

# Request for Proposals

## Strategic Planning with Objectives and Key Results

### The Michael J. Fox Foundation for Parkinson's Research

Proposals Due: January 6, 2023

#### Engagement Summary

The Michael J. Fox Foundation for Parkinson's Research (MJFF) is seeking proposals for facilitation of a strategic planning refresh based on the Objectives and Key Results (OKR) framework. MJFF has grown rapidly in recent years, and we envision this process contributing to sustained success by evolving our multi-year operating plan and setting “north star” OKRs for the next 3-5 years.

**The key question we seek to answer: Where do we focus as an organization, and how should we quantify our incremental impact in those areas between now and curing Parkinson's disease?** The biggest challenge for MJFF in any strategic planning engagement is the long-term, high-risk/low-return nature of our work. Science is expensive, and it can take years for research investments to pay off.

Desired outcomes include improved focus on key organizational objectives to support decision-making, co-creation and alignment on measurable key results showing intermediate progress between now and a cure for Parkinson's disease, and improved communication and presentation of our strategic vision to a large and distributed base of internal and external stakeholders. This engagement will take place during the first half of 2023.

#### About the Foundation

MJFF was founded in 2000 with one clear objective: accelerating meaningful therapeutic advances and, ultimately, a cure for PD. The Foundation applies extraordinary scientific, business and media assets to this singular focus—thus creating a unique and dynamic organization. Since inception, MJFF has quickly grown into the largest nonprofit funder of Parkinson's disease research, having funded over \$1.5 billion in research projects in both academic and industry labs worldwide.

Core to our philosophy is how we think of our capital and its risk profile relative to other stakeholders in the drug development pipeline. We work aggressively to de-risk various therapeutic strategies and tools in the hopes of building a robust pipeline of new treatments for patients. In order to achieve our mission of finding a cure for PD, it is critical that we engage with,

and bring together, members of the PD community including researchers, physicians, health professionals and most important, people with Parkinson's and their families.

We believe that to find a cure for PD as quickly as possible, our capital needs to push research forward today—we therefore deliberately hold no endowment or excessive reserves. We instead seek to deploy funds raised as quickly and wisely as possible. MJFF raises over \$300 million annually. Today, the Foundation has approximately 250 full-time employees.

## Project Background

**This is a "sustain success" engagement, not a "blue sky" or "turnaround" effort.** Over the past 20 years, MJFF has conducted a series of limited strategic planning initiatives, largely based on internal perspectives. The most recent long-range planning effort occurred in 2020. While these plans have served MJFF well, several factors are driving this update:

1. **New (returning) CEO.** Debi Brooks, co-founder and the first CEO of MJFF, stepped back into the CEO role in May 2021. Dr. Todd Sherer, the previous CEO, remains on staff as Chief Mission Officer, now reporting to Debi. Of note, Debi Brooks has been on staff in leadership positions continuously since 2000, and prior to resuming the CEO role, she served as Executive Vice Chair and led MJFF's fundraising, marketing, and communications functions.
2. **Revised organizational structure.** In late 2021, MJFF formalized an organizational and operational structure that created five Business Units housing 20+ Departments. Staff assigned to these departments work on ~80 operational programs that advance various organizational objectives.
3. **Aligning Science Across Parkinson's (ASAP).** Awarded in late 2019, ASAP is a multi-year expansion of a partnership with our largest donor, which funds a program focused on a range of critical basic research on Parkinson's disease. This expansion led to MJFF doubling in size between 2019 and 2021.
4. **Audience and Revenue Growth.** Entering the final year of a three-year plan, our fundraising group, led by a newly promoted Chief Development Officer, has seen success as it has worked to become more donor-centric and expand revenue sources. In parallel, our marketing group, led by a recently promoted Chief Marketing Officer, has made significant investments to grow our audience, which we intend to engage in both programmatic and fundraising calls to action. We aim to understand the lifetime value of these newly acquired audience members while continuing to grow our fundraising revenues and meet programmatic commitments.
5. **A Growing, Hybrid Workforce.** Since 2020, MJFF has almost doubled our number of staff members. 2/3 of our staff have joined in the last 2 years, and nearly 1/3 of our workforce now work exclusively remotely. This creates many opportunities, but also surfaces new

challenges for how we communicate our strategic vision to ensure staff understand how they individually and collectively contribute to advancing our mission.

As MJFF grows and our business becomes more complex, it is critical that we simplify our approach to measuring impact and communicating our vision for a world without Parkinson's disease. **MJFF now seeks to better articulate measurable milestones on the way to curing PD and to align on the enterprise values, systems, and processes needed to implement our work effectively and efficiently.**

For these reasons, we are seeking a facilitated strategic planning process that is rooted in the OKR framework. OKRs are used by organizations and individuals for collaboratively setting ambitious goals, tracking progress, and aligning action with an organization's strategy to achieve measurable results. OKRs create an analytical basis for decision making and help focus attention on what matters most. MJFF's current operational planning process is loosely based on OKRs, however the framework has yet not been fully embraced. This strategic planning engagement should build on and enhance MJFF's current annual operational planning process.

The engagement should also leverage extensive internal experience and stakeholder perspectives to align on a set of north star OKRs, which will be cascaded during operational planning and used to measure progress at various levels within the organization.

## Scope of Work

A successful strategic planning process will produce:

1. **Top-level north star OKRs** that articulate long-term success (3-5 years) for the Foundation as well as key milestones along the way to curing PD. These north star OKRs will guide alignment and clarify accountability throughout the organization across business units, departments, programs, and individuals.
2. **A flexible and adaptive framework** and recommendations for tools/platforms that will guide our work and decision-making into future years.
3. **A succinct presentation** of our 3-5 year strategic plan for use with managers and staff.
4. **A key-findings report** that addresses the following questions for MJFF leadership:
  - Where do we tighten our focus as an organization and quantify our incremental impact in those areas between now and curing PD?
  - How do we decide what to prioritize and what ideas to defer?
  - How does MJFF take advantage of the opportunities from growth, while mitigating the threats?
  - How do we synthesize and communicate our strategic plan to internal and external stakeholders?

- What is the optimal organizational structure for MJFF to implement & sustain an org-wide OKR framework and process?

## Budget

MJFF is targeting \$50,000 for this engagement. As a charitable organization, MJFF is very focused on being good stewards of our donors' contributions and so requests nonprofit rates.

## Timeline

The strategic planning process is expected to last three to six months, beginning in early 2023.

## Required Experience and Qualifications

The ideal firm or consultant will meet the following requirements:

- Expertise with the OKR framework
- A dedicated team
- Experience working with organizations where mission impact has a long runway

## Evaluation and Scoring

Submissions will be evaluated based on the following criteria:

- Prior successes
- Related experience
- Price
- Team makeup
- Capabilities

## Proposal Requirements

Proposals should include the following elements:

### **Consultant/firm information, including:**

- Name(s) and bio(s) of consultant or principal and relevant staff
- Contact information including physical address
- Track record of similar projects completed

### **A brief narrative, not to exceed four pages, which details your:**

- Interest: Describe why this opportunity is of interest to you, your team, or your firm.
- Qualifications/Experience: Describe how you, your team, and/or firm are positioned to fully complete the scope of work and achieve the desired outcomes.
- Approach: Describe your proposed approach to the project as outlined in the scope of work, including timeline and the deliverables you will provide.

- Team: Identify the engagement lead, key personnel, any sub-consultants, and project manager (if different from the engagement lead).
- Rate: Include costs of engagement, itemizing wherever possible.

### Deadline for Submissions

The deadline for submissions will be January 6, 2023. Proposals will be evaluated in January 2023. The RFP process will remain open until we have contracted our selected consultant and reserve the right to make a decision prior to our submission deadline.

### Contact Information

This project is co-sponsored by Will Fowler, CFO and Vanessa Arnedo, Chief of Staff.

Please email your proposal and/or any questions to Joe Moran, Vice President of Strategy & Planning at [jmoran@michaeljfox.org](mailto:jmoran@michaeljfox.org) with the subject "RFP".

### Terms and Conditions

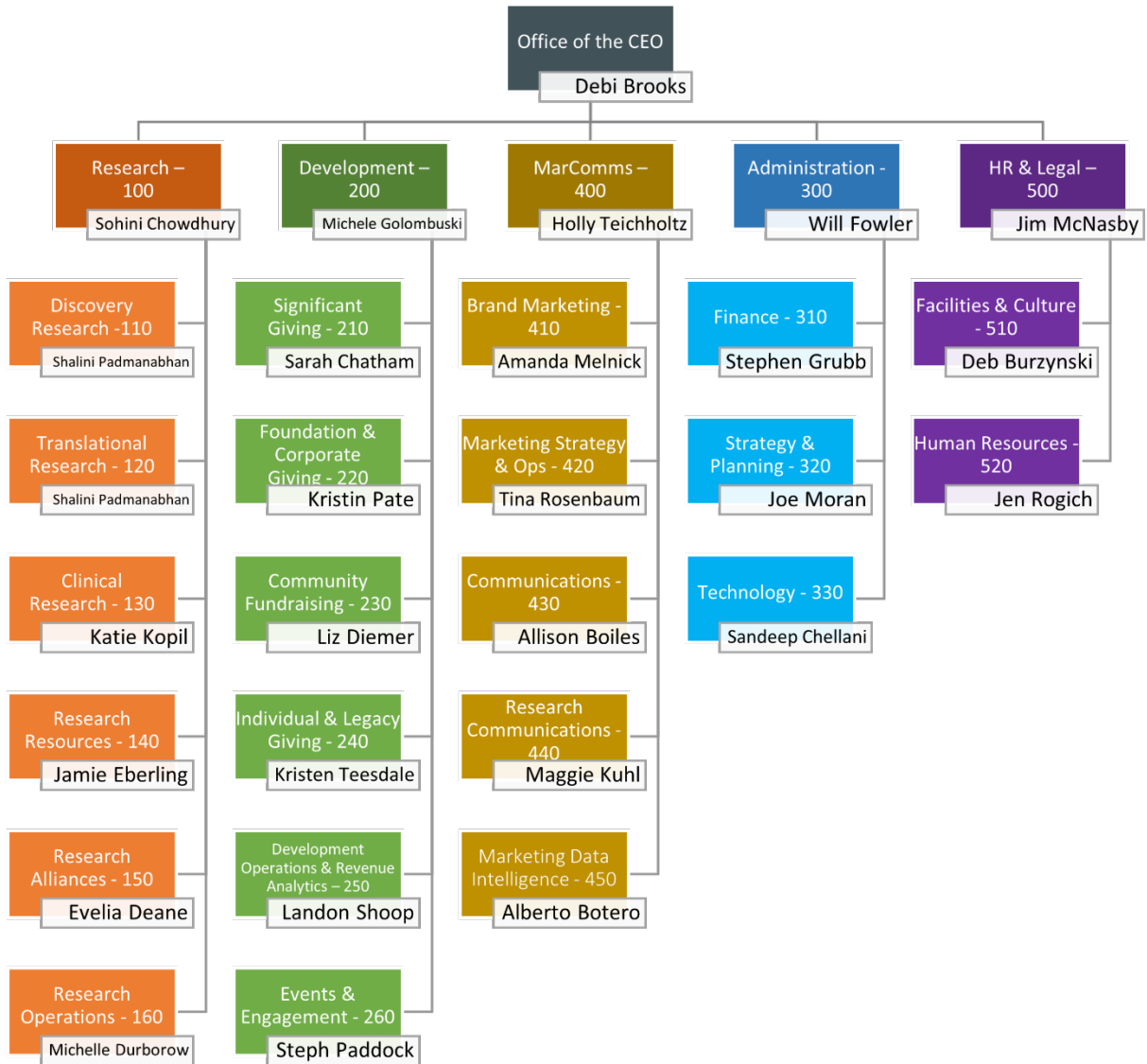
This request-for-proposals does not imply any agreement or contractual obligation. The process only serves to gauge interest for the project by respective firms. Costs involved in preliminary activities and outside of a formal statement of work will not be reimbursed by MJFF.

## Appendix 1: Current “Strategy on a Page”

Our current strategy map is based on a balanced scorecard but lacks measurable targets. Objectives are siloed into functional areas of the organization, and the core goals are not specific enough to aide in prioritization.

|                       |  |  |  |  |  |  |
|-----------------------|--|--|--|--|--|--|
| Vision                | A world without Parkinson's disease so The Michael J. Fox Foundation can go out of business.   |  |  |  |  |  |
| Mission               | The Michael J. Fox Foundation is dedicated to finding a cure for Parkinson's disease through an aggressively funded research agenda and to ensuring the development of improved therapies for those living with Parkinson's today. |  |  |  |  |  |
| Core Values           | Optimism   Urgency   Resourcefulness   Collaboration   Accountability   Persistence  |  |  |  |  |  |
| Core Goals            | 1: Execute an aggressive and far-reaching research vision that de-risks new Parkinson's therapies addressing unmet patient needs   |  | 2: Raise revenue and deepen constituent engagement to support mission-driven activities. |  | 3: Continually improve processes and organizational capabilities to support mission needs. |  |
| External Stakeholders | 1.1 Drive a diverse therapeutic pipeline   | 1.2 Improve clinical trial capacity and confidence | 1.3 Advocate for data-backed healthcare and prevention policies                          | 2.1 Be more donor- and constituent-centric | 3.1 Improve on-time performance, accuracy, and transparency                                |  |
| Financial             | 1.4 Increase strategic partners' contributions to PD research field  |  | 2.2 Diversify and balance revenue sources and resource investments                       |  | 3.2 Increase nimbleness of funds available for deployment                                  |  |
| Internal Processes    | 1.5 Optimize investments based on robust intelligence of evolving state of the field   |  | 2.3 Expand revenue opportunities and forecasting confidence                              |  | 3.3 Drive enterprise-oriented solutions  | 3.4 Sustain operational excellence               |
| Learning & Growth     | 1.6 Calibrate internal expertise & external advisory experience to maximize mission impact   |  | 2.4 Increase & track risk tolerance for higher investment in fundraising                 |  | 3.5 Develop a high performing workforce  | 3.6 Maintain an inclusive and respectful culture |

## Appendix 2: Organizational Chart



## Appendix 3: Summary List of Programs

| Department                   | Program   |
|------------------------------|---|
| 100 - Research Leadership    | 101 - Research Leadership General<br>102 - ASAP General   |
| 110 - Discovery Research     | 111 - Discovery Research General<br>112 - Define PD<br>113 - Priority Expanded Biology<br>114 - ASAP CRN  |
| 120 - Translational Research | 121 - Translational Research General<br>122 - Translational Pipeline<br>123 - Translational Measures  |
| 130 - Clinical Research      | 131 - Clinical Research General<br>132 - Clinical Cohorts & Operations<br>134 - ASAP PPMI<br>135 - PPMI<br>136 - ASAP GP2<br>137 - Clinical Development   |
| 140 - Research Resources     | 141 - Research Resources General<br>142 - Imaging Resources<br>143 - Lab Resources<br>144 - BioSample Resources<br>145 - Data Resources<br>146 - ASAP Lab Resources<br>147 - Open Science Resources |
| 150 - Research Alliances     | 151 - Research Alliances General<br>152 - Industry Alliances<br>153 - Public Policy<br>154 - Funder Alliances   |
| 160 - Research Operations    | 161 - Research Operations General   |
| 200 - Development Executive  | 201 - Development Executive General   |
| 210 - Significant Giving     | 211 - Significant Giving General<br>212 - Prospecting<br>213 - Mid-Market Stewardship<br>214 - Relationship Management  |

|                                     |                                      |
|-------------------------------------|--------------------------------------|
|                                     | 215 - Special Events                 |
| 220 - Foundation & Corporate Giving | 221 - Foundation & Corporate General |
|                                     | 222 - Foundation Giving              |
|                                     | 223 - Corporate Giving               |
| 230 - Community Fundraising         | 231 - Community Fundraising General  |
|                                     | 232 - Run/Walk                       |
|                                     | 233 - Tour de Fox                    |
|                                     | 234 - Endurance                      |
|                                     | 235 - Retention                      |
|                                     | 236 - DIY                            |
| 240 - Individual & Legacy Giving    | 241 - ILG General                    |
|                                     | 242 - Annual Giving                  |
|                                     | 243 - Planned Giving                 |
| 250 - DORA                          | 251 - DORA General                   |
|                                     | 252 - Revenue Analytics              |
|                                     | 253 - Operational Strategy           |
|                                     | 254 - Stewardship Tools & Processes  |
|                                     | 255 - Donor Services                 |
| 300 - Admin Executive               | 301 - Admin Executive General        |
| 310 - Finance                       | 311 - Finance General                |
|                                     | 312 - Financial Health               |
|                                     | 313 - Forecasting & Budgeting        |
|                                     | 314 - Financial Processes & Controls |
| 320 - Strategy & Planning           | 321 - Strategy & Planning General    |
|                                     | 322 - Enterprise Planning            |
|                                     | 323 - Enterprise PMO                 |
| 330 - Technology                    | 331 - Technology General             |
|                                     | 332 - Website Infrastructure         |
|                                     | 334 - Data Infrastructure            |
|                                     | 335 - Information Security           |
|                                     | 336 - Digital Workplace              |
|                                     | 337 - Infrastructure Management      |
| 400 - MarComms Executive            | 401 - MarComms Executive General     |
| 410 - Brand Marketing               | 411 - Brand Marketing General        |
|                                     | 412 - Audience Growth                |

|                                   |  |
|-----------------------------------|--|
|                                   | 413 - Brand Awareness                  |
|                                   | 414 - Creative Strategy                |
| 420 - Marketing Strategy & Ops    | 421 - Marketing Strategy & Ops General |
|                                   | 422 - Community Outreach               |
|                                   | 423 - Community Events                 |
|                                   | 424 - PDIQ+You                         |
|                                   | 425 - Marketing Technology             |
| 430 - Communications              | 431 - Communications General           |
|                                   | 432 - Donor Communications             |
|                                   | 433 - Core Publications                |
|                                   | 434 - Public Relations                 |
|                                   | 435 - MJF                              |
| 440 - Research Communications     | 441 - Research Communications General  |
|                                   | 442 - Community Education              |
|                                   | 443 - Physician Training               |
|                                   | 444 - Thought Leadership               |
| 500 - GC-CPO Executive            | 501 - HR Executive General             |
|                                   | 527 - Legal                            |
| 510 - Culture                     | 511 - Culture General                  |
|                                   | 512 - Employee Engagement & Journeys   |
|                                   | 513 - Employee Recognition             |
|                                   | 514 - Facilities                       |
| 520 - Human Resources             | 521 - HR General                       |
|                                   | 522 - Total Rewards                    |
|                                   | 523 - Recruitment                      |
|                                   | 524 - Talent Development & Management  |
|                                   | 525 - PEO Management                   |
|                                   | 526 - Org Design                       |
| 900 - Office of the CEO Executive | 901 - Office of the CEO General        |