

Title: The Commons Strategic Planning Consultant
Reports to: Executive Director
Position Type: Contract
Applications due: February 15, 2023
Start Date: Estimated March 2023
Contract Period: Estimated end date September 2023

Purpose

The Commons is a non-profit technology organization that builds information tools and deploys data management services across the environmental sector to amplify the use of environmental data in decision-making. We incorporated as a 501(c)3 in 2016 and have spent the last five years growing a network of funders and stakeholders committed to building the data pipelines necessary to pass information from the hands of practitioners into those of all decision-makers. Though we have a strong sense of purpose in what we can offer the environmental movement, we have reached the point where we are asking ourselves, are we trying to solve too much? We have identified a number of very important questions that we want to explore in order to make our mission and impact as concise and effective as possible. We believe that undergoing a strategic planning process will give us an opportunity to think critically about and answer several questions related to the following themes: *refine* our mission, vision, and goals; *focus* the scope of our product and service offerings; *tailor* our organizational structure to reach strategic goals; and, *establish* a decision-support strategy for fundraising and project selection.

While The Commons has made great headway into the information tools space, we are faced with multiple paths that we could follow in the next five years. We are asking, Through which path can we pursue and provide the biggest value? We believe that now is the time to undergo a guided strategic planning process that will help focus our mission and define both our goals and a systematic strategy for the next three to five years. The purpose of this undertaking is to work with a consultant to guide us through developing a clear mission and strategic plan that will *identify* the nucleus of our work, *define* what success looks like, and provide guidance to ensure we navigate opportunities that keep us connected to our core.

Project Background

The Commons is a 501(c)(3) organization founded in 2016. We are dedicated to supporting the environmental movement with access to high-quality digital services and open tool kits that use data to spark community action and improvement to the environment.

When The Commons started, we had the bold idea that critical data about air and water - the most important commons - should be a public resource for public benefit. We saw how the sector's disconnection from modern software approaches inhibited efforts to achieve the collective mission of safeguarding our nation's natural resources. We envisioned a future where machine-readable data, analysis, and powerful applications supported leaders in this sector to catalyze faster improvements to our air and water. A world where environmental attorneys could expedite and win enforcement cases with strong data-based evidence. A future where the value of reporting spatially explicit information detailing where restoration has occurred on the landscape, empowered funders to have a better sense of where gaps need to be filled in restoration efforts and how grantees were performing based on their investment portfolio. And a future where small watershed organizations could impactfully participate in local, regional, and federal efforts while operating within their own means. We took a calculated risk to build an organization that was dedicated to arming the environmental movement with information tools and a new appreciation for integrated digital infrastructure systems that restore protect and improve our natural world. And in our first five years of operation, we tackled everything that we envisioned.

Our flagship offerings are two software-as-a-service systems. **FieldDoc** helps funders and restoration professionals model and track the impact of restoration work on reducing pollution and greenhouse gas emissions and furthering strategic investment. More than 90 programs and 600 restoration practitioners track their efforts in FieldDoc. **Water Reporter** digitizes water quality monitoring data, from photo observations to sampling monitoring programs, and turns data into accessible mapping applications. Over 180 organizations have added subscriptions to the service. Data has been used to get rivers listed as impaired, hold state agencies accountable for enforcing pollution permit exceedances, and provided previously unthinkable data sovereignty while expanding data sharing for small watershed organizations.

We complement these products with additional service-oriented consulting offerings. Our **Digital Services** program provides consulting support from concept through the creation of custom applications and has resulted in products like OilandGasWatch.org for the Environmental Integrity Project, Maryland Violation Tracker for Chesapeake Legal Alliance, LNG Tracker for Natural Resources Defense Counsel, Lake Erie Volunteer Monitoring Network, and a public-private data model integration for the California Water Boards, and many more. Finally, the **Water Data Collaborative** was added to our portfolio in 2021. The WDC's mission, overseen by a Steering Committee and separate charter, is to grow and maintain an inclusive community of trained and qualified community water scientists who employ the best available practices and technologies to provide data that enable the protection and restoration of our nation's waterways.

Our current scope of offerings and network of engaged stakeholders is undeniably broad for the size of our team and the depth of our budget. The Commons' leadership recognizes that our breadth needs strategic clarity to re-focus and prioritize our work around a clearly defined mission and goals. We believe that with the refined direction we can continue to build an organization that achieves the information-sharing capacity we envision across the environmental sector.

We anticipate that the outcomes of the strategic planning process could significantly alter our day-to-day operations and how the clients that we serve directly. Through the strategic planning process, we hope to confront the challenge of selecting priorities while still fostering buy-in to a narrower suite of offerings by our key constituents.

Diversity, Equity, Inclusion, and Justice

The Commons is committed to being an equitable and inclusive organization and strives to incorporate equity throughout all of our work and outcomes. While we are not an exclusively environmental justice-focused organization, diversity, equity, inclusion, and justice will be incorporated across our work in our new strategic plan. DEIJ will be a critical strategy in what we do, who we serve, and how we operate. The selected strategic planning consultant may be asked to coordinate with ongoing equity work in an effort to ensure that our strategic plan reflects our values and goals.

Requested Scope of Services

We intend for this strategic planning process to take place in three phases, with the work in phase one informing phases two and three. We anticipate a need to take an agile and adaptive approach to the process. We welcome proposals with a scope of work that covers one or more of the phases.

Phase 1: Develop a unified and straightforward vision and mission for The Commons

The linchpin to our strategic planning process will be to help The Commons refine and align on a clear vision and mission for what we are aiming to achieve, the value it brings to the sector, and the goals we are working towards. In phase one, the consultant will take a deep look at our program areas, product portfolio, market conditions, and organizational structure to connect the dots between mission and programs. Based on findings, align staff and board and facilitate consensus around a clear mission and vision and core tenants to have the biggest impact on the constituency that is being served. Some key questions we have identified to guide phase one are:

- **What is The Commons' shared vision and mission?**
 - What elements of our skillsets and core offerings have the greatest potential to support our stakeholders and further our mission?
 - What are our strategic goals and what is our approach to prioritization? Both for The Commons more broadly and for each of our offerings?
 - How do our products and offerings further our vision and mission? How are our product offerings positioned to impact relevant sectors?
 - Set key progress indicators for our product offerings that relate to the core mission of our organization.
 - Who are the prime users of The Commons' products? Are the users the same as our stakeholders and funders?

- **What can we bring to the table that no one else can?**
 - What is our unique value proposition to the world?
 - What other organizations are working in this space and what differentiates our team?
- **How do we define success?**
 - Do any gaps exist in our target markets, such as technical acumen, that can derail our goals?
 - What are our short-, medium-, and long-term metrics of success? How is success defined and measured within each product or service and how do these contribute to The Commons' overall success?

Phase 2: Develop a strategic plan to achieve our shared mission and vision

Once we have a consensus on our shared vision, mission, and goals, we want to focus attention on developing a roadmap for shoring up our products, services, and operations from where we are today to where we want to be in the next three to five years. The consultant will spearhead the effort to organize thoughts and approaches to focus and align offerings and programmatic goals with the mission, offerings, and organizational capacity.

The overarching question we want to answer in this phase is, what should the portfolio of offerings be to accomplish our vision and achieve the successes identified in phase 1?

Some of the themes and key questions that we identified to guide this second phase of the process include:

- **Focus and scope**
 - What elements of our existing and future products get us the closest to our mission?
 - Can we achieve our mission and serve our stakeholders through a singular backend service?
 - What are the required skills and support that users will need to have in order to use our products directly? How can we address gaps that may preclude direct use and use these as an opportunity to solicit grants or service based-contracts?
- **Collaboration**
 - Who are our direct users and end users?
 - How do we facilitate the use of our data management platforms to benefit target audiences?
 - Should we and how do we exploit policy and stakeholder goals to increase adoption of our data management platforms for vertical use from data generator through end data user?
 - What expertise, capacity, and resources do we want to maintain 'in-house' versus outsourcing to partners and collaborators?

- **Structure and culture**
 - How can The Commons create an impact in the sector beyond one-on-one work to shape data management and integrated software system development throughout the sector?
 - What is the ideal team size and what in-house roles are needed to meet our goals?
 - How do we create a workplace that truly balances work with life but also results in a stable financial outlook for the organization?
 - How can we attract (and compensate) experienced, capable people with expertise in technology that want to use their skills for positive outcomes?
- **Funding**
 - Can we move beyond a funding model of pitching feature improvements and leverage support for the existing value of our platforms?
 - Can we define our financial goals beyond covering staffing costs?
 - Can we identify the costs necessary to maintain each of our software platforms and then build funding models with diversified revenue streams that allow us to offer subsidized use of our software-as-a-service subscriptions?
 - Is there a business model we can create that melds software and non-profit budgeting strategies to effectively meet our financial goals?
 - Who can we engage from the private and philanthropic sectors to support meaningful expansion and stability of our core product offerings in support of environmental stakeholders?

We recognize that our list of questions in phase two includes some areas that can't be answered right away. We are open to working with the consultant(s) to prioritize, refine, and adjust this list to identify which questions will inform our strategic plan and which may distract from our goals.

Phase 3: Create a Decision-Support Tool

After the creation of a strategic plan in phase 2, we want to create a decision-support tool that we can return to while implementing the strategic plan. We want this tool to help us answer the big questions of how to portion our time and energy to stay focused on the funding and feature development that will guide us through addressing a recurring challenge: How do we stay innovative and flexible while also staying focused on our mission and medium and long-term goals?

- **Focus and scope**
 - What are the criteria for building product development roadmaps?
 - What are the criteria for taking on digital service projects?
- **Collaboration**
 - Who are we willing to collaborate with?
 - How can we build partnerships that promote the use of our platforms as a value-add to our in-house resources, not a drain on them?
- **Structure and Culture**

- As we identify clients, stakeholders, and staff, how do we determine “good fits” that respect or represent our culture?
- **Funding**
 - How to prioritize pursuing various funding strategies?

Outcomes and Deliverables

The following section describes our ideal suite of outcomes and deliverables throughout this process. We also look for guidance from you as the consultant to curate this list to help set us up for success through this process and in the years to come:

Phase 1:

Activities and Deliverables:

- Facilitate The Commons staff and board through at least 1-2 workshops and/or surveys to solicit feedback that crafts the refined vision and mission.
- Complete a landscape analysis to identify other entities working in this space and identify The Commons’ differentiating factors. A working document should summarize the findings.
- Conduct a deep-dive into the relevancy of The Commons’ current products and services, as well as their alignment with the new mission and vision. A working document should describe the findings of previous relevance and proposed alignment to the refined mission and vision.
- Craft the shared vision, mission, and goals for The Commons as a whole. Working with Commons leadership, identify strategic goals as they relate to offerings and operations and how they each feed into the overarching goal.
- Develop a portfolio of services that remains within The Commons offerings scaled to the current budget and capacity.
- With Commons leadership, identify the short, medium, and long-term metrics of success for The Commons and each of its product offerings.

Outcomes:

- Team acceptance and adoption of refined mission and vision.
- Team alignment on strategic goals and metrics of success for The Commons as an entity.
- Team willingness to transform the mission, vision, goals, and product offerings.

Phase 2

Activities and Deliverables

- A strategic planning document that includes The Commons’ mission, vision, and definition of success. The 3-5 year plan should articulate how to achieve the successes and goals that we defined in phase 1.
 - The Commons leadership team will be instrumental in informing the content of the strategic plan, however, we anticipate leaning on the consultant(s) to understand our mission and vision enough to connect our dots and translate our vision into achievable objectives.

- A final presentation to the entire board and staff at The Commons that summarizes the key outcomes of the strategic planning process, including the proposed pathway for achieving success.
- Budget assessment and prospectus to present to third-party foundations for support of the new three to five-year strategic plan.

Outcomes

- A strategic plan that includes actionable operational guidelines on the systems, processes, and structure for The Commons to be successful, function as a fully-integrated team, and always operate in a way that aligns with our vision, mission, and goals.

Phase 3

Activities and Deliverables

- Create a complementary document that provides a decision-support matrix for leadership to implement the strategic plan. The tool should assist leadership in staying focused and aligned with the mission throughout operations and offerings implementation while meeting financial goals.

Outcomes

- A support tool to enhance allegiance to the strategic plan throughout the three to five-year period.

Consultant qualifications

Because of the integrated phases of this strategic planning process, we are hoping to identify a single consultant or consulting team to complete two or more of the phases. We do not expect any single consultant to meet 100% of these qualifications and encourage you to submit a proposal if this work looks exciting to you.

1. Experience in facilitation and consensus building. We are for you to be able to ask questions that spark conversations, listen to the perspectives shared, and connect the dots that lead to both actionable outcomes and consensus. We believe that this skill is critical to aligning on a unified vision and defining our understanding of success throughout all aspects of The Commons.
2. Experience with strategic planning in small organizations with limited depth of staff or financial resources.
3. Experience establishing and measuring metrics for success at operational and programmatic levels.
4. Excellent written and verbal communication skills that can help facilitate better participation during the iterative process but also create final concise and easily digestible materials of the activity outcomes.
5. Expertise and experience in developing a strategic plan that includes clear milestones and activities for achieving the vision.
6. Understands the nuances of software development, data management, data governance, and API integrations.

7. Possesses a deep understanding of environmental issues and policies, and how stakeholders throughout the sector interact with the Clean Water Act and Clean Air Act.
8. Expertise and experience in building strategies that recognize the intersection of operations, budgeting, staffing, and offerings when building strategies and goals.

Process, Timeline, and Submission Instructions

We request that you submit the following materials for consideration:

- A two to four-page proposal for how you will complete each phase of the project. We recommend including the following information:
 - **Approach** - What will you do? Detail your proposed approach, activities, timeline, and deliverables for each phase. Please use the RFQ as a guideline, but we recognize that you have done this process more than us, and we expect you to suggest alternatives where you see fit to meet your approach.
 - **Communications and Engagement** - What is your anticipated communication strategy? How can we support you to keep everyone adequately informed and progressing throughout the project period?
 - **Budget** - What will your costs be to conduct each phase? Please include both an ideal budget and a short narrative.
 - **Team** - Who will be working on this project? If relevant, Who will be the team lead? What are you(r) team(s) expertise and skills relevant to this project?
- Please include biographies or resumes for all people who will be working on this project.
- Please share one to three relevant work samples and contact information for 1-2 references who we can connect with about your previous work.

Additional Resources

We invite you to learn more about our organization by visiting The Commons' [website](#). You can find our product offerings, blog, annual reports, and financials on the website.

The completed proposal package should be emailed to John Dawes, Executive Director of The Commons at dawes@ourcommoncode.org by February 15, 2023, for consideration. Proposals may be considered on a rolling basis. More information on specific goals and objectives can be made available upon request prior to submitting a final scope of work.