



October 20, 2021

## **REQUEST FOR PROPOSALS FROM NONPROFIT STRATEGIC PLANNING CONSULTANTS**

### **PURPOSE**

Bergen Volunteers has initiated a Request for Proposal (RFP) process to identify qualified consultants to guide and execute a strategic planning process with our stakeholder community to inform a three year strategic plan to be implemented May 2022 - May 2025.

### **WHO IS ELIGIBLE TO RESPOND?**

Bergen Volunteers seeks consultants who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, have strong facilitation skills, and have proven experience with nonprofit strategic planning. In addition, consultants should have knowledge of the Bergen County area's unique needs and culture, and the County's landscape of corporate, small business, and nonprofit services.

### **ORGANIZATIONAL OVERVIEW**

Bergen Volunteers is a dynamic 55-year old 501(c)(3) organization that is the hub of Bergen County's social welfare network. Bergen Volunteers offers unique services in collaboration with compassionate volunteers and nonprofit agencies all working together in order to address critical community needs.

The mission of Bergen Volunteers is to turn caring into meaningful action by engaging volunteers to improve lives and strengthen the community via a three-pronged approach: Volunteerism through our own and external community programs, community engagement, and civic leadership.

As an organization we value community partnerships. We are committed to being a strategic partner to nonprofits by helping agencies across the county build capacity and fulfill their missions. Bergen Volunteers' partners include hundreds of nonprofit agencies, civic and community organizations, educational institutions, and corporations. We anticipate that our collaboration gives us the ability to help even more community members as we continue to be a pivotal center for community needs.

We match volunteers with other nonprofits in need of volunteers and professionally manage several volunteer based, direct-service programs. These life-changing community services include:

1. CHEER: Home support such as grocery shopping and medicine pickup for the elderly.
2. CHORE: Residential Maintenance to help individuals remain safely in their homes.
3. Mentoring: Connects adolescents between the ages of 8-21 years old with significant personal challenges, First Generation College Students, Caregivers, and Senior Citizens with trained adult mentors.
4. Leadership and Civic Engagement: Leadership and civic training through Bergen LEADS, College LEADS, and Teen LEADS



5. Friday Forum: A powerful networking and learning series that delves into community issues and challenges.
6. All Wrapped Up: Our holiday gift giving program. We match our low-income clients with numerous donors from our community.
7. Bergen READS: Helps elementary school students from districts with high populations of at-risk students learn to enjoy and improve their reading skills.
8. Making-It-Home: We provide gently used furniture for individuals and families moving out of shelters and into permanent housing.
9. Redefining Retirement: Matches volunteers with our own programs and other nonprofit agencies in Bergen County.
10. Summer Campership: This is a scholarship program where children from lower income working families are sent to local day camps.
11. VITA: An IRS certified program to provide free tax assistance to low-to-moderate income individuals and families, the disabled, the elderly and ELS who need assistance with their tax forms.
12. Corporate Engagement: We help business leaders engage their employees with community service opportunities to fulfill their corporate social responsibility to those in need.

Bergen Volunteers serves 7,000 individuals each year with funding from grants, contracts, and fees. We receive government funding from the County of Bergen Senior Services, Community Development, and the State of New Jersey. We have 12 employees located in 1 office. Our annual revenue has ranged between \$420,377 and \$1,348,161 over the past 5 years.

Additional information about the organization's programming and impact is attached at APPENDIX A.

### **THE OVERARCHING QUESTIONS FOR WHICH WE ARE SEEKING ANSWERS**

1. How are we perceived by stakeholders?
2. What is our unique value proposition?
3. Why do existing donors support our work?
4. What are the opportunities and risks in the current landscape and can we leverage/mitigate with our current capabilities?
5. How do we create a choice of compelling in-demand B2B offers for the: a) the public sector, and b) private sector?
6. How do we expand and deepen our engagement with existing and new high networth donors?
7. What is the roadmap for the organization to leverage its unique value proposition to capitalize on gaps and opportunities?
8. How do we significantly increase our income through opportunities which are not restricted grants?

### **SCOPE OF WORK AND DELIVERABLES**

Bergen Volunteers is at an important juncture in its evolution. We want to create urgency and demand for the service-centric experiences we provide for our clients, our partners, and our donors. We want to challenge ourselves - and our Board - to become a strategic 'partner of choice' to our stakeholders. We



actively seek proposals that demonstrate considered and brave approaches that will provide the foundation of this next critical stage of our influence and growth. We are ready to consider bold choices to ensure our offer is relevant and in-demand. We are therefore seeking a thought partner to help guide our approach and execution to achieving these aims.

We expect the project to include:

1. Internal Consultation including, but not limited to, key Board members and staff
2. External Consultation including, but not limited to, existing and potential public agency partners, existing and potential private sector partners, existing and potential donors in order to understand perception and brand equity.
3. Stakeholder Engagement Mapping Matrix depicting Stakeholder Influence/Power vs. Stakeholder Interest
4. A county-wide Community Needs Assessment depicting gaps and opportunities from which the strategy will be shaped
5. Design and execution of a strategic planning process that meets the criteria outlined in this RFP including team facilitation and project management
6. Development of a three-year strategic plan (2022-2025) that includes a budget and roadmap for implementation
7. Development and execution of a support structure and materials for planned implementation and change management (logic models, timelines, roles and responsibilities, etc.)

The proposal should include:

1. A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project
2. Qualifications of all consulting staff who will be assisting with the project such as; education, position within consulting firm, years and type of experience and LinkedIn profiles
3. Time and Cost projections including a payment schedule

## **PROJECT GOALS AND TARGET AUDIENCE**

Bergen Volunteers envisions the scope of work to be completed in three stages. Work completed in each of the stages will be summarized in a report to the Board of Directors and stakeholder community.

### **1. Stage 1- Pre-planning**

This stage requires the consultant to research and report the following in preparation for the strategic planning session. Items to be considered:

- Review of organization's history and overall assessment through gap or SWOT analysis of the organization to evaluate opportunities and risks
- Benchmarking the nonprofit in alignment with strategic plans of other nonprofits and/or businesses with a similar focus
- Proposed survey questions and other engagement tools for the different stakeholder groups



- Interviews, surveys, and focus group polling to receive partner and community input
- Development of a shared understanding of the current status of Bergen Volunteers

## **2. Stage 2- Strategic Planning Creation**

At this stage, the consultant helps identify our unique value proposition, strategic goals and create an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:
  - Shared Mission and Vision
  - The Organization's unique selling point
  - 3-year strategic objectives
  - Strategies to support each objective
  - SMART (specific, measurable, achievable, realistic, and time-limited) Goals to support each objective
  - Tactics
  - Listing of responsible parties and roles
  - Short term and medium term Outcomes
  - Measurables
  - Required competencies/behaviors for Board, Leadership, and staff to adopt and sustain changes
- Optional items to the plan would include:
  - Resource Development strategies
  - Recommendations for enhancement of current financial, technological, and human capital
  - Communication strategies

## **3. Stage 3- Implementation and Evaluation follow-up**

This stage requires the consultant to assist the nonprofit by providing oversight of the implementation and evaluation process. This process should include:

- Follow-up sessions with nonprofit leadership to gauge the progress of the implementation at 3 and 6-month points after plan delivery
- Gathering of any measurables that would give indication of successful implementation

### **OWNERSHIP AND CONFIDENTIALITY**

All intellectual property will become the property of the nonprofit organization receiving services. All data remains the sole property of the nonprofit organization. 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.



## PROPOSAL FORMAT

Please include the following information in your proposal:

1. Your approach to strategic planning
2. A summary of your strategic planning experience
3. Identify specific nonprofit sectors in which you have conducted strategic planning
4. Three Client references
5. Sample project timeline with major tasks and milestones
6. Detailed project budget
7. Sample project plan
8. Identification of those on your team who will be involved with the project which should include their role and experience

The proposal must also include the following specific information:

**General information-** The proposal should provide the name of the consultant, title, address, phone number, email address, LinkedIn profile, and website, if one exists. The name, email address and LinkedIn profile, for any team members assisting in the project should also be included.

**Consultant Qualifications and Roles-** The proposal must describe the consultant's qualifications such as work activities and experience in similar related nonprofit work. Some key qualifications that will be considered:

- Significant track record in successfully collaborating with management teams to identify unique value propositions and develop strategic plans to leverage them
- Strong facilitation skills
- Experience in creating a neutral environment for obtaining input
- Experience in gathering and utilizing data to drive the strategic planning process
- Ability to constructively challenge key stakeholders
- Education (degrees(s) and/or certificates)
- Experience in inspiring others to thinking innovatively
- Project management experience
- Knowledge of Bergen County landscape and the nonprofit sector

**Work Plan-** The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work including:

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones and deliverables tied to the activities
- Proposed payment schedule tied to project milestones and deliverables



**References-** Information regarding each reference should include the individual's name, address, phone number and email address.

**Previous Work Product-** The proposal should include at least one sample of a previously completed strategic plan. Portions may be redacted to protect private information as needed.

## SCORING

Proposals will be reviewed and evaluated on the following criteria:

1. Qualifications and track record of creating new value for clients (35%)
2. Scope of Proposal (25%)
3. Work Plan (25%)
4. Budget (15%)

## PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION

Instructions for submission

### 1. Closing Submission Date

Proposals are due by 5:00 p.m. on Wednesday, December 1, 2021

### 2. Inquiries

Inquiries concerning this RFP should be directed to Nina Bachrach, CEO 201.489.9399, [nbachrach@bergenvolunteers.org](mailto:nbachrach@bergenvolunteers.org)

### 3. Conditions 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 Bergen Volunteers

### 4. Submission Instructions

All submissions must also include an electronic version sent to: [nbachrach@bergenvolunteers.org](mailto:nbachrach@bergenvolunteers.org) **with the subject line: Strategic Plan RFP Enclosed.** An email acknowledgement of each submission received will be sent to the applicant. All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP. Submissions will NOT be returned.

### 5. Reservation of Rights

Bergen Volunteers 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. Bergen Volunteers 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. Bergen Volunteers reserves the right to withdraw this



Request for Proposal (RFP) and/or any item within the RFP at any time without notice. Bergen Volunteers reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of Bergen Volunteers. It does not commit Bergen Volunteers to award any contract.

## **6. Confidentiality**

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

## **7. Ineligibility**

Under the following conditions, an individual or entity is ineligible to be a Bergen Volunteers vendor, and therefore may not submit a proposal.

**Conflict-of-Interest:** Any individual or entity that has a conflict of interest under NJ law, including with respect to any requirements from applicable governmental agencies and the IRS.

## **8. Notification of Selection and Timeline**

Bergen Volunteers will create an RFP Task Force. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled with finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists.

The final recommendation of the RFP Selection Committee will be submitted for approval by the Bergen Volunteers CEO and is not subject to appeal. All applicants will receive written notification of Bergen Volunteers' decision regarding their proposal, and an announcement of the applicant awarded the project will be posted on BV's website, [bergenvolunteers.org](http://bergenvolunteers.org).

Additional information may be required from the selected applicant prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies or client abuse shall disqualify the applicant from award of the project and/or contract. Bergen Volunteers 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, Bergen Volunteers may elect to either not develop the service pending further analysis of alternatives to meet the expressed need, or to issue a new RFP to attempt to expand the pool of potential respondents.

### **Contact Person**

Completed RFP submissions including all elements listed above are due to Bergen Volunteers by 5:00 p.m. EST on Wednesday, December 1, 2021. Submissions shall be mailed or delivered to:



Attn: Nina Bachrach – Chief Executive Officer, 64 Passaic Street, Hackensack, NJ 07601 and also emailed to [nbachrach@bergenvolunteers.org](mailto:nbachrach@bergenvolunteers.org).

Timeline:

<u>October 20, 2021</u>	RFP Release Date
<u>December 1, 2021 at 5pm EST</u>	Deadline for receipt of proposals
<u>December 2 – December 10, 2021</u>	Evaluation of proposals by Selection Committee
<u>December 13 – 15, 2021</u>	Interviews with highest-ranking applicants, if applicable
<u>December 16, 2021</u>	Notice of selection mailed to applicants
<u>December 17, 2021</u>	Startup contract signed
<u>December 20, 2021</u>	Notification of project award posted on BV website

Sincerely,

Nina Bachrach  
CEO, Bergen Volunteers

Encl: Bergen Volunteers audit report and Form 990 for last fiscal year





## APPENDIX A

Programs include:

1. Volunteerism: We provide critical services to youth, families, veterans, seniors, and those who are economically disadvantaged in our community. We connect volunteers with our own programs and those offered by the nonprofit community.
  - a. Our community programs: Bergen Volunteers serves as the hub of the community's social welfare network, offering unique services and programs that serve all of Bergen County.
    - i. Ongoing Programs:

1. CHEER: Chore Homemaker Education Encouragement Rehabilitation. CHEER provides a helping hand to seniors and those with disabilities to enable them to live safely and independently in their homes.

Volunteers and clients forge lasting relationships by offering companionship and whenever possible, create opportunities for their CHEER clients to be engaged in their communities.

CHEER volunteers visit weekly to help home-bound seniors with tasks such as grocery shopping and light errands such as prescription pick-up, library book returns, or the post office.

2. CHORE: Community Helpers Offering Repairs and Empathy  
CHORE helps Bergen County seniors and those with disabilities remain safe in their homes by offering repair services.

CHORE Jobs Include:

- Installing grab bars and wooden banisters
- Replacing outlets and switches
- Repairing leaky faucets
- Installing door bells and locks
- Changing light bulbs and smoke alarm batteries

3. Mentoring

Bergen Volunteers' Mentoring program provides individuals with one-on-one long and short-term support. Our staff and volunteers help mentees learn about the resources available within the community while tapping into their strengths to identify and strive towards specific personal improvement goals.

Our long-term mentoring program runs for 12 months and matches volunteers with:

- Youth 8 – 18+
- Caregivers (parents, guardians, foster parents, grandparents, people caring for a senior)
- First generation college students



Our short-term mentoring program runs month-to-month and is designed to provide bi-weekly phone check-ins. We match:

- Seniors to Seniors (high school seniors to senior citizens)
- Adults to high school age and up

4. Making-It-Home

Making-It-Home brings furniture to formerly homeless veterans, victims of domestic violence, seniors, and individuals with disabilities, who are moving from emergency shelter into unfurnished apartments. Clients are referred by partner agencies including Bergen County's Housing, Health and Human Services Center (the shelter); the County's Division of Veteran Services; Catholic Charities; the Center for Hope and Safety; and many more.

Each week we coordinate with donors to pick up their gently-used furniture and we organize teams of volunteers to transport the furniture. Making-It-Home keeps thousands of pounds of quality pieces out of our landfills.

This free service enables our clients to live in safe and comfortable environments that improve their quality of life and ability to achieve greater self-sufficiency and a brighter future. We "make their house a home."

5. Bergen READS: Reading with Enjoyment Assurance Dedication and Success.

Bergen READS combats illiteracy in Bergen County by training Reading Buddies to work one on one with students in grades K-4. Reading Buddies serve as tutors, advocates, friends and mentors, meeting individually with students each week. Buddies help elementary public school students enjoy and improve their reading skills in a comfortable and friendly environment.

ii. Seasonal Programs:

1. All Wrapped Up: All Wrapped Up is Bergen Volunteers' Holiday Giving Program, which matches individuals and families in need with willing donors from the community.
2. VITA: Volunteer Income Tax Assistance. VITA is an IRS-certified program to provide free tax assistance to low-to-moderate income individuals and families, those with disabilities, the elderly and English Language Learners, who might need assistance with the forms.

- b. Connecting volunteers to external nonprofit organizations: One of the major pillars of our mission at Bergen Volunteers is to partner with the nonprofit sector across the broader Bergen County region, strengthening our community. We are committed to becoming a strategic partner to all nonprofits by helping each organization to fulfill its mission. For this purpose, we have developed an array of services and benefits for our



agency members. These offerings are aimed at helping improve the effectiveness of nonprofits, thus allowing them to have greater impact on the community they serve.

- i. Access to a robust and highly accessible database (Get Connected) which maintains comprehensive data on agencies and their volunteer opportunities.
  - ii. Build strategic relationships with organizations across the nonprofit and private sector through our Executive Director Roundtables, annual "speed dating" event, and the opportunity to host an All In a Day's work event.
  - iii. Share events through the Events page on Get Connected, including both fundraising events and volunteer outreach.
  - iv. Gain cost efficiency through shared services like our special events tool inventory or our office for a meeting space.
2. Community Engagement: We provide individuals and businesses with networking and service opportunities and training with leading professionals from the private and public sectors that address community needs.
  - i. Get Connected. Through our interactive database, individual volunteers are matched with our agency members. Our system tracks hours, offers suggestions, and emails new opportunities that arise.
  - ii. Redefining Retirement: creating an enjoyable and worthwhile volunteer role for retirees looking for their second act.
  - iii. Friday Forums: The Friday Forums are powerful networking and learning events that attract 200+ leaders from every sector of Bergen County for high-profile speakers, networking, and stimulating conversation.
  - iv. Family Volunteer Day: Family Volunteer Day brings families together for a wonderful cause. Families and children of all ages join together to learn values like kindness, empathy and respect for others.
  - v. Lunch & Learns: Virtual learning and networking events delivered by Bergen Volunteers. Each event includes an expert speaker to offer participants insight into a new topic and the ability to ask questions and network with other participants.
3. Civic Leadership: We provide leadership and professional development opportunities for individuals living and working in Bergen County, educating people about our community and training them to be civically active.
  - a. Bergen LEADS: Bergen LEADS is an exciting, 10-month learning and leadership adventure for adults who live or work in Bergen County. Created by a group of community leaders, participants learn about issues from leaders in the field, site visits and assigned readings. Interactive, fast-paced and experiential, Bergen LEADS helps individuals see the community – and themselves – through new eyes. Bergen LEADS has gained a reputation as a “think tank” for challenges facing our County. Each class focuses on a specific topic and in June of each year, the graduating class presents their findings and recommendations at a Public Forum.
  - b. College LEADS: College LEADS is a program for students to learn about local government and public policy. Students analyze community issues and develop new approaches to problem solving. The students take a deep look into a compelling issue. They look at the



many facets of the issues figuring out where their generation can take a stand and make an impact.

- c. Teen LEADS: Teen LEADS is a program for high school students to learn about local government and public policy. Students analyze community issues and develop new approaches to problem solving. The program is designed to get students involved in their community to become effective community leaders.