

REQUEST FOR PROPOSALS: STRATEGIC PLANNING FACILITATION

APRIL 16, 2024

A. Summary

Tribe 12 seeks a consultant or a team of consultants to co-design and facilitate our next strategic planning process. The consultants will work with a Strategic Planning Committee made up of 4-6 members of our Board, Staff, Donors, and Constituents. Tribe 12's most recent Strategic Plan was extended during the pandemic, and after a bridge plan during a leadership transition, we are ready to undertake a full analysis of our organization. We anticipate the work to begin in August 2024 and be completed around April/May of 2025.

1. Eligibility

Individuals, non-profits, consulting firms, and teams of individual consultants are invited to submit proposals. Successful applicants will have significant expertise in facilitating strategic planning processes and with at least two of the following three priorities for Tribe 12: (1) Jewish community, (2) Gen Z and Millennial generations, (3) Diversity, Equity, and Inclusion.

2. Budget

We are interested in a thorough and cost-effective process. We anticipate proposals with a budget range of 30,000 – 50,00 USD. Budgets will be reviewed based on the strength of the proposal's ability to meet the project objectives cost-effectively.

3. Deadline

Proposals should be submitted by email to Rachel Dukeman at BoardPresident@tribe12.org by May 13, 2024. Questions should be submitted by May 6. We anticipate interviewing finalists in early June and making a selection by June 18, 2024.

B. About Tribe 12

Tribe 12's mission is to **connect people in their 20s/30s to Jewish life and community in Philadelphia** today so they will choose to stay connected tomorrow.

Tribe 12 traces its roots back to a program started by Annabel Lindy in 1998. At the time, it was called 'The Collaborative' and functioned as a consortium of Jewish organizations in Philadelphia that would reach out to unaffiliated 20s/30s.

When Annabel passed in 2010, she gave her blessing to found and endow an independent organization, Tribe 12, with her husband Phil as the founding President. Today, Tribe 12 serves approximately 2,000 people a year in its virtual and in-person offerings. The Tribe 12 community welcomes all those who identify as Jewish, whose partner is Jewish, or who are exploring Judaism.

Tribe 12 offices are in the Weitzman National Museum of American Jewish History.

Tribe 12 Core Programs include:

- **Accessible On-Ramp Events:** Monthly Trivia Nights or happy hours, Shabbat Dinners, Game Nights and more which welcome anyone and everyone into the community
- **Tribes:** Micro-communities for constituents with shared identities or interests which meet 6-12 times a year including a LGBTQIA+ Tribe, 20s Tribe, 30s Tribe, Couples Tribe and more!
- **Ongoing cohorts:** At Tribe 12 we strive to be a place where young adults can learn, grow, and become the people they strive to be in the world! We offer multiple opportunities each year to be a part of a learning cohort. Examples of recent cohorts include Judaism and Adulthood, Judaism and Magic, and our signature Fellowship for Entrepreneurs.
- **Matchmaking:** We have two in-house matchmakers helping local young Jewish adults find partnership.

C. Project Overview

The world has changed significantly since our founding – and certainly in the past four years. Tribe 12 seeks a planning process that prioritizes constituent feedback to inform our strategic direction.

Through this planning process, we are open to reviewing, evaluating, and refining:

- ◆ Audience (who we serve)
 - How has the pandemic changed our population?
 - What are they looking for?
- ◆ Programs (how we serve our mission/vision)
- ◆ How do we enact and embody DEI as an organization?
- ◆ Financial Sustainability (how do we secure the resources we use?)
- ◆ Branding (how we tell the story of what we do?)
- ◆ Growth opportunities (how might we expand without sacrificing mission?)

We are open to having much of this planning process, including facilitating consultation sessions and focus groups, take place virtually via Zoom, but we know that face-to-face is hard to beat. We may infrequently ask consultant(s) to travel to our Philadelphia office for in-person meetings. Tribe 12 would cover consultant travel costs for these occurrences.

D. Timeline

Task	Timing
RFP published	April 16, 2024
Questions due	May 6
Proposals due	May 13
Finalists invited for an interview	June 1
Consultant(s) selected	June 18
Strategic planning process starts	Late July/August 2024
Board Retreat	September
Project completion	April/May 2025

E. Proposal Format

We value creativity and meeting people where they are, so please feel empowered to send a proposal in a format that best suits your style. You may wish to keep in mind that real humans will be reviewing these and most of the selection committee members are volunteering their time to do so. As such, we recommend using formats that are easy to comprehend (read: not too time intensive) and easily accessible by email (an attached PDF or a link, for example).

We also recommend including the following information in your proposal:

1. Core Team Bios or CVs – Who are you?
2. Approach to Strategic Planning – How do you go about planning?
3. Scope of work – What will you do?
4. Timing – When will you do it?
5. Deliverables – What will be produced from this process?
6. Budget – How much will it cost?

F. Evaluation Criteria

CRITERIA	WEIGHTING
1. Proposal depicts capacity for strategic planning <ul style="list-style-type: none"> • Demonstrated experience facilitating strategic discussions • Facility with a diverse range of stakeholders 	30%
2. Consultant (/team) demonstrates experience and competency with at least two of the three following priorities for Tribe 12: <ol style="list-style-type: none"> a) Jewish community b) Gen Z and Millennial generations c) Diversity, Equity, and Inclusion initiatives 	20%
3. Understanding of the key issues facing Tribe 12 <ul style="list-style-type: none"> • Demonstrated understanding of the planning process objectives and a proposed process tailored to Tribe 12 	25%
4. A comprehensive proposed planning process <ul style="list-style-type: none"> • Proposal has a clear timeline and scope of work that fits with the RFP guidelines and resonates with Tribe 12's guiding principles and planning objectives 	15%
5. Proposed costs are reasonable and keep our budget in mind.	10%