

REQUEST FOR PROPOSALS

for

Rarticulating the Mission and Vision Statements
Strategic Planning
Restructuring and Financial Planning

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Contact:

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REQUEST FOR PROPOSALS

1. BACKGROUND AND PURPOSE

The Southern Poverty Law Center (SPLC) is a national civil rights organization with offices in five states and the District of Columbia. Over the last several years, our organization has grown substantially. Our operating budget and staff have each nearly doubled in size. And this March, our longtime president and CEO resigned.¹ Now is a moment of change for the SPLC.

As we approach our 50th anniversary in 2021, we are launching a re-visioning process with our staff and Board of Directors to imagine a bold and audacious future. We will have an honest discussion about our role in the social justice and civil rights movements, and how our approach to the work and our theory of change must adapt to the rapidly changing landscape of our democracy.

Not only do we intend to become a 21st century social justice and civil rights organization doing vital work in the communities we serve, we also seek to become a model for other organizations that are grappling with the best ways to incorporate the values of diversity, equity, and inclusion into their internal workplace cultures.

Accordingly, we have initiated a Request for Proposals (RFP) process to identify a qualified vendor(s) to help us:

- A. ***Rearticulate our vision and mission.*** We must be clear about who we are as an organization at this critical moment and what shared values drive our work.
- B. ***Design, facilitate, and help execute a strategic plan to guide our work for the next three to five years.*** We must be clear about the results we seek to achieve, our ability to achieve these results, and how we will hold ourselves accountable for those results. We must be disciplined in our focus and stay on mission and purpose when we consider new initiatives mid-cycle. And, we must be clear about how and when we are uniquely positioned to make a contribution on our own and/or in alignment with key partners.
- C. ***Design and help operationalize a three- to five-year financial, operations, and talent investment plan.*** We must be clear about how we organize our finances, our operations, and our people to achieve our desired results. And we must have a plan for developing and sustaining a workplace that values and embodies diversity, equity, and inclusion in all that we do.

Each one of these tasks will be thought of as individual phases that will occur in the above order. A phase will not start until the previous one is complete. Vendors may bid on one, two, or all of the phases.

¹ We recently launched a search process for a new President and CEO. That search and the three planning phases outlined in this RFP will happen concurrently with our interim President and CEO. We believe our work is too vital to delay taking action until the position is filled with a permanent replacement.

2. WHO MAY RESPOND

The SPLC seeks a diversity of vendors, including but not limited to, minority-owned and women-owned businesses. In addition, we seek vendors who have:

- A. Demonstrated experience integrating diversity, equity, and inclusion principles into their work in order to minimize bias and oppression and address systemic inequities;
- B. Successfully delivered consensus-based strategic plans that involve multiple stakeholders throughout an organization in different locations;
- C. Experience in team facilitation across multiple sites while creatively using technology to bring people together;
- D. Expertise in non-profit strategic planning, budgeting, operations, management structures, board governance and development;
- E. An understanding of the type of legal, programmatic, policy, and advocacy work we conduct; and
- F. A comprehension of and respect for the communities we serve.

3. ABOUT THE SPLC

Founded in 1971, the SPLC is a 501(c)(3) organization dedicated to fighting hate and bigotry through its three program departments:

- A. **Legal.** The legal department advocates on behalf of victims of discrimination and exploitation to bring about systemic reforms through high-impact lawsuits, limited direct representation, public education and advocacy. It has six focus areas: Criminal Justice Reform, Children's Rights, Economic Justice, Immigrant Justice, Voting Rights, and LGBTQ Rights/Special Litigation. Our work is primarily focused in the Southeastern states. In recent years, we have increased our legislative work in Alabama, Florida, Louisiana, and Mississippi.
- B. **Intelligence Project (IP).** In the 1980s and 1990s, we broke new ground suing white supremacist groups, including the Ku Klux Klan. An outgrowth of that work was IP, which tracks and exposes the activities of hate groups. Each year, IP produces a census of active hate groups in the U.S. and almost daily publishes web-based content about hate and extremism. We also monitor the activity of antigovernment extremist groups. Our investigations and research are widely used by lawmakers, corporations, and the media.
- C. **Teaching Tolerance (TT).** TT's mission is to help teachers and schools educate children and youth to be active participants in a diverse democracy. TT provides free resources and professional development to educators who work with children from kindergarten through high school. Educators use its materials to supplement the curriculum, to inform their practices, and to create civil and inclusive school communities where children are respected, valued, and welcome participants.

The aforementioned work is done in close collaboration and support with the following departments:

- Administration/Finance
- Communications
- Creative
- Development/Marketing
- Digital
- Human Resources
- Information Technology
- Security

In 2018, we formed a 501(c)(4) arm, the SPLC Action Fund, to help us more strategically invest in policy and advocacy work, with an interest in possibly engaging in electioneering.

Our operating budget this fiscal year is approximately \$85 million. We have more than 360 staff in 11 offices. Seven of the offices contain staff from multiple departments:

- Decatur, Georgia
- Jackson, Mississippi
- Miami, Florida
- Montgomery, Alabama (national headquarters)
- New Orleans, Louisiana
- Tallahassee, Florida
- Washington, D.C.

There are four additional offices that provide legal services to our clients in nearby immigrant detention facilities in:

- Alexandria, Louisiana
- Folkston, Georgia
- Lumpkin, Georgia
- Ocilla, Georgia

4. SCOPE OF WORK AND DELIVERABLES

We envision a thorough, three-phase process that builds a shared direction for our organization at a moment of internal change. Underpinned by an anti-racism/anti-oppression framework, the following issues must be worked through with the staff, Board Strategic Planning Committee, the full Board of Directors, and vendor in each phase:

Mission and Vision

Help us develop organizational positions for the issues on which we work so that we can better communicate the goals we seek to achieve and, more broadly, our progressive vision for the nation.

Strategic Planning

- Address our “three separate lines of business” problem: Our three program departments operate independently of each other without a clear vision for how they and the staff are all working together toward common organizational goals.
- Develop a unifying framework for departments to annually report on the progress of work, to maintain accountability, and to make adjustments based on changing conditions.

Operations Plan

- Examine the staff structure of each department and recommend changes and additions to promote better organization-wide collaboration.
- Assess the role of the regional offices (offices outside of the Montgomery headquarters) and help us develop a clearly articulated plan for their growth.
- Articulate the Board of Directors’ role, including its committees, in approving the annual budget and mid-year initiatives.

The proposal should include:

Description of Your Organization

- Describe the general nature of your work and how the racial and gender composition of your staff help create greater value, insights, and viewpoints in the work you produce for your clients.
- Provide examples of similar work, along with contact information for organizations you have served.
- Describe the qualifications and experience of staff who will be assigned to this project. Provide a more detailed background of the proposed project manager, including their CV.
- Tell us about a situation where you were failing to meet the client's expectations, why that happened, what you learned and how you were able to successfully change course.

Statement of Proposed Work

- **Methodology:** Detail what your process will be for gathering data on the current state of the SPLC for each phase. If your proposal covers Phase 2, explain your process for leading a strategic planning process and how it will seek to break down silos and encourage the staff and Board members to think about new approaches to our work.
- **Work plan:** Estimate how many hours will be needed to complete this project by phase, propose a timeline, and list what information and people you will need to access.
- **Budget and deliverables:** Provide a detailed budget by phase, description of the specific deliverables that will be produced, and estimated delivery dates.

Minimal deliverables the SPLC expects:

PHASE 1:

1. Revised mission statement, longform vision statement, and position statements on SPLC issues.

PHASE 2:

1. A three- to five-year strategic plan with actionable goals. Each program department will have its own work plan that is clearly aligned with the strategic plan and developed in collaboration with support and operations departments.
2. A memo, dashboard, and/or creative tool detailing how we will internally assess and track our progress, update our plans on a quarterly and annual basis, and measure outcomes.
3. A memo assessing whether the new strategic plan and the revisions to the mission statement will necessitate any rebranding.

PHASE 3:

1. A top-to-bottom assessment of the organizational structure, with recommended changes.
2. A three- to five-year income and expense financial plan that maps out the development of programmatic initiatives, staffing levels, and facilities.
3. An assessment conducted one year after the execution of Phase 3 that evaluates how well we have implemented the changes in all three phases and suggests detailed actions for continuous improvement and learning if we have deviated from our plan.

The vendor will not be able to subcontract any of the work without the explicit, written pre-approval by the SPLC.

We understand that you may need additional information about the SPLC in order to provide a proposal that accurately estimates the scope of work to complete this project. Please join the bidder's conversation on June 25, 2019 at 1 p.m. EDT. Register here: https://zoom.us/webinar/register/WN_U1BUQGfJQNu57HhUP3ke2Q

5. PROPOSAL EVALUATION CRITERIA AND TIMELINE FOR THIS RFP

Responses will be evaluated along several dimensions:

- A. Vendor qualifications;
- B. Understanding and practice of diversity, equity and inclusion;
- C. Work plan and methodology;
- D. Budget; and
- E. References.

We may request one-hour phone and/or video interviews with the intended project manager and their proposed team for a limited number of submissions during the week of July 22, 2019. We will then invite finalists to make an in-person presentation between July 29 and Aug. 9, 2019. We intend to award contracts during the week of Aug. 12, 2019 with an intention to begin our work together on Sept. 9, 2019.

6. PROCESS FOR PROPOSAL SUBMISSIONS

- A. **Closing date:** Proposals are due by 5 p.m. EDT on July 17, 2019.
- B. **Inquiries:** Please direct all questions regarding this RFP to Seth Levi, chief strategy officer, no later than 3 p.m. EDT on June 26, 2019: seth.levi@splcenter.org.
- C. **Conditions of the proposals:** All costs incurred in the preparation of a response to this RFP are the sole responsibility of the bidder and will not be reimbursed by the SPLC.
- D. **Submission instructions:** Proposals must be a single PDF document, no longer than 15 pages, and the file name must include your organization's name. Email them to splcRFP@splcenter.org. Please do not email submissions directly to Seth Levi. Hard copy, mail submissions will not be accepted.