



## **Request for Proposals Facilitative Leadership Advisor and Meeting Facilitator**

**Deadline for Proposals: March 5, 2021**

### **OVERVIEW**

New Jersey Future seeks to secure consulting expertise in the field of facilitative leadership, specifically equity accountability and process facilitation, to advise us as we build and run a new collaborative project called Lead-Free NJ. The selected consultant will be part of a facilitation team initially, working in conjunction with Regina Podhorin of The Leadership Group, to assist with creating a strong coalition with shared ownership of the agenda; shared leadership; a large, diverse group of participants; collective decision-making; effective communication to share information and leverage resources; and a strong voice on statewide policy and advocacy. Regina Podhorin is contracted to work through the end of June 2021 to help facilitate the collaborative launch. The selected individual or firm will support the group by advising staff on many concrete activities, projects, and campaigns aimed at advancing a common goal.

### **BACKGROUND**

Founded in 1987, New Jersey Future is a nonprofit, nonpartisan organization that promotes sensible growth, redevelopment, and infrastructure investments to foster vibrant cities and towns, protect natural lands and waterways, enhance transportation choices, provide access to safe, affordable, and aging-friendly neighborhoods, and fuel a strong economy. New Jersey Future does this through original research, innovative policy development, coalition-building, advocacy, and hands-on strategic assistance. Embracing differences and advancing fairness is central to New Jersey Future's mission and operations. To effectively advance its mission, New Jersey Future is firmly committed to pursuing greater justice, equity, diversity, and inclusion through its programs, internal operations, and external communications.

In 2020, New Jersey Future launched a new project, Lead-Free NJ, to ensure lead-free children and a lead-safe environment through changes to state and local policy. Staff and partners are working to launch a diverse coalition of state-level policy advocates, grassroots groups in impacted communities, and practitioners. In 2021, this group will become a powerful coalition pushing for action to address legacy lead hazards in low-income communities and/or communities of color while also creating the conditions for lead-free children statewide.

January 19, 2021

New Jersey Future serves as the “backbone organization” for Lead-Free NJ, and members of its staff facilitate the collaborative’s work.

### **Engaging Partners to Advance an Ambitious Agenda**

New Jersey Future, along with several partners, has engaged a diverse body of stakeholders to pursue solutions to the issue of childhood lead poisoning. Jersey Water Works (JWW), a cross-sector collaborative focused on transforming New Jersey’s inadequate urban water infrastructure which New Jersey Future supports, began to review this issue in earnest in 2015. In 2018, Green & Healthy Homes Initiative, another partner organization, issued a detailed, collaborative [report](#) that provides recommendations for New Jersey to address lead risks in housing, soil, and drinking water and details strategies to eliminate childhood lead poisoning in New Jersey in 10 years. In 2019, JWW’s Lead in Drinking Water Task Force created a practical, broadly-supported agenda for eliminating lead in drinking water and published a [report](#) detailing recommended actions New Jersey can take to virtually eliminate lead in drinking water in 10 years.

In December 2019, more than 25 representatives from nonprofit, government, and philanthropic organizations attended a gathering convened by The Fund for New Jersey to explore the possibility of a collaborative group that would pursue a holistic agenda tackling lead from paint, water, and other sources. Together, they shaped Lead-Free NJ’s purpose statement and suggested three priorities for action:

- Disclosure of lead in homes at the point of rental turnover and home sale.
- Transparency of data on lead poisoning that enables mapping.
- Coordination of state agency efforts.

In addition, participants expressed strong desire for impacted communities and communities of color to be well-represented in the group and its leadership.

Lead-Free NJ has grown out of the aforementioned efforts, and is supported by a two-year grant from the Robert Wood Johnson Foundation (RWJF). This grant is among several that the Robert Wood Johnson Foundation recently awarded to organizations working in New Jersey on policy initiatives that will advance key recommendations from RWJF’s 2019 report, "Building a Culture of Health: A Policy Roadmap to Help All New Jerseyans Live Their Healthiest Lives." The goal of the report and the RWJF-funded follow-up grants is to eliminate health inequities resulting from unjust, unfair policies and practices that have persisted for generations. This project is also closely aligned with grant-funded efforts by The Fund for New Jersey to support community-based Lead-Free NJ initiatives.

In mid-November 2020, a program manager and a community outreach coordinator were hired to support Lead-Free NJ. The program manager leads the day-to-day work and oversees all aspects of the project, and the community outreach coordinator supports the project’s community engagement efforts. As New Jersey Future staff works to create the foundation for this new collaborative, we continue to meet with a core group of partners monthly to share information, establish collective objectives for 2021, and outline action steps in this iterative process. A draft Lead-Free NJ description and proposed structure have been crafted by this

January 19, 2021

group in an effort to describe the collaborative. These documents are available for interested applicants upon request. If interested, please contact Jael Davis at [jdavis@njfuture.org](mailto:jdavis@njfuture.org).

New Jersey Future will now take the collective, cross-sector work and the momentum that has been created around lead-free solutions in New Jersey and use it to launch the collaborative campaign. This campaign will integrate both community and statewide advocate voices to effect widespread change locally and statewide.

We seek a structure that has shared ownership, leadership, participation, and a foundation centered on the needs and perspectives of affected communities. To this end, New Jersey Future will play a support role as:

- **Facilitator.** Focused on clarifying high-level goals and measures, creating and convening a steering committee for strategic leadership, advising a branding initiative to name the movement, facilitating an equity-centered approach, and creating a collaborative that makes it easy for groups to participate at different levels.
- **Connector.** Responsible for advising development of a public-facing website and member-only digital platform for the movement, creating a protocol and process for regular communication, establishing new lines of communication and ways for individuals and organizations to participate.
- **Coordinator.** Coordinating small groups, committees, and community efforts with specific objectives related to advancing the movement, including external communications, education and training, best practices, funding, and community empowerment.
- **Implementer.** Conducting specific research, tasks and follow-ups that support existing campaigns, projects and committees that are critical to the movement, in line with New Jersey Future's core competencies and that would otherwise not get done.

## **SCOPE OF WORK**

### **The Need for a Consultant to Help Facilitate a Cooperative, Equitable Approach**

New Jersey Future expects all work for this project to reflect a culture of equity. The consultant should have familiarity with, and the ability to incorporate, one or more of the following concepts: equity accountability facilitation, process facilitation, equity by design, social capital, and collaborative management best practices. The consultant's work will require knowledge of racial justice issues, and experience in an environmental justice context would also be helpful. We anticipate that the consultant will need to hold both staff and coalition members accountable, ensuring that every effort of the group considers equity as it aims to remove disadvantages related to lead hazards and foster meaningful involvement among those affected. This means making certain that all voices are heard — including people of color; people from diverse backgrounds, socio-economic statuses, regions of the state, etc; and people with a wealth of different life experiences — as the collaborative pushes efforts forward to make measurable progress across the state. This may mean managing conflict, working in high-pressure situations, addressing injustices, applying pressure at decision-making points, and reminding members often of the importance of equity as it relates to specific activities.

January 19, 2021

### **Areas of activity**

New Jersey Future is seeking a consultant to perform two key roles: facilitated leadership guide and group meeting facilitator. As a guide, the consultant will be expected to work with New Jersey Future to establish a 17-month work plan (with greater focus on the first year) that includes realistic milestones and a group process for reaching them. The work plan will be due within 30 days of signing the contract. The consultant will meet with New Jersey Future staff and the initiative's leadership on a regular basis to assess progress, establish next steps, and troubleshoot problems. As a meeting facilitator, the consultant will facilitate required small- and large-group meetings that are part of the work plan. This facilitation will include meeting preparation, meeting management, and debriefing. In addition, the consultant will provide guidance to the staff and leaders of the collaborative throughout.

Regina Podhorin has been contracted to coach the selected consultant through these activities. She will be available about 2-4 hours per month until June 30, 2021. She will serve as an advisor to the consultant on collaboration, collective impact, and best practices for new collectives. She will also be available to answer questions and share historical knowledge related to the group and its member organizations.

It is expected that the consultant will work approximately 5-10 hours per month. Some of the expected deliverables for this project include:

- a. **Assessment of the leadership structure and operations.** We are working on establishing a 12-member steering committee to govern the collaborative by providing strategic leadership, creating a structure that allows for shared decision-making, and making it easy for various groups to participate at different levels. We have drafted a proposed structure, including function and membership, and proposed operating procedures, on which we seek input from the consultant before we share this information with potential steering committee members. Ensure that these documents reflect both collaborative and equity norms of behavior for members and the design of an operating structure that ensures a welcoming, safe, and inclusive environment for all.

*Deliverable/Timeframe: Help New Jersey Future finalize leadership structure and operating procedures in March.*

- b. **Assessment of local capacity building model.** Provide input on design of a local capacity building model to ensure a good balance of consistency across towns while encouraging local customization. The design of the model will support building capacity to reach and engage diverse communities in local- and state-level policy advocacy and in building local support for implementation of local action on lead-free solutions.

*Deliverable/Timeframe: Help New Jersey Future finalize the capacity building model in March. Provide ongoing guidance by ensuring that equity is incorporated into community training sessions.*

- c. **Facilitation of shared purpose and goals.** Engage start-up members in setting collaborative/equity-by-design norms through training and facilitation of critical discussions about the shared purpose and priority actions. The results of this early awareness building and discussion will form the basis of the operating standards for the collaborative effort. Because the three policy priorities (a. disclosure of lead in homes at the point of rental turnover and home sale; b. transparency of data on lead poisoning that enables mapping; c. coordination of state agency efforts) have established a good potential starting point for this effort, we hope for an efficient process. We fear that the group may have “planning fatigue” and suggest looking for ways to integrate this into member meetings, branding outreach, or other efforts.

*Deliverables/Timeframe: Work with staff and leadership to draft goals and measures and develop a strategy for incorporating equity into the collaborative. Attend late March Steering Committee meeting and April membership meeting to facilitate discussion. Seek to wrap up process by July.*

- d. **Assessment of member needs and desires.** Provide guidance to New Jersey Future staff on methodology to get input from members regarding the health of the collaborative. Address issues such as ability to compromise, shared vision, group legitimacy, etc. The proposed method involves use of the [Wilder Collaboration Factors Inventory](#).

*Deliverables/Timeframe: Guidance on how to assess members and needs. Development of an interview process, email survey, or other simple assessment method, and recommendation on how to administer. Report on findings. This could be introduced at the July meeting, administered immediately afterwards, and results prepared within three weeks.*

- e. **Guidance on development and execution of branding process, website, and communications platform.** Identify critical issues related to equity and collaboration and help facilitate a process for including members in the communications and branding initiatives. The consultant will advise staff throughout this process, which will include establishing an independent name, logo, and style guide for the movement; creating a new public-facing website and member-oriented digital platform; creating a protocol and process for regular communication; and establishing new lines of communication and ways for more individuals and organizations to participate. (New Jersey Future will hire a separate communications and marketing consultant to produce the new brand and execute the platform.)

*Timeframe: April and May, including some input/discussion at late April membership meeting and mid-March steering committee meeting.*

- f. **Guidance on meetings, communications, and selected activities.** Work collaboratively with staff by providing coaching on equity accountability procedures.

January 19, 2021

Provide continual feedback to staff and members on their application of established norms related to collaborative/equitable decision-making and action.

*Timeframe: Ongoing through August 2022.*

### **Schedule for Selection of Consultant**

1. *Deadline for receipt of proposals:* March 5, 2021 at 5:00 p.m.
2. *Virtual interviews:* through March 12, 2021
3. *Notification of selection:* by March 15, 2021
4. *Work begins:* Immediately, subject to consultant's schedule

### **Preliminary Proposed Project Schedule**

#### **March**

- o Begin work by meeting with staff to discuss the mid-March steering committee meeting, leadership structure, local capacity building model, and 17-month work plan.
- o Steering committee meeting in mid-March. Present overall effort to the group.
- o Work with staff to plan April membership meeting, with components on measurable goals and objectives, branding, and communications platform.
- o Deliverables:
  - Recommendations on leadership structure and local capacity building model.
  - Work plan through August 2022.

#### **April**

- o Advise staff on options and outcomes for branding effort and communications platform, as well as how to engage collaborative members in their development.
- o Attend membership meeting. Facilitate components on measurable goals and objectives, branding, and communications platform.

#### **May**

- o Attend steering committee meeting. Review branding and communications platform and ensure that measurable goals and objectives are being met.
- o Provide input on planning for June community training session. Advise staff on communicating with community groups regarding the training.

#### **June**

- o Attend community training session, and possibly facilitate a session on centering advocacy efforts in equity.
- o Help staff plan membership meeting.

#### **July**

- o Attend full membership meeting and introduce membership surveys

#### **August**

- o Assist with review of membership surveys.
- o Attend steering committee meeting and report on survey results.
- o Continue advising on collaborative processes, communications, upcoming meetings.

January 19, 2021

**September**

- o Help staff plan membership meeting.
- o Attend community training session.

**October**

- o Attend full membership meeting and report on survey results.

**November**

- o Attend steering committee meeting. Continue to ensure that measurable goals and objectives are being met.

**December**

- o Review 2022 work plan. Provide staff with suggestions for improving processes.

**Attendance at Meetings**

- New Jersey Future will ask for monthly virtual meetings with the consultant (until it is safe to return to in-person meetings at its Trenton office) and regular phone calls in the interim.
- During 2021, the consultant will be asked to attend quarterly membership meetings and four steering committee meetings. It is likely that these meetings will be virtual at least the first half of the year.

**SUBMISSION REQUIREMENTS**

**Proposal specifications:**

All proposals should include:

- A basic statement of qualifications, including experience, background, skills, and degree of expertise in the specific areas outlined in this RFP.
- At least two references that address applicant's successful relevant experience in working with large, collaborative initiatives, and in facilitative leadership.
- Financial proposal for the project, in the range of \$7,500 - \$10,000 for March - July 2021 and \$10,000 - \$12,000 for Aug - July 2022, including total work hours and hourly rate schedule to perform this work.
- Any other relevant contractual language. The successful firm's final proposal will become part of any signed agreement.

The proposal shall be submitted, via email, to Jael Davis at [jdavis@njfuture.org](mailto:jdavis@njfuture.org), by March 5, 2021, at 5:00 p.m.

This request for proposals does not commit New Jersey Future to engaging the services of any firm for any of the items either within or outside the outlined scope of work.

**Resources:**

- <https://www.njfuture.org/issues/> for an introduction to New Jersey Future's work
- Lead-Free NJ Draft Description and Proposed Structure (available upon request)
- Policy Reports:
  - o [New Jersey Lead Poisoning Prevention Action Plan](#) (2018): A report issued by a group of New Jersey's leading health, housing, and community development

January 19, 2021

advocates that details strategies to eliminate childhood lead poisoning in New Jersey in 10 years.

- o [Lead in Drinking Water Task Force Recommendations](#) (2019): A report issued by the Jersey Water Works' 30-member Lead in Drinking Water Task Force, which recommends actions New Jersey can take to virtually eliminate lead in drinking water in 10 years.

**Questions:**

Please contact Jael Davis at [jdavis@njfuture.org](mailto:jdavis@njfuture.org) with any questions or requests for additional information.