Strategic Planning Request for Proposals
New Jersey Institute for Social Justice

The New Jersey Institute for Social Justice ("the Institute") seeks an experienced strategic planning consultant to design and facilitate a participatory planning process that will create a five-year strategic plan for the organization.

ORGANIZATIONAL BACKGROUND
Established in 1999 by Alan V. and Amy Lowenstein, the Institute's cutting-edge racial and social justice advocacy seeks to empower people of color by building reparative systems that create wealth, transform justice and harness democratic power—from the ground up—in New Jersey.

Known for our dynamic and independent advocacy aimed at toppling load-bearing walls of structural inequality to create just, vibrant and healthy communities, we are committed to exposing and repairing the cracks of structural racism in our foundation that erupt into earthquakes in communities of color.

The Institute advocates for systemic reform that is at once transformative, achievable in the state and replicable in communities across the nation.

Under our current strategic plan, our advocacy and partnerships have led to the restoration of the vote to 83,000 people on parole and probation; the diversion of $8.4 million in youth incarceration funding toward restorative justice hubs and other youth community-based programs; New Jersey becoming the first state in the nation to test all of its incarcerated youth for COVID-19 and the release of over 100 young people from youth facilities in response to the virus; the introduction of first of its kind state reparations task force legislation; a $15 minimum wage; a package of racial equity apprenticeship laws to expand New Jersey's workforce; the development of Newark 2020—a workforce initiative to connect 2,020 Newark residents to employment by 2020; automatic and online voter registration; the end of prison-based gerrymandering for state legislative and congressional redistricting; an independent state prosecutor for police-involved deaths; a
New Jersey Attorney General directive on youth diversionary programs/practices; the development of over 16 new policies and trainings as members of the Independent Monitoring Team overseeing reforms to the Newark Police Division; a state appropriation of $9 million for an accurate census; passage of legislation and an allocation enabling the Secretary of State to join the Election Registration Information Center; and early in-person voting.

Our work has also expanded to include national partnerships and resonance on the national level. For instance, we co-wrote a report on student debt and racial inequities with the Roosevelt Institute and the Institute for Assets and Social Policy that was cited in a Senate resolution in DC. We are collaborating on a study of engaging the formerly incarcerated in democratic processes with scholars from Harvard’s Kennedy School, MIT, and the University of Texas. We are beginning a new project with MDRC to evaluate the racial disparities in the implementation of a 2017 criminal justice reform legislation. And we are continuing our relationship with Youth First to close our state’s youth prisons while strengthening our partnership with national organizations fighting to restore the right to vote to incarcerated people.

Over the course of the strategic plan, the Institute has grown revenues to fund the growth of our team that has accomplished these policy goals. These revenues have enabled the staff to reduce reliance on our modest endowment, switching from using it to cover deficits to a role of ensuring liquidity.

The Institute’s communications and technology have improved over the course of the current strategic plan. Twitter followers more than tripled over this period and the number of users who liked the Institute’s Facebook page grew nine times. Media mentions have more than doubled. The Institute migrated its operations to the cloud before the pandemic, has upgraded computers, and streamlined financial procedures.

At present, the Institute has twenty staff and twenty-one Board members. Our current strategic plan was adopted in 2017 and is guiding our work through 2022.

THEORY OF CHANGE
The Institute’s work is driven by a five-part Theory of Change (ToC): Community Engagement, Research and Analysis, Public Education, Advocacy and Accountability. A one-page summary of this ToC is included at the end of the RFP.

SCOPE OF WORK
The project is expected to include the design and execution of a strategic planning process that meets the criteria outlined in this RFP, including project management, facilitation, budget for implementation and support structure for plan implementation. The five-year strategic plan is targeted for 2023-2027.

The Institute envisions the scope of work to be completed in three stages. We expect that the work will be completed by October 2022.
Stage 1: Preparation & Assessment
This stage requires the consultant to research and report the following in preparation for the strategic planning process. The plan will encompass work across the Institute’s three pillars of research and advocacy in Economic Justice, Criminal Justice Reform, and Democracy and Justice, as well as all operational, financial, communications, technological, governance, personnel and fund development areas of work.

Items to be considered include:

- Review organization’s history and overall organizational assessment to evaluate opportunities and/or challenges
- Conduct an environmental scan benchmarking the organization in alignment with other policy and racial justice organizations with a similar focus, regionally and nationally
- Conduct interviews, surveys and focus group polling to receive staff, Board, partner, stakeholder and community input
- Assess the current and future direction of the field, specifically private foundation investment trends, emerging research, government programs and policy efforts

Stage 2: Strategic Plan Creation
At this stage, the consultant helps the nonprofit identify strategic goals and creates an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:
  - Shared Mission and Vision
  - Proposed priorities, innovative strategies, collaborative approaches, etc.
  - SMART (specific, measurable, achievable, realistic, and time-limited) Goals
  - Objectives and tactics
  - Early action items to demonstrate progress, create momentum and buy-in
  - Listing of responsible parties and roles
  - Metrics and measurable outcomes
  - Fund Development strategies
  - Recommendations for enhancement of current financial, technological and human capacity
  - Communication strategies
  - Opportunities for including staff, leadership and the Board in achieving the goals of the strategic plan (e.g., staff retreats, leadership strategic planning meetings, etc.)

Stage 3: Feedback and Review
This stage involves presenting drafts of reports to the staff, relevant Board committees and the full Board of Trustees. Relevant dates for committee and Board presentations are below.
Important Dates to Remember

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<tr>
<th>Date</th>
<th>Event Description</th>
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<tr>
<td>Late March – Early-April, 2022</td>
<td>Draft Plan Distributed for Staff Review</td>
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<tr>
<td>Mid-April, 2022</td>
<td>Draft Plan Distributed to Board Strategic Direction Committee and Development Committee (Development portions of plan)</td>
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<tr>
<td>Mid-May, 2022</td>
<td>Revised Draft Plan Presented to Board of Trustees</td>
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<tr>
<td>July 1, 2022</td>
<td>Final draft incorporating Committee and Board Feedback</td>
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<tr>
<td>September 2022</td>
<td>Review of final draft by Strategic Direction Committee</td>
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<tr>
<td>October 2022</td>
<td>Board approves Strategic Plan</td>
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<tr>
<td>January 1, 2023</td>
<td>Plan Begins</td>
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SUBMISSION INSTRUCTIONS

SUBMISSION REQUIREMENTS

- All submissions must be electronic, standard-size (8.5” x 11”) pages.
- General Information, Narrative, Qualifications & References and Project Plan & Budget sections (see below) must not exceed 8 pages total; word count should not exceed 4,000.
- Attachments & Supporting Documents must be type-written. Include additional attachments as needed.
- Faxed or mailed copies will NOT be accepted.
- Submissions will be kept on file.

CLOSING SUBMISSION DATE & INQUIRIES

Proposals are due by Friday, October 29, 2021, 2:00 PM EST. All submissions must be sent to rfp@njisj.org. A link to the file may be provided in lieu of an attachment for excessively large electronic submissions. An email acknowledgement of each submission received will be sent to the applicant.

Additional inquiries concerning this RFP should be directed to rfp@njisj.org.

All proposals received by the deadline will undergo a preliminary screening. Any proposal may be disqualified if it deviates from the Proposal Format (see below).

PROPOSAL FORMAT

Proposals must follow this format, in this order:

1. General Information
a. **Contact information:** Name of consultant/firm, address, phone number, email address and website.
b. **RFP source:** How did you learn about this opportunity?

2. **Narrative, Qualifications & References**
   a. **Opening:** Your approach to strategic planning.
   b. **Qualifications:** Relevant work activities, expertise, knowledge and strategic planning experience. Experience should include specific examples of similar related nonprofit work. Please note any prior experience assisting policy research and/or advocacy organizations.
   Some key qualifications that will be considered:
   i. Education (degree(s) and/or certificate(s))
   ii. Experience in successfully developing strategic plans
   iii. Knowledge of collective impact or collaborative strategic initiatives
   iv. Strong facilitation skills
   v. Experience in creating a neutral environment for obtaining input
   vi. Experience in gathering and utilizing data to drive the strategic process
   vii. Ability to constructively challenge key stakeholders
   viii. Experience in inspiring others to think innovatively
   ix. Project management and change management experience
   x. Experience with community engagement and participant-centered practices
   xi. Familiarity with the core programs at the Institute (preferred but not required)
   xii. Experience working effectively with diverse coalitions and community groups, particularly of color, and able to work across political ideology, race, ethnicity, socio-economic circumstances, religion, gender, sexual orientation, and religion
   c. **Your Team:** Information about all team members who will be involved with the project, including names, email addresses, title, tenure, experience and education.
   d. **References:** Three client references (please include each individual’s name, address, phone number, email address and relationship to the bidder).

3. **Project Plan & Budget**
   a. **Work Plan:** Detailed work plan, to include:
   i. Major stages and milestones
   ii. Specific activities to be conducted at each stage
   iii. Timeline for the activities to be conducted at each stage
   iv. List of milestones and deliverables tied to the activities to be conducted at each stage
   b. **Budget:** Detailed project budget (including estimated hours, and proposed payment schedule as it relates to project milestones and deliverables).
4. **Attachments & Supporting Documents**
   a. **Work samples**: At least one sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.
   b. **Supporting documents**: Attachments may also be included.

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**EVALUATION, NOTIFICATION & TIMELINE**

**Scoring Criteria**
Proposals will be reviewed and evaluated based on the following weighted criteria: qualifications, scope of work, work plan and budget.

**Notification of Selection**
The Institute will convene an RFP Selection Committee. The final recommendation of the RFP Selection Committee will be submitted for approval by the Institute’s President & CEO and is not subject to appeal. All applicants will receive written notification of the Institute’s decision regarding their proposal.

Additional information may be required from the selected applicant prior to the awarding of the project. The Institute reserves the right not to select an applicant for project implementation if, in its determination, no qualified applicant has applied or is sufficiently responsive to the service need.

In the event that no proposal is selected, the Institute may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or issue a new RFP to attempt to expand the pool of potential respondents.

**Review Timeline**

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<tr>
<td>Release RFP</td>
<td>Deadline for receipt of proposals</td>
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<tr>
<td>Friday, October 29, 2021, by 2 p.m. EST</td>
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<tr>
<td>Monday, November 1 to Friday, November 5, 2021</td>
<td>Internal committee to evaluate proposals and select finalists</td>
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<td>Monday, November 8 to Thursday, November 11, 2021</td>
<td>Interviews with highest-ranking applicants, if applicable</td>
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<td>Friday, November 12, 2021</td>
<td>Notify the selected applicant</td>
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<td>By Wednesday, November 17, 2021</td>
<td>Startup contract signed</td>
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**TERMS & CONDITIONS**

1. **Ownership and Confidentiality**
All intellectual property will become the property of the Institute. All data remains the sole property of the Institute. The consultant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project. If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

2. Cost of Proposal
All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by the Institute.

3. Reservation of Rights
The Institute reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. The Institute may, at its sole and absolute discretion, select no provider for these services if, in its determination, no applicant is sufficiently responsive to the need. The Institute reserves the right to withdraw this RFP and/or any item within the RFP at any time without prior notice. The Institute reserves the right to disqualify any proposal, which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of the Institute. It does not commit the Institute to award any contract.

4. Conflict of Interest
Applicants agree that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and the New Jersey Institute for Social Justice. Any perceived or potential conflict of interest must be disclosed in the proposal. The following individuals or entities are ineligible to be an Institute vendor, and therefore may not submit a proposal:
- Institute employees, Board members and their family members
ECONOMIC MOBILITY

• Ensuring economic justice reform to address systemic issues

CRIMINAL JUSTICE REFORM

• Advocate for comprehensive criminal justice reform to address systemic issues

DEMOCRACY AND JUSTICE

• Civic engagement, voter rights, election protection, access to credit

Inspired by the fierce urgency of now, the Institute’s social and racial justice advocacy knocks down load-bearing walls of structural inequality and builds reparative systems that create wealth, transform justice, and harness democratic power—FROM THE GROUND UP—in New Jersey’s urban communities.