



Request For Proposals

Strategic Plan Consulting Services
Steps to Success, Inc. • P.O. Box 470421, Brookline, MA 02447

PROPOSALS DUE BY: January 9, 2026

Our Mission

The mission of Steps to Success is to promote equity for students from low-income families in Brookline by expanding their horizons, building upon their skills, and supporting their educational journey to maximize their life choices.

About Steps to Success

So much of what there is to learn about Steps to Success (Steps) starts with our student-centered mission. It's why we lead with it—on our website, in conversations with community partners and donors, to the families we serve (and, yes, even in the Request for Proposals we write.) That's how strongly we believe in it.

Since 2001, Steps has served more than 5,000 low-income students from Brookline, providing them with the support they need to thrive throughout their educational journey and beyond. With services and resources like afterschool programs, vacation programs, and camp access, career readiness through paid internships and workshops, and college success through advising, mentoring, and financial aid access, Steps students and their families gain access to the tools they need to “level the playing field.” We know that supporting a student wholly involves multiple points of contact and connection with them and their families, so we partner with local organizations that offer housing and other financial resources. Steps also provides family education, English language classes, and other direct services to close the opportunity gap.

The vast majority of Steps youth live in Brookline public housing. Most are students of color and will be first-generation college students. The truth is that our vital programming helps students overcome the obstacles created by inequitable societal systems and policies. Steps helps students navigate these systemic barriers, helping to close the opportunity gap that exists between low-income students and their higher-income peers. Prior to the creation of Steps, in any given year, only 30-50% of students living in public housing in Brookline matriculated to college. In the last decade, our comprehensive and personalized approach to student support has led to the near elimination of this performance and matriculation gap for students enrolled in our programs.

Our research-driven, student-centered approach makes a significant difference in the lives of young people. We have built deep, trusted relationships with students and their families for almost 25 years— and we love seeing Steps alumni go on to accomplish big, impactful things in this world.

A16-member volunteer Board of Directors governs Steps, with bylaws that allow for that number to be expanded or contracted. The organization has 10 full-time employees, led

by an Executive Director, who are supported by over 35 part-time after-school teachers, assistants, enrichment instructors, and volunteers who staff Steps' out-of-school time activities.

Currently, Steps has launched a \$2 million campaign to expand its programs and address the academic, financial, and mental health needs of the youth and families it serves. This campaign will allow for additional year-round academic and enrichment support, a stronger family resource network, and, notably, program expansion to kindergarten. Early intervention is critical: low-income students often enter school behind in reading, a gap that compounds over time. By ensuring K–2 students "learn to read," Steps will prepare them to "read to learn" in later grades and create the foundation for sustained success. Currently in its "quiet" phase, the campaign has raised just under \$1.2 million from individual donors and foundations to date.

Further information about Steps to Success can be found on the organization's website: <https://www.stepstosuccessbrookline.org/>

Initial Strategic Plan

Steps last underwent a strategic planning process in 2017. The organization began by revisiting and clarifying its core purpose, including its Mission and foundational intentions. Since its inception, Steps to Success has been a three-party partnership of the Brookline Housing Authority, the Public Schools of Brookline, and Steps to Success, Inc. Over the course of a year, that core partnership met eight times as a collective and completed additional independent work to define each partner's role. This process helped clarify how the partners collectively provide wraparound support for the youth and families they serve.

The organization then undertook a comprehensive review of its programmatic model. As a result, it developed its first Theory of Change, presented both in summary form and as a visual graphic. This Theory of Change identifies who the organization serves, the assumptions that guide its work, and the core activities it will prioritize, and it remains a driving document for the organization. It also outlines the short- and long-term outcomes the organization seeks and the measures it will use to evaluate progress. Additionally, a detailed Logic Model was created to support internal planning and guide implementation.

As a result, the organization established its core strategies, including prioritized goals and key tactics, and measurable objectives with timelines and assigned accountability were compiled in an online planning tool accessible to management and the Board.

Project Overview

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead Steps' Board of Directors and staff through a new long-range strategic planning process.

Specifically, Steps is seeking a consultant who will:

1. Work with a Strategic Planning Team, comprised of Board Members, key management staff, and others as needed, to articulate a clear strategic plan for Steps for FY27-FY31. This plan should identify specific strategic, programming, and fundraising objectives for the organization to pursue over the next 5 years in pursuit of its mission, with special focus on aligning new programming with Steps' theory of change.
2. Facilitate all meetings and provide leadership, direction, and expert consultation and advice related to the development of an effective strategic plan, including its successful implementation.
3. Conduct a small scope internal and external survey to evaluate Steps to Success' impact and success in achieving its current goals, plus conduct a general SWOT/SOAR analysis.
4. Develop a timetable of implementation with specific measurable benchmarks, objectives, and tasks to be accomplished to achieve strategic goals. Identify clear, measurable outcomes for how to measure organizational and strategic effectiveness and impact.
5. Establish a framework and process for the organization's leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
6. Deliver a clear, easily consumed, strategic planning roadmap, accompanied by a strategic planning timeline, implementation, and evaluation methodology.

The major questions that the board and leadership are seeking to answer through a strategic planning process are:

- Is the organization's Theory of Change still effective and/or relevant? Are we still achieving our mission?
- To what extent does Steps know and understand the needs of the population we serve?
- What are Steps' key programmatic interventions, and how does it continue to grow and develop them?
- Does Steps' program model need to change to meet its long-term outcomes? If so, how?

- What are the next iterations of Steps' programs and organizational structures, in terms of the funding, staffing, technology, data systems, and evaluation, etc., needed to achieve its identified outcomes sustainably?
- What is the current status of the partnership with BHA and PSB? Are the roles and responsibilities of each still clearly defined and well-articulated?
- How can Steps better articulate short and medium-term outcomes to demonstrate progress toward long-term outcomes?
- How do we position Steps for long-term financial sustainability in the post-ARPA world? (Please see the previous reference to the current multi-year fundraising campaign.)

Scope of Work

The selected consultant will be responsible for 4 core components of work:

1. An environmental scan that examines internal and external opportunities and perceptions impacting the organization's ability to achieve its mission
2. The development of a sustainable financial and programmatic model to meet its goals and support its mission
3. A thorough assessment of infrastructure needs, including but not limited to physical space, technology, human capital, and financial resources
4. The creation of a 5-year Strategic plan, with a yearly roadmap of objectives and key milestones

Steps is seeking proposals from applicants who are capable of addressing each of the above-stated services and can provide the expertise needed to help the organization and the community it serves achieve a successful project outcome.

Qualifications

The ideal consultant will have:

- A solid understanding of the Brookline/Boston area
- Experience working with diverse populations and a commitment to educational equity and inclusive community practices
- A track record of designing and implementing successful strategic planning processes
- Excellent communication and project management skills

Proposal Requirements

Proposals should include the following:

1. Cover Letter/Executive Summary:

- A brief introduction to the consultant or consulting firm, including relevant experience and qualifications, and a general overview of the proposal

2. Proposed Approach:

- A description of the applicant's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides their work

3. Work Plan and Timeline:

- A clear work plan with key milestones, deliverables, and a specific timeline for the project.
 - i. While Steps to Success understands that the completion of this project will require significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables. The staff will not be expected to be involved in writing work project products or final project deliverables.
 - 1. The proposal should outline which aspects of the project will require Board and/or staff involvement and include the expected time requirement for all activities involving their participation.
- An overview of the check-in points and channels of communication planned to be used to keep Steps abreast of the project's progress toward completion.
 - i. Applicants should include in their project timelines check-in points for Steps to Success to receive project status updates. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/call, sending out meeting invites, providing the work/materials to be reviewed in the meetings, and writing/distributing meeting minutes.

4. Budget:

- A comprehensive budget proposal for the scope of work, including a breakdown of costs.
 - i. This budget should be expressly broken down by each of the 4 aforementioned sections of the scope of work.

5. References:

- Contact information for at least three references from work done with organizations on similar projects within the last 3 years.

6. Sample Work:

- Examples of previous work relevant to this project, including a completed strategic plan.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Demonstrated understanding of the project and the needs of the target population.
- Experience and qualifications.
- Quality and feasibility of the proposed approach.
- Alignment with the Steps' mission and values.
- Cost-effectiveness of the proposal.

Submission Guidelines

- Only bidders who can meet all five metrics in the evaluation criteria section should submit a proposal.
- Proposals must be sent in by January 9th, 2026. We ask that bidders who are interested in submitting a proposal inform Nia Jacobs, Executive Director (njacobs@stepstosuccessbrookline.org) of their plan to do so before December 25, 2025.
- A proposed schedule must be included and clearly expressed.

Target Deliverable Schedule

Final Project Due: June 2026

The goal is to present a strategic plan draft to the Steps to Success board no later than the May 2026 board meeting.

Budget Considerations

Total budget not to exceed \$30,000, including travel costs, fees, and any other expenditures related to the scope of work. Steps is committed to the success of this strategic planning process and is willing to invest in the work needed to ensure it is as successful as possible. That said, as a non-profit organization, every dollar counts. We value the hard work of our partners, and so we also ask that bidders provide a detailed cost breakdown.

Contact Information

For questions regarding this RFP, contact Nia Jacobs, Executive Director, at *njacobs@stepstosuccessbrookline.org* or (617) 713-5310.