

Request for Proposals Strategic Planning

Deadline for Submission: March 15, 2021

Purpose

The purpose of this Request for Proposal (RFP) is to solicit proposals from facilitators experienced in strategic planning to lead the New Jersey Council for the Humanities (NJCH) Board of Directors and staff through a strategic planning process to formulate a three-year plan for the organization.

Organizational leaders seek a process that:

- Involves board members, staff, and stakeholders in identifying focal points for the strategic plan;
- Calls for the active participation of board and staff members to set aspirational goals;
- Assists the Executive Committee of the Board and the Executive Director in creating quarterly action steps with measurable outcomes;
- Identifies board committees responsible for overseeing progress, and staff and volunteer positions (current and identified) responsible for implementing the plan;
- Prepares board and staff to assume responsibility for implementing and monitoring the progress of the strategic plan;
- Prepares board and staff to plan for and address modifications to the plan as internal and external changes occur.

Background Information

NJCH is a 501(c)(3) organization that is the state affiliate of the National Endowment for the Humanities (NEH). Currently approximately eighty-five percent of NJCH's 1.2 million dollar budget comes from the federal government through a direct grant from the NEH. Other sources of income include individual donations, grants, and foundation and corporate support. Almost two-thirds of the organization's revenue is expended on programs, including grants to other non-profit organizations throughout the state and statewide programs run in collaboration with partners like libraries, community colleges, humanities scholars, and community groups. The other third of the organization's revenue is used for administrative expenses such as staff salaries and benefits, professional development, memberships, and board-related expenses.

2020 and the COVID-19 pandemic ushered in an abrupt shift in NJCH's operations and programs, but the public health threat also necessitated quick action that allowed for strategic thinking and prioritization. We are aware, perhaps more than ever before, that strategic planning must also involve thoughts about contingencies, flexibility, and adjustable timelines. In 2022, NJCH will observe its fiftieth anniversary, and with that event in sight, we would expect the new strategic plan to serve as inspiration for old and

new members alike and to lead the organization toward a celebration of its anniversary, accomplishments, and future.

The staff of NJCH includes an Executive Director, a Director of Programs, a Director of Communications and Development, and a Programs Officer, and will soon include a full-time Office Manager. The board currently includes seventeen members with a maximum of twenty-five members. The organization partners with individuals and other organizations across the state to accomplish its goals. It is important that stakeholder input be a part of the strategic planning process. The ED and Board would like to see a process for gathering input from current and past grantees and partners that considers new opportunities for growth and development of the organization. A general survey combined with smaller focus groups in key geographic areas would be appropriate for gathering suggestions from this stakeholder group.

It will be important for the strategic planning process and plan itself to set priorities with measurable outcomes.

Scope of Work

In the fall of 2020, NJCH completed an NEH self-assessment and site evaluation, both of which included feedback from program partners, and which leave the organization poised to enter the strategic planning process with ideas and enthusiasm. As the organization approaches its fiftieth anniversary, it will be particularly important to consider goals that will help move the organization forward. And the COVID-19 pandemic has provided the organization the opportunity to reflect on the effectiveness of some of its more longstanding programs during a hiatus in in-person programs and to consider discontinuing them.

Therefore, NJCH requests a proposal for a three-year plan that includes the following:

- process for reviewing quickly and efficiently gathering stakeholder feedback;
- process for identifying strengths and evaluating mission and vision statements and creating core values;
- process for developing aspirational strategic goals;
- process for developing strategic plan framework and action steps, for production of a shorter summary plan for public distribution, and for implementation plans and progress monitoring
- process for modifying the plan over its lifecycle if needed;
- timeline for creating the plan.

We expect complete facilitation of the process to be reflected in the proposal; a goal of the planning process is to create a system for the board and staff to work effectively together to create and carry out the strategic plan as well as the ongoing business of NJCH. The proposal will provide an executive summary of the work that will be performed by the consultant and a detailed work breakdown structure, with time frames, of the steps that will be taken to develop a strategic plan.

Expected outcomes of the process include:

- Coordination of the writing and editing of drafts and the final strategic plan document, including a separate, shorter document for external dissemination if necessary.
- Integration of budgeting and work plans into the broader strategic plan
- Documentation of the strategic planning process, including key discussions and decisions at each stage, for development of strategy documents and communication

The deadline for completing the strategic plan will be October 1, 2021. Please create your timeline within this framework.

Application Process and Procedures

Please provide a complete written response to this RFP which is double-spaced and does not exceed 10 single-sided pages, excluding appendices. Proposals should include:

1. A brief Executive Summary;
2. A description of the applicant's general approach to strategic planning facilitation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking;
3. A list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion
4. A detailed budget that breaks down expenses
5. Credentials and qualifications of key personnel who will take responsibility for working directly on this project
6. Three references each for key personnel who will work directly on this project
7. Example(s) of a finished strategic plan created by your company

Questions and completed proposals may be directed to the executive director, Carin Berkowitz, at cberkowitz@njhumanities.org.