specific session plan has been approved we will facilitate a weekend long strategic planning session for up to 45 participants. LSPIRG is responsible to recruit participants for this session, to distribute the pre-planning assignments, to book a venue (with access to computer projector), to provide office material (a full list to be provided during the pre-consultation session) and to handle refreshments (including a mid-morning snack and lunch). LSPIRG is also responsible for hosting an evening social on the Saturday night if that is desirable. We will handle all other session details.
4. **Final Report:** A final written report will be provided by March 31, 2015. This report will include a summary of the strategic planning session, a draft vision, mission and values, and a list of strategic goals.
5. **'After Action' Consultation:** We are both committed to LSPIRG's long term success and as such we are committed to seeing LSPIRG's strategic plan successfully implemented. We will therefore remain available to LSPIRG staff and the Chair of the Board of Directors for three months after the final report is delivered in a limited advisory capacity. This will allow us to support staff as they develop an operational plan to fulfill the goals of the strategic plan.

Implementation Plan

	Time	Timeline (Weeks)						
		1	2	3	4	5	3M	
<i>Initial consultation</i>	1w							
<i>Research plan created and finalized</i>	3w							
<i>Strategic Planning Session</i>	1w							
<i>Final Report & Presentation</i>	2w							
<i>'After action' consultation</i>	-							

Budget

Item	Hours	Total Cost
Pre-Session Preparation	5	\$650
Consultation Session (2 consultants)	32	\$4160
Session Note Taker	18	\$500
Final Report Writing	4	\$520
Total Labour Costs		\$5830
Expenses		
Session Material (Provided by LSPIRG)		\$0
Digital Final Report		\$0
Total Expenses		\$0
Pre-Discount Total Cost		\$5830
Less Discount		-\$1330
Total Cost		\$4500

References



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[Suppressed for case]

The Team

Anthony Piscitelli (Consultant) is currently working as Supervisor Planning & Research with the Waterloo Region Crime Prevention Council and as a Director with Your Neighbourhood Credit Union. He is a certified Municipal Manager Level II and an Accredited Canadian Credit Union Director. He completed a Masters of Political Science and a Bachelor of Arts Honours Political Science and General Global Studies from Wilfrid Laurier University. While an undergraduate student he was extensively involved with Laurier Students' for a Public Interest Research Group where he served a pivotal role in the campaign to create LSPIRG. He served as the organizations first President and personally filed the articles of incorporation. After leaving the Board of Directors he spent two years as part-time staff for the organization.

Sean Geobey (Consultant) is an economic consultant, policy analyst and thought-leader specializing in social innovation and strategy. He has worked with a variety of non-profit, for-profit and educational organizations and is currently Project Manager with the MaRS Solutions Lab. He holds a BA in Political Science and Economics from Wilfrid Laurier University, an MA in Economics from Queen's University and a PhD from the University of Waterloo where is research focused on social finance and social innovation. He is a Research Associate with both the Waterloo Institute for Social Innovation and Resilience and with the Canadian Centre for Policy Alternatives. His workshop design and facilitation skills have been central to his work with a variety of organizations including the Rockefeller Foundation's New Solutions for Youth Employment Lab, the British Columbia Ministry of Health Services, Sustainable Waterloo Region, Innoweave, Social Innovation Generation (SiG) and LSPIRG.

Conclusion

Our team is excited at the opportunity to work with the Laurier Students' Public Interest Research Group. We are proud of the work that LSPIRG has done in our community and hope to continue to contribute to the organization. We would welcome the opportunity to discuss our proposal further at your earliest convenience. Any questions can be addressed to Anthony Piscitelli at [email address] or by phone at [phone number].





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