



Louise D. and Morton J. Macks

Jewish Connection Network

An agency of The Associated

Request for Proposal: Strategic Planning Consultant

Organizational Overview

The Louise D. and Morton J. Macks Jewish Connection Network (AKA “The Network”) seeks to empower and support individuals to explore their own Jewish journeys—inspiring them to form lasting connections to a diverse, inclusive and vibrant Baltimore Jewish community. We accomplish this by curating exciting Jewish experiences, facilitating peer to peer connections, and providing and sharing resources for individuals of different abilities and life stages. Our goal is to foster a thriving dynamic Jewish Baltimore where everyone is on a journey and feels a sense of belonging.

The Network was formed in 2022 by combining the engagement programming from two previous Baltimore Jewish Communal Organizations: The Center for Jewish Education and Jewish Volunteer Connection. The mandate for this new organization was threefold: to create flexible, low-barrier on-ramps to Jewish life, help people (specifically those who have been under-engaged or are under-represented in Jewish communal life) find their own entry point to the Baltimore Jewish community, and to be a convener of and partner to the other agencies in the community that do engagement work and are tied to a specific location. Over the past three years, the organization has restructured and developed a new name, brand, mission, vision, and values.

At The Network, we have one key foundational strategy: relationship-based engagement, a systemic approach to centering and building connection, trust, and belonging. It is the act of reaching out to others, getting to know them based on their interests, ambitions and passions, and then weaving relational communities where everyone is seen and uniquely valued. (Source: Gather, inc.) Everyone at The Network is a relationship-based engager, and we are building a powerful relational engine to find and develop authentic relationships with people who are not deeply engaged in Jewish life. In order to reach more people, we engage “Connectors,” compensated volunteers who reach out to individuals and build community with people like themselves. We are utilizing data to inform our strategy and reflect on progress towards our goals.

We plan to run a strategic planning process in fiscal year 2026 (July, 2025-June, 2026) that will clarify the organization’s goals and direction for the next several years. It is time to evaluate if the programs that were brought over from our legacy organizations and modified to meet our new mandate and mission are successful and identify what will be needed, both programmatically and in the organization’s infrastructure, to be an effective and

efficient organization moving forward. We need to understand the extent to which we are currently reaching and engaging the under-engaged members of our community and identify strategies to strengthen our work, which will benefit the entire community. Through this process, we hope to gain a better understanding of our priority population and their engagement needs, explore the effect that The Network can have on Baltimore's Jewish communal system in terms of relationship-based engagement, and develop a fundraising plan to ensure future funding for the organization.

Project Overview and Goals

The Network is seeking a consultant to lead a strategic planning process that will take place during FY2026 (July 2025–June 2026) and result in a plan guiding the organization from June 2026 through June 2030. This process will be driven by a 6-person team of Network staff and lay leaders (“Strat Pack”), with support from the larger Network staff, the board, and an advisory committee composed of Jewish communal leaders in Baltimore.

Through this process, The Network aims to:

1. Gain deeper insight into its **priority populations**, including:
 - Who they are and how to reach them
 - What they want and need—by audience segment
 - Whether current Network programs are meeting those needs and where overlap or duplication may exist
2. Understand how The Network can create **systemic change in Jewish Baltimore** to better serve these populations.
3. Identify opportunities for **individual and institutional fundraising**, in the context of the broader Associated ecosystem.

The consultant will use various modalities—such as a **landscape scan, focus groups, and surveys**—and will collaborate closely with the Strat Pack to analyze findings and develop recommendations for future strategy.

To support this process:

- Strat Pack members have completed a course in strategic planning to ensure readiness.
- Staff will provide background materials including definitions, FY24–FY25 program lists, participant demographics, SWOT analyses, list of related organizations, and the 2020 Baltimore Jewish Community Study.

Additional materials may be identified and shared during the initial engagement period.

Scope of Work and Deliverables

The consultant will be responsible for the following tasks and associated deliverables:

Meetings and Facilitation

- **Kickoff and Check-ins:** Facilitate project kickoff and regular check-ins with the Strat Pack (mostly virtual)
- **Board Retreat:** Facilitate an in-person, day-long strategic planning retreat with the board in January 2026.
- **Advisory Committee:** Advise the Strat Pack on agendas for three advisory committee meetings, which members of the Strat Pack will facilitate.
- **Staff Engagement:** Potentially meet with full Network staff, subject to timing and budget

Landscape Scan

Conduct a comprehensive analysis of how The Network's **audience segments** and **subject areas** are currently engaged by local and national Jewish and non-Jewish organizations. The scan should:

- Identify overlaps with The Network's work
- Uncover market gaps
- Inform questions for focus groups and surveys

Include analysis for:

- **Audience Segments:** Young Adults, Parents, 55+, Jews of Color, LGBTQ+ Jews, Russian Speaking Jews, Secular Israelis, Individuals with Disabilities and Their Families
- **Subject Matters:** Disability and Inclusion, Israel Engagement, Volunteerism, Funder Landscape

Focus Groups

The consultant will plan and conduct qualitative research with key audience segments.

Responsibilities include:

- **Plan and facilitate** 4 focus groups: Young Adults, Parents of Children with Disabilities, LGBTQ+ Jews, and 55+
- **Plan and train facilitators** for 4 additional focus groups: Deaf adults, Russian-speaking Jews, Jews of Color, and Secular Israelis (with the option for consultant to lead these sessions)

Note: The Network will recruit participants and provide incentives for focus group participation.

Partner Conversations

Meet with 8–10 of The Network’s key partners to gather insights into current challenges, partnership dynamics, and future opportunities. The Network team will assist with scheduling.

Family Survey

Support the design of a short (5–7 minute) survey for families involved in The Network to assess:

- Program satisfaction
- Strategy effectiveness
- Unmet needs

Note: Network staff will administer the survey and provide incentives; the consultant will help write the survey, analyze results and incorporate them into the final report.

Report of Research and Findings

Compile all research—including the landscape scan, focus group data, partner interviews, and survey results—into a findings report that:

- Synthesizes key themes
- Includes supporting documents
- Provides information in a format that will support prioritization and internal decision-making

Strategic Planning Support and Development

Based on findings from the research and engagement phases, the consultant will support the development of an actionable, mission-aligned strategic plan that is structured for implementation through FY30. This includes:

- Supporting the Strat Pack in articulating strategic goals that reflect The Network’s priorities and the needs of its target populations
- Recommending organizational structures and capacities needed to support successful implementation
- Leading the development of a strategic plan document that includes:
 - An executive summary
 - Key research findings and themes
 - Strategic priorities and corresponding recommendations
 - A clear roadmap to guide decision-making and organizational alignment

The consultant will also support the creation of a detailed **first-year action plan** to ensure early momentum and measurable progress beginning in FY27.

Communications and Presentation Materials

To support stakeholder engagement and transparency, the consultant will advise and assist in the development of materials—such as a **slide deck or other communications tools**—that present key findings, strategic priorities, and planned next steps. These materials will be designed for use with a variety of audiences, including board members, staff, partners, and the broader community.

Note: The Network can provide graphic design support and will cover any related printing costs.

RFP Process & Strategic Planning Timeline

- RFP Released, *May 30*
- Opportunity to submit questions to amalis@thejewishnetwork.org, *June 13*
- Proposals Due, *June 27*
- Invitations for Interviews sent out, *July 3*
- Interviews, *week of July 14*
- Decision, *July 21*
- Project Start date, *September 2*
- Kickoff meeting with Strat Pack and updated Workplan, *September (Payment 1)*
- Landscape scan and partner conversations, *September & October*
- Advisory committee, *late October (Payment 2)*
- Focus groups and family survey, *November*
- Advisory Committee, *December (research complete. Payment 3)*
- Board retreat, *January*
- Advisory Committee, *February (Analysis phase complete. Payment 4)*
- Prepare final deliverables for *April 1 (5th and final payment upon successful completion of final deliverables)*

Proposal Requirements

Please submit the following in your proposal response:

- A proposal (five pages or less) describing your approach to this project, including relevant expertise in facilitation, qualitative research, and strategic planning. Please also highlight any experience working with, or knowledge of, the priority populations outlined above

- 12 month workplan that includes deliverables, tasks and activities, including acknowledgement of co-dependencies in tasks and how you will manage unforeseen factors (any format acceptable)
- Links to samples of relevant past work
- Contact information for two former clients we can call for references
- Professional bio of person or people involved identifying specific areas of expertise and experience related to this project, including identification of subcontractors or consultants.
- Your proposed budget with costs by deliverable.

Budget: The budget for this project is up to \$44,000, inclusive of all consultant fees and travel expenses. The Network will separately cover the costs of incentives for focus group and survey participants, external facilitator fees, survey software, printed materials, and food for meetings.

Proposals should be submitted to Abigail Malischostak, Director of Operations and Strategy, amalis@thejewishnetwork.org by June 27, 2025.

Contract Terms:

The contract period for services will extend through the end of June 2026.

All materials produced, data collected, and reports generated by the contractor on behalf of The Macks Jewish Connection Network (“The Network”) are considered confidential and will become the sole property of The Network. The contractor may not share or distribute any information provided by The Network or The Associated—including program materials, audience research or data, program data, and participant contact information—without prior written authorization from The Network.

This RFP does not obligate The Network to pay any costs incurred in the preparation or submission of a proposal, nor does it guarantee the awarding of a contract. The Network reserves the right to:

- Accept or reject any or all proposals,
- Negotiate with qualified bidders,
- Cancel this RFP in part or in full at its sole discretion.

The Network also reserves the right to terminate the contract at any time. In the event of termination, the contractor will be compensated for all completed and approved deliverables submitted prior to the termination date.