The Center on Budget and Policy Priorities (CBPP)

Request for Proposals: Three-Year Strategic Plan (2028-2030)

Request for Strategic Planning Proposals

CBPP is seeking a consulting partner to guide a 6-month strategic planning process in 2027 that will take effect starting on January 1st, 2028. We want a plan shaped by our board, staff and partners, and a plan that we can stand behind for the next three years. In our organizational history, this will be our first collective effort to develop a strategic plan that aligns the board of directors, leadership, and staff members across all of our policy, program, and operational departments and incorporates the perspective and interests of core external stakeholders and partners.

About CBPP

Who We Are

Founded in 1981, the Center on Budget and Policy Priorities (CBPP) is a nonpartisan research and policy institute that advances federal and state policies to help build a nation where everyone — regardless of income, race, ethnicity, sexual orientation, gender identity, ZIP code, immigration status, or disability status — has the resources they need to thrive and share in the nation's prosperity. Equity and inclusion are central to our mission and our work as an organization, reflected in our E&I Values, Vision, and Justice Framework.

What We Do

We combine rigorous research and analysis, strategic communications, and effective advocacy to shape debates and affect policy, both nationally and in states. We work closely with a broad set of national, state, and community organizations to design and advance policies that promote economic justice; improve health; broaden opportunity in areas like housing, health care, employment, and education; and lower structural barriers for people of color and others in communities that continue to face systemic barriers to opportunity. We promote federal and state policies that will build a stronger, more equitable nation and fair tax policies that can support these gains over the long term. We also show the harmful impacts of policies and proposals that would deepen poverty, widen disparities, and worsen health outcomes.

We work on policy implementation at the federal and state levels to maximize the positive impact of policies and bring the lessons learned on the ground back to the policymaking process in Washington, D.C. and state capitals. CBPP's staff are organized into teams focused on federal and state fiscal policy; specific policy areas, including health care, housing, food assistance, income security, and immigration; and operational functions that support our work across the organization. Our policy teams bring together researchers, economists, policy analysts, and advocates, with many other experts working across federal and state policy. Other teams focus on communications, government affairs, partnerships and network support, equity and inclusion, development, and organizational operations, including finance, human resources, and technology. We work with a broad range of state partners, including the State Priorities Partnership, a network of independent state-level policy and advocacy organizations.

CBPP also has an affiliated 501(c)(4) organization, CBPP Action, and is currently exploring its future role and direction. The strategic planning consultant should be prepared to consider relevant findings from that effort as part of the broader planning process.

Our work — rooted in sound research and original data analysis, informed by our extensive knowledge of policy and how programs operate on the ground, and strengthened by our collaboration with a broad range of partners — is trusted by a wide range of researchers, policymakers, and media.

For more information about our history, our impact, and our policy areas, click here.

Strategic Planning Opportunity

Purpose and Engagement Outcomes

The selected consultant will work alongside a working group ("Strategic Planning Committee") comprised of select members of CBPP's Board of Directors, Executive Team (ET), Leadership Group (LG), Middle Management Group (MMG), and bargaining unit staff to co-develop a final scope of work, then lead a planning process that ends with the list of deliverables below.

We see this as a co-creative partnership, and an opportunity for the consultant to identify where the Center can deepen our best work across portfolios, concentrate our strengths and most unique contributions to the broader ecosystem of policy advocates and organizers, and bring internal alignment and visibility to the multiple touchpoints our teams have across program areas. The working group will bring internal knowledge; the consultant will bring expertise in strategic planning, stakeholder engagement, project management, qualitative and quantitative analysis, and facilitation of complex decision-making to drive forward progress. We expect the consultant to draw on existing information and employ appropriate methods such as interviews, surveys, focus groups, and targeted external research to gather perspectives, identify patterns and tradeoffs, and develop clear recommendations. The consultant will also help clarify decision-making roles and responsibilities at the outset, including how input from staff and stakeholders will inform recommendations and final decisions. To that end, CBPP's Executive Leadership with the Board of Directors will retain responsibility for strategic decisions and approval of the final plan.

Given the rapidly evolving policy, political, and philanthropic environments in which CBPP operates, we seek a strategic planning process that will not only establish clear organizational priorities but also strengthen CBPP's ability to anticipate and respond to emerging challenges and opportunities. The process should help us assess where CBPP is uniquely positioned to have the greatest impact, what capabilities and partnerships will be essential to our future effectiveness, and how we can sustain our work over time. Rather than producing a static plan, we want a strategic framework that provides clear direction while allowing the organization to adapt as circumstances change.

Project Deliverables:

1. **A 6-month project plan** for the strategic planning process, including a detailed timeline of all project activities, owners, milestones, and decision points.
2. **Findings from the external scan and engagement with State Priorities Partnership Network partners** including a SWOT or similar analysis to understand the Center's unique contribution to the ecosystem.

3. **Findings from the internal scan** including an assessment of the current state and readiness for deeper org-wide collaboration.
4. **Facilitation materials** to test hypotheses and explore scenario possibilities across staff, leaders, and board towards making final decisions on 3-year org-wide priorities and goals that will shape the Center's work and guide decision-making across departments. This would include criteria for decision-making towards new initiatives and evaluating current program areas.
5. **A Final Strategic Plan in Word and PowerPoint** delivered after final approval from Executive Leadership and the Board of Directors and an initial draft of a funder facing version that will be finalized by CBPP's Development Team and Executive Leadership.

Scope of Work, Stages 1-4

Stage 1: External Engagement Discovery

Stage 1a: External Stakeholder Discovery

The external engagement stage builds a clear picture of where CBPP stands today and what our partners most need from us. We expect the consultant to propose the methodology for collecting data and engaging each group below, such as interviews, focus groups, surveys, listening sessions, and/or secondary research.

Stage	Group	What we want to learn	Equity considerations
Stage 1a: External Engagement	Academia (professors, researchers, etc.)	How they view the rigor and credibility of CBPP's analysis, and where our research could be more useful.	Include scholars at HBCUs, HSIs, and researchers with lived experience.
	Funding partners (current, past and select prospective funders, identified in partnership with the Development Team)	How funding partners perceive CBPP's unique contributions, impact, and opportunities for increased impact; how philanthropic priorities and funding strategies are evolving; and what these shifts may mean for CBPP's long-term financial sustainability, positioning and ability to attract and retain philanthropic support.	Hear from both major institutional donors and individual donors, particularly on CBPP's ability to advance equity and sustain work with under-resourced partners.

Stage	Group	What we want to learn	Equity considerations
	Media partners	How journalists use CBPP's analyses and where we could be a more useful source.	Include outlets serving communities of color, immigrant communities, and local and regional press along with national outlets.
	Policymakers (Federal legislators and/or agency heads)	How they use CBPP analysis and reporting to inform / influence their policymaking and what would be even more helpful.	Engage with policymakers across the political spectrum whose constituents are largely comprised of low income people and communities of color.
	State advocates and people with lived experience (e.g., housing, food assistance and health care access practitioners and/or beneficiaries)	How CBPP is seen in the field, where we add the most value in terms of our programmatic offerings.	Include community-based and grassroots groups; suggestion to offer compensation in accordance with agreed upon guidelines.
	Peer organizations (other large, national multi-issue policy and advocacy organizations e.g., Center for American Progress and Brookings) and national organizing groups (e.g., FRAC, Families USA)	How we are similar to and different from our peer organizations, how CBPP's analysis supports their campaigns, and our unique contribution to the ecosystem.	Consider other peer groups focused on economic and racial justice.

Stage 1b: State Priorities Partnership Network Discovery

We would like the consultant to specifically engage a sample of members of the State Priorities Partnership Network, a national network of independent state policy organizations that work with CBPP to advance equitable state fiscal and economic policies. CBPP plays a central role in supporting the network through policy expertise, technical assistance, capacity building, coordination, convening, and funding. Because the SPP is both a core partner in advancing CBPP's mission and a network of independent organizations with its own priorities and governance, we want to understand how CBPP can best contribute to the network's effectiveness over the next three years. This engagement should explore the unique value-add of the State Priorities Partnership, opportunities for greater collaboration and collective impact, and how CBPP's strategic choices may impact state partners.

Stage	Group	What we want to learn	Equity considerations
Stage 1b: **SPP Network** **Engagement**	State Priorities Partnership (SPP) Engagement	How CBPP can best collaborate with and support the network's strategic priorities and how the impact of our nationwide collaboration is greater than the sum of its parts. We are seeking strategic perspectives from different network structures.	Include organizations with varying levels of capacity, funding, and access to CBPP resources, including those serving historically marginalized communities. Engage a variety of Network structures including the Steering Committee, executive directors group, racial affinity caucuses, etc.

Stage 1c: External Engagement Synthesis & Meaning-Making

We expect the consultant to deliver a synthesis of the external scan, using a SWOT analysis or similar framework to surface areas of strength, gaps, and potential opportunities for the Center to explore, based on a wide variety of perspectives. In particular, we want to better understand our unique contribution to the ecosystem, or our "special sauce" so that we can make more strategic decisions about our programmatic priorities and what to double down on or deprioritize in the future. The external assessment should also identify emerging trends and potential shifts in the policy, political, and philanthropic landscapes that may influence CBPP's work and organizational sustainability over the next three years and beyond. This should include consideration of how CBPP's role, comparative advantages, partnerships, and funding opportunities may need to evolve in response to different external conditions. The consultant should help identify potential opportunities, risks, and strategic choices that would strengthen CBPP's positioning and resilience in a changing environment.

Discovery deliverable: A findings report based on feedback from our external stakeholders with a SWOT or similar analysis to be shared with the Strategic Planning Committee and Center Leadership.

Stage 2a-c: Internal Discovery Phase

Stage 2a: Internal Stakeholder Discovery

The internal stakeholder engagement stage is designed to get a clear understanding of the current state of the organization from the full range of staff, leadership, and board member perspectives. We seek internal Center input at this stage to inform and prioritize the Center's key strategic decisions and directions. Note: this is **not** a full organizational assessment of culture and internal systems, although we welcome back any learnings the consultant would like to make note of. We expect the consultant to propose the methodology for collecting data and engaging each group below, such as through interviews, focus groups, surveys, listening sessions, and/or reviewing pre-existing materials provided by the Center (e.g., department-level goals and plans, annual reports, funder presentations).

Stage	Group	What we want to learn	Equity considerations
Stage 2a Internal Engagement	Bargaining Unit Staff	Insights on how their work contributes to the Center's impact including the most effective strategies and activities, innovative ideas, and experiences with cross-team collaboration toward shared goals.	Offer accessible and anonymous channels; include staff in every department and role in the bargaining unit. For diversity of perspective, engaging with the Center's affinity space members, reflective of diverse racial, ethnic, and gender identities.
	Staff (Outside of the Bargaining Unit)	Insights on how their work contributes to the Center's impact including the most effective strategies and activities, innovative ideas, and experiences with cross-team collaboration toward shared goals.	Offer accessible and anonymous channels; include staff in every department and role out of the bargaining unit. For diversity of perspective, engaging with the Center's affinity space members, reflective of diverse racial, ethnic, and gender identities.
	Middle Management Group (MMG)	Insights on how their work contributes to the Center's opportunities for increased impact, innovative ideas, experiences with cross-team collaboration, and day-to-day experiences. Opportunities to strengthen internal systems / practices to achieve greatest impact & strengthen cohesion across teams.	Surface opportunities where workload, decision-making authority, and collaboration can streamline towards the Center's strategic work
	Cross Policy Coordination ● Policy Leadership Huddle (PLH) ● Cross Policy Meeting ● State Strategies Squad	Leverage ongoing cross-policy discussions and learning to advise on program structure and review learning and planning direction as it evolves.	Consider the collaboration efforts between program and operation staff across these cross-policy areas as well; collaboration overlaps between Comms/Ops/Program staff

	Leadership (Executive Team & Leadership Group)	Opportunities for deeper collaboration across depts, gaining a range of perspectives on where the organization should grow or pull back in order to have the greatest possible impact	Ask how leadership decisions may affect departments with differential access to funding resources as well as how decisions may affect organizational culture and staff well-being across identities
	Board	Long-term direction, governance role in the plan, appetite for risk and growth	Make sure every board member is heard, not only the most vocal

Stage 2b: Internal Stakeholder Synthesis & Meaning-Making

We expect the consultant to deliver a synthesis of the internal scan and share an assessment of where the Center stands today, based on a wide variety of perspectives. In particular, we want to better understand staff perspectives on where the Center can strengthen its impact through refined strategies and activities as well as considering opportunities for innovation. We also want to generate insights regarding how teams can deepen collaboration towards shared goals.

Discovery deliverable: Overall findings on internal perspectives for deeper impact through 3-year goals, strategies, and tactics, and their implications for deeper organization-wide collaboration to be shared with the Strategic Planning Committee and Center Leadership.

Stage 2c: Financial Data Review

While this strategic planning process will not include the development of a detailed financial model or fundraising strategy, we expect the consultant to assess how CBPP's financial position, revenue outlook, and resource constraints should inform its strategic direction and long-term sustainability.

The assessment should consider recent revenue and expense trends, funding concentration, the balance of restricted and unrestricted support, anticipated funding opportunities and risks, and the resources required to sustain existing commitments while pursuing new strategic priorities.

The consultant will work with CBPP's Finance and Development teams to understand the organization's current financial position, fundraising pipeline, and anticipated resource needs, and incorporate these considerations into the evaluation of strategic options.

CBPP will provide recent audited and unaudited financial statements, funding allocations by department, and relevant fundraising pipeline information. Detailed financial projections and fundraising plans will be developed separately by CBPP.

The objective is to ensure that strategic recommendations are informed by financial realities and help position CBPP for long-term organizational sustainability.

Stage 3: Strategic Options, Engagement, and Decision-Making

Using what we learn during the external and internal discovery stages, the consultant will work with the Strategic Planning Committee and Center leadership to develop a set of strategic options and recommendations for consideration. The consultant will then facilitate, using an approach informed by Center leadership and the Strategic Planning Committee, a series of conversations with staff, management, leadership and the board to test these options and gather additional input that will inform the final plan. These dialogues should build on one another so each conversation directly shapes the next.

Org-wide priorities and goal-setting: Facilitate conversations to foster alignment on where we want to be in three years and the impact we hope to have both federally and at the state level through our programmatic work with an understanding of operational implications. As a result of the facilitated sessions, we would like to have a clear roadmap for org-wide decision-making related to implementing the plan. We want a framework for making hard choices about what to emphasize and what to set aside, and an understanding of who benefits and who could be left out by each choice. This should include consideration of how different choices affect the communities we serve, our partners, and the distribution of resources and opportunities within CBPP. We would like to ensure ample space to engage in the operational implications of programmatic decisions prior to final decision-making on the org-wide priorities and goals. The conversations should test clear hypotheses and/or debate a set of possible paths towards a final set of selected org-wide priorities and goals.

The consultant should help CBPP evaluate strategic options in light of plausible changes in external conditions, including changes in the policy and political environment, philanthropic funding trends, and organizational resource availability. The goal is to develop a strategic direction that provides organizational focus while preserving the flexibility to respond to emerging opportunities, risks, and changes in the external environment.

The process should also consider the financial and organizational capacity implications of proposed priorities, including potential investments, tradeoffs, and opportunities to redirect resources. **While CBPP will lead the development of detailed financial projections separately, the strategic plan should provide a foundation for financial planning and resource allocation decisions for 2028–2030.**

We ask that the consultant:

- Propose a mix of in-person and virtual sessions for a hybrid workforce.
- Use facilitation methods that make it easy for quieter voices and newer staff to participate
- The consultant will need to hold an accessibility lens to ensure that accommodations can be made to address a range of staff needs (e.g., sharing materials for advance review prior to facilitated discussions)
- Build in feedback loops so that staff understand how their input has been used
- Based on insights from the internal scan, determine how to best engage staff across levels to ensure broad representation of varied perspectives
- Ensure that operations and cross-programs staff are engaged in these conversations in parallel to policy staff to ensure that operational implications are factored in from the beginning
- Ensure that all leaders, managers, and staff understand their respective roles and contribution towards the final recommendations to the board and that the board is fully equipped for effective decision-making through robust data, analysis, and effective facilitation

Stage 4: Strategic Plan

Key Components:

- Org-wide goals and priorities for 2028-2030, including a launch and Year 1 transition plan, choices about where CBPP will concentrate its efforts, where it may scale back or change its approach, and which capacities and investments will be most important to achieving those goals
- An adaptive implementation and accountability framework outlining how strategic priorities will inform annual planning, budgeting, resource allocation, and organizational decision-making.
- The framework should:
    - Identify key success measures and capacity requirements, organizational ownership and accountability, and a process for regularly reviewing progress and strategic assumptions.
    - Establish a practical approach for monitoring changes in the external environment, identifying emerging risks and opportunities, and determining when adjustments to organizational priorities or approaches may be warranted.
- The intent is to ensure that the strategic plan remains a living framework for decision-making rather than a static document

Formats:

- **Word document:** the full plan, including org-wide priorities, goals, success measures, and implementation notes
- **PowerPoint deck:** a version for presenting to the board, staff and partners
    - **Funder-facing version:** A shorter, polished version tailored to current and prospective funders that explains where CBPP is headed, why it matters and what support it will take.

Note: We expect at least two rounds of review on each draft with the designated point people. The Center will own responsibility for final drafts.

Timeline and Deliverables

We expect the process to run from mid-January to July 2027. We anticipate the Discovery phase to run up to three months, to give each stakeholder enough time to weigh in. Before a final strategic plan is sent to the board, staff will need to see and respond to the draft priorities. Please keep in mind that the board will meet in June and we request the consultant to have a near final draft to share during that meeting.

Deliverable	**Target month**
Final scope of work and engagement plan	Month 1
Stages 1 and 2 in a parallel process: External and Internal Stakeholder Engagement, Secondary Research, and Analysis	Months 1 - 3
Stage 3: Facilitated Decision-Making	Months 3 - 5
Stage 4: Draft strategic plan (Word and PowerPoint) presented to the board for feedback by June 2027 (as described above)	Months 5 - 6
Final plan and draft funder-facing version	Month 6

Proposal Requirements and Submission

Proposals are required to have: A short introduction to your firm and your project team, including the roles played by each team member.

1. 2-3 examples of experience and familiarity leading strategic planning with advocacy/policy organizations in the social impact sector; experience working with organizations of a similar staff and budget size; and experience working with our dynamics of a multi-issue advocacy organization with state partners or affiliates.
2. Your approach to each part of the scope along with any concerns and/or any recommended tradeoffs about the proposed scope or timeline, including recommendations for prioritizing activities to ensure sufficient time for meaningful strategic decision-making.
3. Describe your experience helping organizations develop adaptive strategic frameworks that account for changing external conditions, financial sustainability, and organizational capacity. Please include examples of how you have helped organizations evaluate strategic tradeoffs, integrate financial and fundraising considerations into strategic decisions, and establish processes for monitoring and adjusting strategic priorities over time.
4. Describe your team's commitment to advancing equity and justice and your understanding of public policy's role in advancing equity and justice through examples of your prior work.
5. Describe your philosophy around use of Artificial Intelligence (A.I.) and how it might be used in this engagement (as applicable to your proposed approach), in addition to any explicit use of it in your submitted proposal. We will collaboratively agree on the acceptable use of A.I. for this project with the selected consultant.
6. A proposed timeline with the key deliverable milestones
7. A proposed budget, including fees and anticipated expenses
8. Three references from recent clients, at least one of which is of a comparable size and complexity
9. A proposal in PDF format, no longer than 15 pages

Please note that while the Center does not have a fixed budget for this engagement, we expect proposals to fall within the range of $150k - $175k (including direct expenses).

How we will review proposals

Criteria	**Weight**
Approach and fit with CBPP's goals - Proposed approach to strategic planning clearly reflects the unique needs of CBPP (including the integration of financial sustainability considerations) - Proposals reflect a commitment to and deep understanding of racial and economic justice and how to advance racial and economic justice through public policy - Proposals reflect an understanding of how to synthesize complex qualitative and quantitative data into accessible insights - Proposals reflect ability to synthesize information, distill key insights, and facilitate decision-making in complex contexts	50%

Criteria	Weight
Relevant experience, team, and references - How well do the team's qualifications, experiences, and philosophies match CBPP's goals and needs - Strength of references. (Proposals must include at least three references from recent clients, including at least one organization of a similar size and complexity.)	30%
Budget and value - Proposals reflect a realistic and thoughtful approach to the scope and timeline, including recommendations for prioritizing activities to ensure sufficient time for meaningful strategic decision-making.	20%
Note: The proposed use of Artificial Intelligence is neither a qualifying nor disqualifying factor. The Center is currently in the process of developing its A.I. philosophy and an acceptable use policy. We will align on the acceptable use of A.I. for this project with the selected consultant.	

These criteria and weights will guide our review of proposals, with consideration also given to finalist interviews, references, and the overall fit of the proposed team and approach.

Selection Timeline & Key Dates

Milestone	Date
RFP released	Monday, November 16, 2026
Questions due	Friday, November 20, 2026
Proposals due	**Friday, December 4, 2026 by 12pm EST**
Finalist interviews	December 14-18, 2026
Decision Made	December 22, 2026
Contracting	Early January 2027
Planning process begins	Mid January 2027

Please submit all **proposals** in PDF format to Neriel David Ponce (Subject: CBPP Strategic Planning RFP Submission) via: **contractors@bravaleaders.com. Due date: Friday, December 4th at 12pm EST.**

Please submit all **questions** through our RFP Questions Form here **Due date: Friday, November 20th at 12pm EST.** An updated FAQ will be recirculated to everyone who submits a question, by Wednesday, November 25th.

Frequently Asked Questions (as of November 16, 2026)

Who can apply?

We welcome consulting firms, independent consultants and teams of consultants. We especially encourage proposals from applicants with experience working with policy and advocacy think tanks, experience working with other social impact organizations, with demonstrated experience working with organizations of our size (approx. 150 staff with a $40M+ annual budget).

Can we apply as a partnership or team?

Yes. Please name a lead organization or person who will hold the contract and manage day-to-day work, and describe each partner's role.

What is the budget for this project?

Please note that while the Center does not have a fixed budget for this engagement, we expect proposals to fall within the range of $150k - $175k (including direct expenses). Please list any suggested stipends or honoraria for external participants as a separate line item.

When does the work start, and how long will it last?

We expect the process to begin in mid to late January after the contracting is finalized with CBPP, and run about 6 months, ending with board approval of the final plan by summer of 2027.

Is the scope of work final?

No, the first month is set aside for the selected consultant to work with the Strategic Planning Committee, CBPP's Executive Team (ET) and Leadership Group (LG) to finalize the scope and engagement plan. We welcome ideas in your proposal that would strengthen the approach.

Who will we work with at CBPP?

The Strategic Planning Committee will be your main partner, with a Project Lead and Manager TBD. You will also have regular touchpoints with the Board of Directors and the Center's leadership, and we welcome your recommendation for the frequency of meetings and checkpoints.

Will the engagement be in person or virtual?

We expect a mix. CBPP is based in Washington, D.C., with a hybrid workforce, and our State Priorities Partnership (SPP) organizations are located across the country. Please propose an approach that makes it easy for people in different locations and roles to take part.

Do we need experience with policy or research organizations?

It is strongly preferred, and we will prioritize consultant proposals with this background and experience.

What format should the final deliverables be in?

We need the full strategic plan as a report in Word, a PowerPoint version for presentations with our staff and board, and a shorter executive summary to share with our board and funders. All materials should use plain, accessible language.

How will proposals be reviewed?

Our Strategic Planning Committee members and search partner Brava Leaders will review proposals using the criteria listed above. We will invite finalists to an interview before making a decision.

What is the search process timeline?

Milestone	**Date**
RFP & FAQ released	Monday, November 16, 2026
Questions due	Friday, November 20, 2026
Proposals due	**Friday, December 4, 2026 by 12pm EST**
Finalist interviews	December 14-18, 2026
Decision Made	December 22, 2026
Contracting	Early January 2027
Planning process begins	Mid January 2027

Will we hear back if we are not selected?

We will contact applicants selected to advance to the interview round.