

OREGON BLACK PIONEERS

Oregon's only statewide African American historical society

REQUEST FOR PROPOSAL

Facilitation of a Board & Staff Strategic Planning Experience

A half-day session that turns our 2025 Business Plan and 2026 Master Plan into a shared direction — and brings board and staff closer together as we move from itinerant stewardship to permanent anchor.

Issued by	Oregon Black Pioneers (OBP)
RFP issue date	Jul 30, 2026
Questions due	August 7, 2026
Proposals due	August 14 by 5:00 PM PT
Session date	September 19, 2026 — 5 hours (half day)
Location	Portland metro — off-site venue (TBD)
Primary contact	LC Miller, Board President — lc@oregonblackpioneers.org

Confidential — for invited facilitators

1. Overview & Purpose

Oregon Black Pioneers (OBP) is seeking an experienced facilitator to design and lead a five-hour board and staff strategic planning session on September 19, 2026. This session comes at a defining moment for the organization. In April 2026 OBP completed its Master Plan 2026, a roadmap for moving from more than thirty years of “itinerant stewardship” toward a permanent, brick-and-mortar home. We now need our board and staff to align on how we implement that plan and prepare for the November Annual Board Meeting.

We want more than a working meeting. We are looking for a facilitated **experience** that helps 13 board members and staff step out of day-to-day operations, connect as one team, and leave with a clear, shared sense of direction they feel genuine ownership over. The ideal facilitator will deliver **two intertwined outcomes**: (1) real strategic alignment we can act on, and (2) an energizing, memorable day that strengthens the board–staff relationship at a pivotal time.

What makes this session different

OBP has done strong strategic planning before — full-day board and staff planning session in 2021 and 2024, and a half-day investment-priorities retreat in 2025 — each of which gathered input up front and produced a written plan. Those sessions were effective at *capturing feedback and generating outputs*, but they were working meetings, not experiences. This engagement asks for both: the same rigor **and** a deliberately designed experience that participants feel, remember, and leave energized by. Our strategic direction is already largely set by the Business and Master Plan, so the work of this day is **alignment, ownership, energy, and cohesion** — not another round of diagnosis or a survey-and-readout. We are explicitly hiring for facilitation and experience design, not for another strategic assessment.

2. About Oregon Black Pioneers

Founded in 1993, OBP is Oregon's only historical society devoted to preserving and presenting the experiences of African Americans across the state. For more than thirty years we have stewarded Oregon's Black history through traveling exhibitions, digital archives, walking tours, publications, and community programming — all without a permanent home. Recently OBP transitioned from a volunteer-led initiative to a professionally staffed institution, attracting major grant support and building a growing base of earned revenue.

Mission	To research, recognize, and commemorate the history and heritage of African Americans in Oregon.
Vision	A thriving Black community across Oregon, connected and inspired by the examples of our African American ancestors.
The moment	Positioned to pursue a permanent home in Portland's historic Albina district — building institutional capacity and alignment before launching a capital campaign.

3. Strategic Context for This Session

The Master Plan 2026 frames OBP's future institution around four equal pillars — an Education Center, a Community Hub, a Stewardship Backbone, and an Orientation/Trailhead for statewide heritage tourism —

with a guiding principle of “capacity before capital.” Our current Business Plan sets five strategic priorities that this session should help advance:

- **Deepen community impact** — place Black Oregonians, especially youth and families, at the center of our work.
- **Build organizational capacity** — expand staffing, strengthen HR and financial systems, and adopt evaluation tools.
- **Diversify revenue** — grow individual giving, earned income, and multi-year philanthropic support.
- **Maintain statewide reach** — deepen partnerships with schools, libraries, and cultural institutions beyond Portland.
- **Advance the museum roadmap** — move the permanent-home vision forward through phased planning and coalition-building.

These priorities are not new. Across three prior planning cycles — the 2021–2023 and 2024–2026 strategic plans and the March 2025 retreat — the same throughline has held: a permanent museum, financial health and revenue diversification, and board development. The direction is well established and well documented. What the September session needs to produce is not a re-diagnosis but shared focus, clear ownership, and momentum into the November Annual Board Meeting.

The Master Plan also names readiness gaps to close before a capital campaign — notably executive bandwidth and governance architecture (a formalized board contract clarifying “give/get” expectations and embedding community representation structurally). The facilitator does not need deep museum expertise, but should be comfortable helping a board and staff make focused decisions inside this context. The selected facilitator will receive our background materials, including the Master Plan 2026 summary, the current Business Plan, the 2024–2026 and 2021–2023 strategic plans, and the March 2025 retreat recap.

4. Objectives

Because the strategic direction is already set, these objectives lean toward alignment, ownership, and cohesion rather than discovery. By the close of the session, we expect to have:

- A shared, plain-language understanding of where OBP stands today and the direction set by the Business and Master Plan.
- Alignment on the 3–5 priorities the board and staff will focus on over the next 24–36 months, including the readiness work that must precede a capital campaign.
- Draft goals, owners, and success measures for each priority, oriented toward the November Annual Board Meeting.
- Clarity on board and staff roles and immediate next steps coming out of the day.
- A stronger, more connected board-and-staff team that leaves energized and re-committed to the mission.

5. The Experience We're After

Alongside the strategy work, we care deeply about how the day feels. Our March 2025 retreat used interactive, hands-on methods — visioning, a landscape scan and SWOT, and a live funding-allocation exercise — and that participatory style worked well for our group. We are looking for a facilitator who can build the following into the design:

Venue & hospitality

An intentional, comfortable off-site setting with thoughtful food and hospitality that signals this day matters. We welcome facilitator recommendations on venue and flow; OBP will contract the venue directly.

Facilitated energy

Interactive, well-paced methods rather than lecture-and-slides — icebreakers, energizers, small-group work, and visual/creative exercises that keep 13 people engaged across five hours and intentionally draw out quieter voices from both board and staff.

Team bonding

Deliberate moments of connection and reflection: honoring OBP's 30+ year legacy, celebrating recent wins, building trust across board and staff, and closing on a shared commitment to the road ahead.

6. Participants & Logistics

Attendees	13 total — full board and staff, including Executive Director Zachary Stocks
Session length	5 hours (half day), including breaks and a working meal
Timing	September 19, 2026
Format	In-person, off-site, Portland metro
Facilitator role	Design, facilitation, materials, and a post-session summary of outputs
Planning partners	LC Miller (Board President) and Zachary Stocks (Executive Director)

7. Illustrative Flow (Facilitator May Reshape)

The agenda below is directional, not prescriptive. We want the facilitator's expertise to shape the actual design.

TIME	SEGMENT	EXPERIENCE / METHOD
0:00	Welcome, grounding & connection	Hospitality, opening reflection honoring OBP's legacy
0:30	Where we are today	Guided reflection on the Master Plan 2026 & current state
1:15	What matters most, 2027–2029	Small-group work, dot-voting on priorities
2:00	Break + informal connection	Refreshments, unstructured time
2:15	Setting focus & readiness priorities	Facilitated prioritization, live capture
3:15	Goals, owners & measures	Board/staff breakouts, share-back
4:15	Commitments & next steps	Round-robin, path to November Annual Meeting
4:45	Celebrate & close	Recognition of wins, group photo

8. Scope of Work

In scope

- Pre-session discovery: 1–2 planning calls with the Board President and Executive Director, and review of the background materials listed above.
- Custom agenda and facilitation design tailored to OBP's objectives, strategic context, and the experience goals in Section 5.
- All facilitation materials (worksheets, prompts, visuals, supplies).
- On-site facilitation of the full 5-hour session.
- A written summary of outputs, decisions, owners, and next steps within 3-4 business days after the session.

Out of scope

- Venue rental and catering (contracted and paid directly by OBP; facilitator input welcome).
- Ongoing implementation, coaching, or multi-session engagements — though proposers may note optional add-ons separately.

9. Proposal Requirements

Please keep proposals concise (3 pages or fewer, plus optional appendices) and include:

- A brief statement of your approach and facilitation philosophy — especially how you balance strategic rigor with experience and energy.
- How your design goes **beyond gathering input and producing a report** — specifically, how you create an experience participants feel and remember, not a survey-and-readout.
- Your proposed design or methodology for a session like this.
- Relevant experience with nonprofit boards and mixed board-and-staff groups; experience with culturally specific, mission-driven, or historically grounded organizations is a plus.
- A detailed fee and cost breakdown, including any optional add-ons.
- Facilitator bio(s) and confirmation of September 2026 availability.

10. Budget

OBP has allocated a budget in the **\$10,000+ range** for the facilitation engagement (design, materials, facilitation, and post-session summary). Venue and catering are budgeted separately. Please present your fees transparently and flag anything that would materially change the experience at different investment levels.

11. Evaluation Criteria

Approach & experience design (30%)	Ability to deliver both strategic outcomes and a memorable, energizing experience
Relevant experience (25%)	Track record with nonprofit boards, mixed board/staff groups, and mission-driven organizations
Facilitation skill & fit (25%)	Style, presence, and cultural fit with OBP and the communities we serve
Value & cost (20%)	Clarity and reasonableness of fees relative to scope

12. Timeline

RFP issued	Jul 30, 2026
Questions due	Aug 7, 2026
Proposals due	Aug 14, 5:00 PM PT
Interviews (if needed)	September 1-5
Facilitator selected	Aug 21
Session held	September 19, 2026

13. Submission Instructions

Submit proposals as a single PDF to **LC Miller, Board President, at lc@oregonblackpioneers** by the deadline above. Direct any questions to the same address. OBP reserves the right to request clarifications, interview finalists, or decline all proposals.

Thank you for your interest in partnering with Oregon Black Pioneers. We're looking for a day that moves our key plans forward and brings our board and staff closer together as we build a permanent home for Oregon's Black history.