

Request for Proposals: Five-Year Strategic Planning Engagement

Overview

The Anchor School (TAS) invites proposals from qualified organizations or consulting teams to facilitate the development of a five-year strategic plan that will guide the school through its next charter term.

Our school is scheduled for charter review and anticipates renewal in the spring of 2028, and we view this renewal as an important opportunity to reflect on our progress, engage our community in envisioning our future, and establish a clear strategic direction for the next five years. The selected partner will work closely with school leadership and members of our village to develop a compelling, actionable strategic plan that reflects our mission, values, aspirations, and the requirements of the State Charter Schools Commission.

We are seeking a partner who can help us move beyond a traditional strategic planning process to create a shared vision for the school's future – one that tells a compelling story about who we are, where we are going, and how we will get there.

Scope of Engagement

The selected organization will partner with The Anchor School from approximately January through June of 2027 to lead a comprehensive strategic planning process. While we welcome proposals that recommend a different or refined approach, we anticipate the engagement will include:

- An initial assessment of the school's current position, accomplishments, opportunities, and challenges.
- Review of relevant school, organizational, academic, financial, and operational data.
- Meaningful engagement with a broad range of stakeholders, which may include TAS scholars, families, faculty and staff, school leadership, board members, former families, and community partners.
- Facilitation of conversations and activities that build shared understanding and surface diverse perspectives.
- Development or refinement of a compelling vision for the school's next five years.
- Identification of a focused set of strategic priorities and goals.
- Development of measurable objectives, strategies, and indicators of progress.
- Alignment of the strategic plan with the school's mission and values and with applicable State Charter Schools Commission expectations and charter renewal requirements.
- Facilitation of leadership and board discussions necessary to build ownership of the plan.
- Development of a final strategic plan that is clear, accessible, goal-driven, and useful as a framework for decision-making and accountability.

The final product should be more than a written document. It should provide the school community with a shared roadmap for the next five-year charter term, including a clear understanding of priorities, desired outcomes, measures of success, and the work required to achieve them.

Ideal Partner

We are particularly interested in organizations that demonstrate the following qualities and experience:

Compelling Storytelling

The ability to translate data, stakeholder perspectives, and organizational aspirations into a compelling narrative about the school's future. We want our strategic plan to communicate not only what we intend to accomplish, but why it matters.

Deep Stakeholder Engagement

A demonstrated commitment to authentic and inclusive stakeholder involvement. Our school was built through a co-design approach that included a plurality of voices in our seed stage. We expect that ethos to continue. We value partners who know how to design engagement processes that generate meaningful input, create shared ownership, and ensure that multiple perspectives inform the final plan.

Clear, Goal-Driven Strategic Planning

A track record of developing focused strategic plans with clear priorities, measurable goals, defined outcomes, and practical strategies for implementation. We are seeking a partner who can help us make strategic choices rather than simply generate a comprehensive list of initiatives.

Experience with Purpose-Driven Organizations

Experience working with schools, charter schools, nonprofits, or other mission-driven organizations is strongly preferred. The ideal partner understands how organizational culture, mission, community, governance, and impact intersect in purpose-driven work.

Understanding of Charter Accountability

Familiarity with the charter school landscape and an ability to thoughtfully incorporate the requirements and expectations of the State Charter Schools Commission into the planning process. The strategic plan should position the school to enter its next charter term with clarity, focus, and a strong foundation for accountability.

Desired Deliverables

Proposals should describe the deliverables the consultant or organization recommends. At minimum, we anticipate receiving:

1. A summary of the strategic planning process and stakeholder engagement findings.
2. A compelling five-year strategic framework or narrative which clearly incorporates our past, present, and future.
3. Clearly articulated strategic priorities.
4. Measurable goals and objectives for each priority.
5. Recommended strategies and/or key initiatives.
6. Measures or indicators that will allow the school to monitor progress.
7. A final strategic plan suitable for use by the school's leadership, board, and broader community.
8. Recommendations for implementation, monitoring, and ongoing accountability.

Proposed Timeline

We anticipate the following general timeline:

- September 1, 2026: RFP released
- October 16, 2026: Proposals due
- November 2026: Finalists invited to participate in interviews
- December 2026: Consultant/organization selected and engagement finalized
- January–June 2027: Strategic planning engagement
- Spring 2028: Charter renewal

We welcome proposals that recommend adjustments to this timeline if they would strengthen the quality or effectiveness of the planning process.

Proposal Requirements

Interested organizations should submit a proposal that includes:

- Organizational overview and qualifications.
- Relevant experience with strategic planning, particularly for schools, charter schools, nonprofits, or other purpose-driven organizations.
- Examples of comparable engagements and, where available, references or sample work.
- Proposed approach and methodology, including the approach to stakeholder engagement.
- Proposed project timeline and major milestones.
- Key personnel who would participate in the engagement and their roles.
- Approach to incorporating State Charter Schools Commission requirements and charter renewal considerations.
- Proposed deliverables.
- Fee structure and estimated total cost, including any anticipated expenses.
- Three professional references for comparable work.
- Any assumptions, requested school support, or additional information needed to successfully complete the engagement.

Evaluation Criteria

Proposals will be evaluated using the following five criteria, with a total possible score of 100 points:

Category	Weight	Evaluation Considerations
1. Strategic Planning Approach & Vision	25 points	Strength and clarity of the proposed strategic planning methodology; ability to translate the school's mission, values, data, and aspirations into a focused five-year vision; and demonstrated ability to develop clear, measurable priorities, goals, and strategies.
2. Stakeholder Engagement & Storytelling	25 points	Quality and depth of the proposed approach to engaging students, families, faculty and staff, leadership, board members, and other stakeholders; ability to build shared ownership; and demonstrated skill in synthesizing diverse perspectives into a compelling story about the school's future.
3. Relevant Experience & Expertise	20 points	Demonstrated experience leading strategic planning for schools, charter schools, nonprofits, or other purpose-driven organizations; qualifications of the proposed team; and evidence of successful comparable engagements.
4. Charter Renewal & Accountability Alignment	15 points	Understanding of the charter school environment and the requirements and expectations of the State Charter Schools Commission; ability to align the strategic plan with charter renewal considerations, accountability requirements, and long-term organizational sustainability.
5. Project Plan, Deliverables & Value	15 points	Feasibility and quality of the proposed timeline, milestones, and deliverables; clarity of roles and responsibilities; responsiveness to the school's needs; and overall value relative to the proposed fee and resources required.
Total	100 points	

The Anchor School is a village of educators, families, and community members that partners with 6th through 12th grade students who are developing the knowledge, skills, and confidence they need to thrive in school and beyond.

Submission

Proposals should be submitted to Josh Pinto Taylor, Executive Director (joshpintotaylor@anchorschool.org) no later than 11:59:59 p.m. on October 16, 2026. Questions regarding this RFP may be directed to joshpintotaylor@anchorschool.org by October 9, 2026.

The Anchor School reserves the right to modify the RFP timeline, request additional information, interview one or more respondents, negotiate with selected respondents, or decline to select a proposal.

Our Goal

At the conclusion of this engagement, we want to have more than a five-year plan. We want a shared vision for our next chapter – grounded in our mission, informed by our village, responsive to our accountability commitments, and translated into a *small* number of meaningful priorities that will guide our decisions and measure our progress through the next charter term.

We look forward to partnering with an organization that can help us tell that story and turn it into action.