

REQUEST FOR PROPOSALS/QUOTES FOR

Strategic Insights for New Jersey Higher Education: Collaborative Engagement and Outreach

**Issued by:
New Jersey Office of the Secretary of Higher Education**

**Office of the Secretary of Higher Education
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Deadline for Questions: January 31, 2026 by 5pm

Application Deadline: February 16, 2026 by 5pm

Maximum award amounts will not exceed \$304,000.

Table of Contents

1.	PURPOSE AND INTENT	3
2.	MINIMUM QUALIFICATIONS	3
3.	BACKGROUND	3
4.	SCOPE OF SERVICES	3
5.	REQUIRED COMPONENTS OF THE PROPOSAL	5
6.	SPECIAL TERMS & CONDITIONS	8

1. PURPOSE AND INTENT

The New Jersey Office of the Secretary of Higher Education (OSHE) is seeking proposals from qualified vendors to design and implement a national landscape analysis of mergers, consolidations, and acquisitions of higher education with tailored insights based on New Jersey's higher education context. The goal of this project is to help New Jersey examine the complex structure of higher education to ensure it remains sustainable, high-quality, and responsive amid shifting demographic, financial and technological realities.

This project is a part of the State's Fiscal Year 2026 (FY2026) investment in a merger consultant to examine national trends related to higher education and assess relevant state context. As each part of the project will require different expertise and analyses, the State may coordinate activities across all contracted vendors to ensure alignment of key findings and deliverables. The vendor(s) will be expected to engage in cross-vendor meetings to share updates relative to the work underway. Findings from this project will inform the State's long-term vision and serve as foundational insights.

2. MINIMUM QUALIFICATIONS

At a minimum, Bidders must satisfy the following requirement:

Entity is permitted to operate in the State of New Jersey in accordance with N.J.A.C. 18:7-1.9.

3. BACKGROUND

The state legislature has allocated funding to the Office of the Secretary of Higher Education (OSHE) for FY2026 to conduct an independent study on mergers, consolidations, and acquisitions within higher education.

Recognizing the complexities and sensitivities involved, this study is intended to serve as a valuable resource for institutions and policymakers alike. It aims to provide a comprehensive, data-driven evaluation of the current landscape, offering insights into potential paths forward without prescribing specific institutional actions. By examining national trends and incorporating diverse stakeholder perspectives, the study seeks to foster informed dialogue and collaborative decision-making. This approach underscores New Jersey's commitment to supporting academic excellence, fiscal responsibility, and equitable access, ensuring that the state's higher education system remains robust and responsive to evolving needs.

4. SCOPE OF SERVICES

4.1 Identify Stakeholders and Conduct Structured Focus Groups

Vendor shall collaborate with the State to identify and map out the stakeholder groups involved in higher education restructurings, mergers, and/or consolidations. The stakeholder mapping should ensure all relevant voices are represented, including students, faculty/staff, unions, local community-based organizations, legislators and policymakers, local employers, institutional leadership and board members. Critical to this effort will be an understanding of the New Jersey context as well as the stages of a potential merger or other type of innovative partnership. Upon the start of the project, Vendor shall conduct a kick-off meeting with the State for information-sharing on the New Jersey context, as well as to provide an orientation to NJ institutions of higher education.

Vendor shall develop a focus group protocol based on stakeholder mapping and research objectives. The Vendor should conduct structured interviews or focus groups across a representative sample of stakeholders identified. This sample may also include stakeholders who have previously been a part of mergers or consolidations. The focus group protocol should include stakeholder questions related to perceived impacts, needs, gaps, opportunities for innovation, communication, and long-term goals.

Vendor will coordinate logistics and work with OSHE to recruit participants. Interviews should be transcribed and analyzed resulting in a thematically organized report that identifies purpose and methods of stakeholder mapping and interviews/focus groups; overview of representative sample; key findings and themes; and recommendations for both institutional and State leaders. Key to this will be detailing how to best communicate with stakeholders during a merger/consolidation, and what information should be provided.

4.2 Conduct an Equity Impact Assessment Across Different Merger/Consolidation Scenarios

The State wants to utilize a structured process to identify how different merger or consolidation scenarios may impact different groups, particularly by race, ethnicity, socioeconomic status, and geography. The Vendor should utilize the stakeholder mapping to analyze potential impacts – both short- and long-term, across stakeholder groups.

The equity impact assessment should detail how to provide continued and fair service to students, faculty and staff, throughout a merger. This should include, but is not limited to: academic freedom, fair labor practices, tenure processes, teach-outs, transfer processes, cost safeguards, athletics, and continued student services. This should also include analyzing second-order effects, such as accreditation, enrollment behavior shifts at non-merged institutions, labor market implications.

Vendor will supply a final equity impact assessment detailing the potential impacts across stakeholder groups and recommendations to mitigate disparities and monitor for equity moving forward, as well as a fully modeled ‘no structural change’ baseline. Vendor should also include explicit decision points and defined exits based on potential impact.

4.3 Produce Engagement Report and Public Briefing Materials

Based on the activities listed above, the Vendor shall provide a final report regarding an overview of the work conducted, a synthesis of stakeholder engagement themes, list of guiding principles to consider during a review process, and recommendations and strategic considerations related to this issue for the future of higher education, including other state and local policies that may be impacted during a merger, potential misinterpretations and communication vulnerabilities. This should also include 3-5 explicit disqualifying conditions or defined exit points.

The report should also include public-facing documents regarding the findings, including fact sheets, slide decks, and FAQ documents, to help report out key findings and promote transparency and relationship building with stakeholders involved in this study. These documents will be used for accountability and to inform future State and institutional processes and policies, including the upcoming higher education strategic planning process.

4.4 Timeline and Standards

All activities outlined in this document for the **Strategic Insights for New Jersey Higher Education: Collaborative Engagement and Outreach** initiative (Initiative) must be completed within one calendar year of the effective date.

Vendor shall have biweekly meetings with OSHE to discuss any issues that may need to be resolved and to keep OSHE apprised of the progress of the project. Vendors may be asked to meet with other partners conducting relevant work, as well as utilize final deliverables from related projects to inform their work. Vendor must provide regular reporting of progress and metrics, as well as reporting of expenditures.

At project kickoff, the Vendor shall submit an initial workplan that includes a detailed, week-by-week schedule aligned to the proposed timeline and deliverable due dates. The work plan shall describe the Vendor's approach to executing the scope of work, including key tasks and subtasks, sequencing of activities, roles and responsibilities, coordination points with the State and other partners, data dependencies, and interim milestones, and shall clearly demonstrate how proposed activities align with the project timeline and deliverables. A finalized workplan incorporating feedback from the State shall be submitted no later than ninety (90) days after the start of the engagement.

Upon commencement of the engagement, the Vendor shall develop a RACI chart in coordination with the Agency to define roles, responsibilities, and decision authorities across project participants; the RACI shall be treated as a working document, made available within the first ninety (90) days of the engagement and updated as additional stakeholders join the evaluation.

The Vendor shall budget adequate time for cross-vendor coordination, with an expected cadence of at least monthly meetings, and the RACI chart shall identify the Agency's designated authority for resolving analytic conflicts that may arise across varying project scopes.

All deliverables shall be submitted in formats appropriate to the nature of the product (e.g., Word documents, presentation decks, data appendices, or other agreed formats), with page lengths and levels of detail that are reasonable and proportional to the scope of the deliverable.

Drafts, working documents, and final submissions must be clearly labeled, and final deliverables shall be prepared to a standard suitable for public consumption, including clarity, readability, and accessible presentation of findings.

The State shall be afforded a standard review period of ten (10) business days for each draft deliverable, unless otherwise agreed in writing.

5. REQUIRED COMPONENTS OF THE PROPOSAL

5.1 General Information

All Bidders shall provide brief but concise responses to the following prompts. Appendices can be used for additional general information as necessary.

- A. Narrative – Bidders shall provide an overview of how the services detailed in the scope of work will be implemented and the timeframes involved, specifically addressing the following:
 - (a) Explanation of how the Bidder's services satisfy the requirements of the Strategic Insights for New Jersey Higher Education: Collaborative Outreach and Engagement as stated in the Scope of Work above.
 - (b) A detailed proposal with a person/hour and staff classification mix to meet the scope of work describing how Vendor intends to accomplish each component of the Scope of Work.
 - (c) A detailed budget to perform the Scope of Work.
 - (d) A schedule identifying the deliverables to be submitted.
 - (e) Identification of any potential conflicts of interest regarding the delivery of services for the scope of work.
 - (f) Explanation of how Vendor will transfer analytic capabilities and allow for use of deliverables independently after contract end.
- B. Organizational Commitment and Capacity -- Bidders shall describe their commitment to addressing the conditions and/or needs identified in this document, including the organizational support that exists for implementing the activities associated with the Initiative. The Bidder should describe its experience with providing technical assistance, serving adult learners, and collaborations with stakeholders as would be required for the Strategic Insights for New Jersey Higher Education: Collaborative Outreach and Engagement. Additionally, information regarding Bidder's current organizational capacity should be included to evidence an ability to fulfill the requirements set forth in this document.
- C. Budget Summary - Bidders shall provide a budget summary detailing the estimated administrative costs of managing the Strategic Insights for New Jersey Higher Education: Collaborative Outreach and Engagement a general staffing plan, and timeline.
- D. Particular consideration will be given to Bidders with a presence in New Jersey. Please provide any information relevant to this consideration.
- E. Any other information that uniquely qualifies the Bidder to contract with OSHE for the Strategic Insights for New Jersey Higher Education: Collaborative Outreach and Engagement.

5.2 Additional Information

Bidders need to register with NJSTART.gov. Bidders who are already registered with NJSTART must provide their vendor ID number.

- (a) A copy of a valid New Jersey Business Registration must be submitted by all Bidders. To facilitate proposal evaluation and contract award process, the Bidder shall submit the Business Registration form with the proposal. If not already registered with the New Jersey Division of Revenue, registration can be completed online at the Division of Revenue website: <https://nj.gov/treasury/revenue/gettingregistered.shtml>.
- (b) Pursuant to Public Law 2005, Chapter 51 (Chapter 51), to avoid any appearance that the selection of State Contractors is based on the Contractors' political contributions, State departments, agencies and authorities are precluded from awarding contracts exceeding \$17,500 to vendors who make, or have made, certain political contributions on and after October 15, 2004. Chapter 51 also requires the disclosure of all contributions to any political

organization organized under 26 U.S.C.A. 527 that also meets the definition of a continuing political committee within the meaning of N.J.S.A. 19:44A-3(n) and N.J.A.C. 19:25-1.7. Bidders shall submit the required certification form(s) and disclosure form(s) with their proposals. Failure to submit such forms and/or failure of such forms to evidence compliance with Chapter 51 shall be cause for rejection of a Bidder's proposal. Any Bidder selected shall maintain compliance with Chapter 51 during the term of its engagement. The disclosure form can be found at: <https://nj.gov/treasury/purchase/forms.shtml>.

- (c) Pursuant to Public Law 2005, Chapter 271 (Chapter 271) Bidders must disclose their (and their principals') political contributions within the immediately preceding twelve (12) month period. No prospective firm will be precluded from being awarded a contract by virtue of the information provided in the Chapter 271 disclosure provided the form is fully and accurately completed. Prior to formal appointment the firm anticipated to be selected will be required to submit Chapter 271 disclosures. To facilitate proposal evaluation and contract award process, the vendor shall submit the Chapter 271 disclosure with the proposal. The disclosure form can be found at: <https://nj.gov/treasury/purchase/forms.shtml>.

Please also be advised of your responsibility to file an annual disclosure statement on political contributions with the New Jersey Election Law Enforcement Commission (ELEC), pursuant to

N.J.S.A. 19:44A-20.27 if your firm receives contracts in excess of \$50,000 from a public entity during a calendar year. It is your firm's responsibility to determine if filing is necessary. Failure to file can result in the imposition of financing penalties by ELEC. Additional information about this requirement is available from ELEC at (888) 313-3532 or <https://www.elec.state.nj.us/>.

- (d) In accordance with Public Law 2005, Chapter 92, all services performed pursuant to this RFP shall be performed within the United States of America.
- (e) Pursuant to Public Law 1995, Chapter 159, effective January 1, 1998, and notwithstanding the provision of any other law to the contrary, whenever any taxpayer, partnership or S corporation under contract to provide goods or services or construction projects to the State of New Jersey or its agencies or instrumentalities, including the legislative and judicial branches of State government, is entitled to payment for those goods or services at the same time a taxpayer, partner or shareholder of that entity is indebted for any State tax, the Director of the Division of Taxation shall seek to set off so much of that payment as shall be necessary to satisfy the indebtedness. The amount set-off shall not allow for the deduction of any expense or other deduction which might be attributable to the taxpayer, partner, or shareholder subject to set-off under this Act.

The Director of the Division of Taxation shall give notice of the set-off to the taxpayer, partner or shareholder and provide an opportunity for a hearing within thirty (30) days of such notice under the procedures for protests established under N.J.S.A. 54:49-19. No request for conference, protest, or subsequent appeal to the Tax Court from any protest shall stay the collection of the indebtedness.

- (f) **CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES IN IRAN**

Pursuant to N.J.S.A. 52:32-58, the Bidder must certify that neither the Bidder, nor one of its parents, subsidiaries, and/or affiliates (as defined in N.J.S.A. 52:32-56(e)(3)), is listed on the Department of the Treasury's List of Persons or Entities Engaging in Prohibited Investment Activities in Iran and that neither is involved in any of the investment activities set forth in N.J.S.A. 52:32-56(f). If the Bidder is unable to so certify, the Bidder shall provide a detailed and precise description of such activities. The certification form can be found at: <https://nj.gov/treasury/purchase/forms.shtml>.

- (g) A copy of a Disclosure of Investigations and Other Actions Involving the Vendor Form must be submitted by all Bidders. The certification can be found at:

<https://www.state.nj.us/treasury/purchase/forms/DisclosureofInvestigations.pdf>.

- (h) The Terms and Conditions set forth in Attachment 1 – OSHE Terms & Conditions, are material terms of any contract resulting from this request.

5.3 Cost liability

OSHE will not be responsible for any expenses in the preparation and/or presentation of the proposals or for the disclosure of any information or material received in connection with the solicitation, whether by negligence or otherwise.

6. SPECIAL TERMS & CONDITIONS

6.1 Term

The term of the Contract entered pursuant to this Request shall be for the Strategic Insights for New Jersey Higher Education: Collaborative Outreach and Engagement through one calendar year of the effective date.

6.2 Termination

Unless otherwise provided herein, OSHE reserves the right to terminate any Contract entered into as a result of this Request provided written notice has been given to Vendor at least thirty (30) days prior to such proposed termination date. At Contract termination, Vendor must cooperate fully with OSHE and the new contracted vendor to enable a smooth transition.

At the end of the Term, Vendor shall remit a report to OSHE providing a full accounting of any monies remaining. Any unexpended monies received from the State shall be returned to the State. Any monies received from private donors shall be applied by Vendor in a manner consistent with State and federal law governing charitable contributions.

6.3 Compliance

Vendor must comply with all local, State and federal laws, rules and regulations applicable to the engagement and to services performed there under.

6.4 Contract

The Contract entered as a result of this RFP will consist of this RFP, addenda to this RFP, OSHE's Standard Terms and Conditions, the Vendor's proposal submitted in response to this RFP, contractual language agreed to by the Vendor and OSHE governing the implementation of the services to be provided, and OSHE's Notice of Intent to Award.

In the event of a conflict between the provisions of this RFP, including the Terms and Conditions, attached hereto as Attachment 1, and any addendum to the RFP, the addendum shall govern.

In the event of a conflict between the Vendor's proposal and the provisions of this RFP, including the OSHE Terms and Conditions, attached hereto as Attachment 1, and including any addendum to this RFP, the provisions of this RFP and the addendum shall govern.

In the event that it becomes necessary to revise, modify, clarify or otherwise alter the Contract resulting from the RFP, amendments will be in writing signed by an authorized representative of OSHE and an authorized representative of the vendor selected as a result of this RFP.

6.5 Open Public Records Act

All documents submitted in response to this RFP are subject to disclosure by OSHE as "government records" under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq. ("OPRA"). A Vendor may assert that specific information is exempted from disclosure under that Act. Vendor will be required to submit a written Commitment to Defend and Indemnify OSHE affirming that they will cooperate in defense of any action filed against OSHE that results from a denial of access based on the requested redactions and/or requests to withhold the documents from release. Upon receiving a request for such information, OSHE will advise Vendor if any such information is not deemed to be exempted. In the cover letter to a proposal, the bidder should clearly state the location within the bid proposal of any information for which the bidder asserts exemption from disclosure under OPRA. OSHE will not honor attempts by bidders or Vendor either to designate their entire bid proposal as proprietary and/or to claim copyright protection for their entire proposal.

6.6 News Releases

Vendor is not permitted to issue news releases pertaining to any aspect of the services being provided under this contract without OSHE's prior written consent.

6.7 Advertising

Vendor shall not use OSHE's or the State's name, logos, images, or any data or results arising from this contract as a part of any commercial advertising without obtaining OSHE's prior written consent.

6.8 Licenses & Permits

Vendor shall obtain and maintain in full force and in effect all required licenses, permits, and authorizations necessary to perform this contract. Vendor shall supply OSHE with evidence of all such licenses, permits and authorizations. This evidence shall be submitted subsequent to the contract award. All costs associated with any such licenses, permits and authorizations must be considered by the Bidder in its proposal.

6.9 Claims & Remedies

A. CLAIMS

All claims asserted against OSHE by Vendor shall be subject to the New Jersey Tort Claims Act, N.J.S.A. 59:1-1 et seq., and/or the New Jersey Contractual Liability Act, N.J.S.A. 59:13-1 et seq.

B. REMEDIES

Nothing in the Contract awarded pursuant to this RFP shall be construed to be a waiver by OSHE of any warranty, expressed or implied, or of any remedy at law or equity, except as specifically and expressly stated in a writing executed by the Secretary of Higher Education of OSHE.

6.10 Additional Work and/or Special Projects

The pricing response in this RFP is intended to be all-inclusive; OSHE anticipates that no additional work or special projects will be necessary. However, OSHE recognizes that changes in federal and state law and regulations over the course of the term of the contract may create additional work required from Vendor.

In the event of additional work and/or special projects, Vendor must present a written proposal to perform the additional work to OSHE. The proposal should provide justification for the necessity of the additional work and the anticipated costs associated with same. The relationship between the additional work and the base contract work must be clearly established by Vendor in its proposal.

Vendor's written proposal must provide a detailed description of the work to be performed broken down by task and subtask. The proposal should also contain details on the level of effort, including hours, labor categories, etc., necessary to complete the additional work.

The written proposal must detail the cost necessary to complete the additional work in a manner consistent with the contract. The written price schedule must be based upon the hourly rates, unit costs or other cost elements submitted by Vendor in Vendor's original proposal submitted in response to this RFP. Whenever possible, the price schedule should be a firm, fixed price to perform the required work. The firm fixed price should specifically reference and be tied directly to costs submitted by the Vendor in its original proposal. A payment schedule, tied to successful completion of tasks and subtasks, must be included.

No additional work and/or special project may commence without OSHE's written approval. In the event the Vendor proceeds with additional work and/or special projects without OSHE's written approval, it shall be at Vendor's sole risk. OSHE shall be under no obligation to pay for work performed without OSHE's written approval.

6.11 Record Retention

All records created as a result of this project shall be retained in their original form by Vendor or in other forms agreed to by OSHE for no less than five years after Contract completion, plus any additional period required by federal or state statutes, regulations or guidelines. At the end of a Contract period, Vendor must be prepared to transfer, in a manner specified by OSHE, all records to OSHE or to the successor Contractor as directed by OSHE.

6.12 Severability

In the event that any provision of this RFP or any agreement executed in accordance herewith shall be held invalid or unenforceable by any court of competent jurisdiction, such holding shall not invalidate or render unenforceable any other provision.

6.13 Right to Waive

OSHE reserves the right to (i) cancel this solicitation; (ii) reject any and all responses to this request; (iii) waive any requirements or minor informalities; (iv) modify or amend, with consent of the submitting firm, any statements; (v) request that all respondents submit additional information not covered by the Request for Proposal which, in the view of OSHE, would be germane to its decision; (vi) negotiate the proposal of the potential provider that, in OSHE's sole discretion, will best meet OSHE's needs; and (vii) affect any agreement deemed by OSHE to be in its best interests or in the best interests of the State.

6.14 Proposal Discrepancies

In evaluating proposals, discrepancies between words and figures will be resolved in favor of words. Discrepancies between unit prices and totals of unit prices will be resolved in favor of unit prices. Discrepancies in the multiplication of units of work and unit prices will be resolved in favor of the unit prices. Discrepancies between the indicated total of multiplied unit prices and units of work and the actual total will be resolved in favor of the actual total. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum of the column of figures.

For comprehensive up-to-date list of State of New Jersey Standard Terms and Conditions: <https://www.nj.gov/treasury/purchase/forms/CombinedStateofNewJerseyStandardTermsandConditionsandWaiveredSupplement.pdf>