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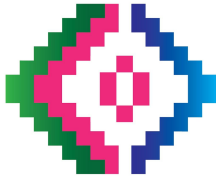
## Request for Proposal Strategic Planning and Evaluation

Position Title: Strategic Planning and Evaluation Consultant  
Position: Temporary, August 15 - November 30, 2023  
Reports to: CCL Board President and Vice President  
Contract Amount: \$10,000  
**New Deadline** for RF: **August 1, 2023**

The Cashion Cultural Legacy (CCL) seeks a consultant to facilitate a 3-5 month strategic planning process beginning in August 2023. Building from existing core programs and initiatives, the consultant will work with CCL staff and steering committee to develop a 3-5-year strategic plan for the organization that reflects the organization's vision and mission, Mexican folclórico community, and the expansion of its pillar programs. The consultant will work with CCL staff and the steering committee to ensure that this strategic plan is a practical, agile, and action-oriented tool that drives our work. The consultant will also support CCL in developing organizational evaluation strategies to measure our progress, identify areas for improvement, and adjust course. The consultant will work with CCL to ensure this strategic plan and subsequent evaluation methods are grounded in principles of racial and social justice and that we are centering the voices of those most impacted by this work.

### Responsibilities include:

- Lead a process of reflecting on existing goals, indicators of success, targets and programs; identify what is working and what needs to be changed. CCL will provide past strategic plans, work plans, evaluation documents, and other relevant materials.
- Advise on strategies for effectively engaging the arts and dance communities to identify priorities. The strategies should include the engagement of our current and former dancers, academy students, and their families as well as key nonprofit partner organizations.
- Lead development of a strategic plan for the next three to five years of equitable, sustainable, and aspirational goals and actions. The format of this deliverable will be determined collaboratively at the beginning of the project and CCL is eager to explore various options including a comprehensive written report, summary document, slide deck, etc.
- Advise and guide updating and development of evaluation tools and methods so that the people most connected to the CCL's work are centered in our evaluation efforts.
- Provide recommendations for any necessary organizational restructuring based on the new strategic plan.



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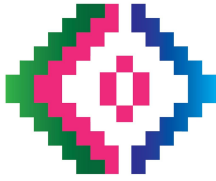
Through the above activity, the consultant will work with CCL staff, CCL Steering Committee, and some advisors/partners. The majority of this work will be virtual, however the consultant will be asked to travel to some in-person meetings. These meetings will most likely be located in San Jose, California. Travel costs are included in the budget of \$10,000. If in-person travel is not feasible, CCL will consider a fully virtual arrangement. We anticipate deliverables being complete by November 30, 2023.

## **About CCL:**

[The Cashion Cultural Legacy](#) (CCL) is committed to sustaining the preservation, presentation, and education of Mexican folk culture through dance. In honor and recognition of Dr. Susan V. Cashion and her many contributions to the dance world, the CCL pursues this mission by hosting two professional Mexican folk dance companies, offering accessible dance classes to the community, operating an artist exchange of dancers, directors, and choreographers between California and México, and managing a nascent publications project. See our latest [Impact Report](#).

### **CCL's work includes:**

- **Dance Companies:** Founded in 1969 by visionaries Ramón Morones and Susan Cashion, Los Lupeños is recognized as one of the earliest Mexican folk dance companies in California. Los Lupeños is known for its artistry, history, traditions, innovation, and endurance. Los Lupeños artists are passionate about learning and executing their art form, representing their culture, and being a positive force within the California dance community. As a program of the CCL since 2014, Los Lupeños has been a part of the fabric of San José for over 5 decades. In 2015, Los Lupeños Juvenil was created as a performing youth ensemble that parallels the traditional dance training of the main adult company. Both companies are directed by an experienced full-time artistic director.
- **Dance Academy:** Throughout its history, dance education has always been a part of the vision of the CCL and of Los Lupeños de San José. Los Lupeños Academy offers accessible public folklórico classes to all ages and at all levels at the Mexican Heritage Plaza in San José, California. Academy instructors not only teach dance, but connect the steps to music, language, customs, culture, and history. Four 10-week sessions are offered every year, each ending with a culmination event or theater recital.
- **Artist Exchange Project:** Whenever possible, CCL seizes opportunities to bolster artistic exchange between California and México by sponsoring dancers, directors, and choreographers from both sides of the border. Conceived in 2009, CCL Artist Exchange scholarships are awarded annually to individuals that show promise in their area of expertise, a keen interest in field research, and a desire to broaden their artistic perspective. With special grant support from the Hewlett Foundation this program ran at 4 times its normal size during 2022 and 2023.
- **Publications Project:** Every dance artist, choreographer, director, or instructor keeps reference notes, music, or video on their craft. The CCL has begun to collect and



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curate materials that reference the Mexican folk dance movement in México and the United States with the hope of someday having them available for the general public. This is still a dream. The CCL has taken some basic first steps, including the publication of 2 books that speak to the early days of folklórico in California and its pioneers.

**As this organization enters our 55th year, we are asking big questions, such as:**

- How can CCL complement and lead in a robust regional Mexican Dance Community?
- How can CCL strengthen its programs and services to be a more effective organization?
- In what innovative directions can the CCL grow/expand its programs and services?
- Are there opportunities to strengthen the CCL Board's roles and responsibilities?
- Are there opportunities for staffing restructure to become a more efficient organization?

**How to Apply:**

Please send proposals to [marco@cashionculturallegacy.org](mailto:marco@cashionculturallegacy.org) with the subject line "Strategic Planning Consultant." We will review submissions on a rolling basis. Proposals should be submitted no later than August 1, 2023. We encourage you to respond early. Applicants can expect to hear back by August 10, 2023.

Please limit proposals to two or three pages. In your proposal, please include the following:

- Why you are interested in working with CCL on this effort
- A proposed scope of work with a mapped budget (pricing structure may be by the hour, day, or full project). Please be specific about expected deliverables in scope of work (including proposed format) and note any aspects of work that are emergent, and depend on earlier tasks or stages.
- How you will ground this process in principles of racial and social justice.
- Relevant experience from the last three years (including relevant work samples if available).
- Two references for work completed in the last three years (include name, email, project title, and period of performance).