



Strategic Planning Consultant Synopsis of Request for Proposals (RFP)

The Housing Network of Rhode Island (HNRI) is seeking proposals to facilitate the creation of a 3-year Strategic Plan. Key goals for the project include:

- Project management
- Design and execute a strategic visioning and comprehensive planning process
- Develop an overarching strategy for sustainable growth that maintains HNRI's focus on strengthening local economies through a broad array of housing development, advocacy, and programming.
- Identify priority areas for growth and development
- Answer key organizational questions
- Engage key stakeholders to clearly define who HNRI is and the direction it should take
- Create actionable, prioritized list of goals, strategies, and activities with recommendations regarding the plan's implementation and support structure
- Potentially update mission, vision, values

The Request for Proposal (RFP) is a tool to help HNRI understand your relevant services and deliverables as it relates to the Strategic Planning process. For purposes of this document, the provider of these services has been defined as The Consultant.

Closing Date: An electronic copy of the completed proposal must be received no later than 3:00 p.m. EST on March 29, 2024

Submit to: mlodge@housingnetworkri.org

Contact: Melina Lodge, Executive Director
phone: (401) 721-5680 ext. 104
mlodge@housingnetworkri.org

To access the RFP or ask questions:

Technical assistance is limited to answering questions regarding clarification of RFP instructions, definitions, or terms.

- To access this RFP and view responses to questions asked, visit www.housingnetworkri.org/about/work-with-us
- Please submit questions via email to hcariati@housingnetworkri.org by February 27, 2024. Please include "RFP Questions" in the subject line.



Table of Contents

About Our Organization.....	3
Who is Eligible to Respond?.....	3
About the Strategic Plan.....	3
Scope of Work.....	4
1. Introduction/Initial Findings.....	5
2. Development.....	6
3. Final Strategic Plan.....	6
Deliverables.....	7
Timeline.....	7
Budget.....	8
Proposals Elements.....	8
Response Submissions.....	8
Additional Information.....	9
Point of Contact.....	9
Minority Business Enterprise and Women Business Enterprise.....	9
Conflict of Interest.....	9
Ownership and Confidentiality.....	9
Rights Reserved.....	9



Request for Proposal (RFP)

Strategic Planning Consultant

About Our Organization

The Housing Network of Rhode Island (HNRI) is the state's membership organization for agencies committed to the development of affordable housing and vital communities. Currently consisting of 17 community development corporations and affordable housing developers, our members have created thousands of affordable housing units and are leading community revitalization and economic development efforts across the state of Rhode Island. Their wide array of activities – including real estate development, financial asset building, housing counseling, resident empowerment and engagement and much more – create tangible community change and transform the lives of Rhode Islanders.

HNRI supports the work of our members through the promotion of public awareness and policies that address Rhode Island's housing and community economic needs. As an organization, HNRI engages in an array of activities, work, and programs to support our mission, strengthen our members, and increase awareness of and support for policies that address Rhode Island's urgent affordable housing needs. Activities include, but are not limited to: convening members and allied organizations, building capacity amongst our members, advocating for policies and programs, and by championing our member organizations as critical partners in the State's efforts to expand the supply of housing. In addition to these activities, HNRI also manages the Down Payment and Closing Cost Assistance Program, the Home Ownership Connection, Homes RI, and the Community Housing Land Trust.

Who is Eligible to Respond?

HNRI seeks consultants with experience successfully developing consensus-based strategic plans who demonstrate a strong overall understanding of the structure and purpose of nonprofit organizations, especially versed in understanding the structure, dynamics, and constraints of a membership organization. The Consultant must have strong facilitation skills, experience creating a neutral environment for, and soliciting input from individuals from various sectors. The Consultant will need experience at gathering and utilizing data to inform the strategic planning process and must have the ability to constructively inspire and engage key stakeholders to think innovatively. Knowledge of the global housing development and homelessness landscape preferred.

About the Strategic Plan

HNRI is at the nexus point of being a recognized leader and expert in the field of housing policy at a time when increased political, social, and economic pressures are requiring a holistic and nimble approach to creating solutions to our nation and state's housing and homelessness challenges. HNRI seeks to embark on a strategic planning process that challenges our board, staff, members, and partners to engage in curious conversations; conversations that will chart a path forward for the organization over the next three years with a clear understanding of the work we should be doing and how we add value to the



Request for Proposals

state's efforts to solve the housing and homelessness crisis. This strategic plan should set a course for implementation and sustainability, tapping into the incredible staff resources that exist, as well as considering what other resources we'll need to achieve our goals.

Scope of Work

HNRI is looking to engage a consultant or group to lead us through a strategic planning process. This effort should focus on assessing and revising—if necessary—the mission, vision, values, and structure of the organization, as well as the development of an actionable plan for the next 3 years. The Consultant will manage the project, designing and executing the strategic planning process. The Consultant will lead the organization in information-gathering, self-assessment, consensus building on plan objectives, and focusing on program and operational priorities for growth and development. The Consultant will support HNRI in answering key organizational questions, including ensuring there is a clear definition of who HNRI is and the direction it should take over the next 3 years. This may include a revisioning of the organization mission, vision, values, and structure. The end product will be an achievable, actionable, consensus-driven three year strategic plan with a prioritized list of goals, strategies, and activities; inclusive of recommendations for implementation and support. The Consultant should be engaging and comfortable with including a diverse array of stakeholders in the strategic planning process.

These efforts should focus on developing the following information into a report with an executive summary that outlines the below sections:

- **Current Operations & Financial Assets**
 - This section needs to detail our current staffing, operations, communications and programming, as well as the financial resources currently available to HNRI. This provides a basis for the future of the organization by detailing where we are coming from.
- **Strategic Positioning**
 - This section looks at the mission, vision, values, and structure of the organization, it should also include our “elevator pitch” of why someone should care about us and what the unique role is that HNRI plays in the Rhode Island housing landscape.
- **Environment (PESTLE – Political, Economic, Social, Technological, Legal and Environmental)**
 - This section looks at the environment in which we operate and focuses on the overall landscape instead of simply what our organization does. This section will assess the climate and environment in the state, nationally, and the network of partners with which we operate.
- **Stakeholder Analysis**
 - This section takes a look at the locus of control (internal vs external) and the intensity (high vs low) of the stakeholders that play a role in the success and failure of our organization. Interviews with stakeholders of all levels should be included— staff, board, state and community partners, donors, volunteers, community members...



Request for Proposals

- Planning
 - This section puts together actionable plans for our operations, communications, programming, and any other area of our organization.
- Leadership Challenges
 - This section looks at the issues that may arise within our leadership and provides recommendations for transition planning and professional development.
- Projected Financials
 - This section looks at the financial sustainability of the organization and the operations over the course of the 3-Year Strategic Plan. Understanding the financial landscape to support our work will provide insights into needs and opportunities.
- Risk Management
 - This section focuses on risks within the organization and plans to move forward outlining those risks and measures that can be taken to mitigate them.
- Short- and Long-Term Goals/Metrics
 - Developing trackable goals and metrics is critical to understanding if the team is on the right path. Strong metrics and goals that define the success of the organization become a critical component to measuring progress. These should be detailed, clearly defined, and with targets— (e.g., not “gain more followers on Instagram” but should have values such as “reach 1,000 followers on Instagram by August”).

While HNRI seeks The Consultant’s recommendations regarding the best path forward to achieve the stated objectives, we envision the scope of work being completed in several stages.

1. Introduction/Initial Findings

- Introductory call/meeting with the Executive Director and The Consultant. The purpose of this call is to gain a broad understanding of the organization, to help draft desired questions that may be asked, to identify potential interviewees and gain an understanding of peer organizations.
- Individual and Group Interviews
 - Typically done in person or via zoom/conference call depending on interviewee’s preference and last about an hour. The intent of these meetings is to gather information on the organization, including perceptions, interests, opportunities and concerns.
 - 4-5 members of staff (inclusive of leadership)
 - 3-4 board members
 - 3-4 member organizations
 - 6-7 others (may be state partners; HomesRI Coalition members, partners and funders; community leaders; community members, legislators, etc.)
 - In addition, a digital survey should be developed that can be shared with a broader audience that will allow us to gain a deeper understanding of the organization.



Request for Proposals

- As the interviews are going on, The Consultant will also be developing an environmental scan on the environment in which we operate and focus on the Political, Economic, Social, Technological, Legal and Environmental landscape in which we operate. These efforts should begin to provide benchmarks for the organization to compare itself against.
- At the end of the interviews, the consultant will draft a summary of the interviews and a landscape within which the organization operates that looks at the community and peer organizations. Consultant should be prepared to present the findings in person or via zoom.

2. Development

- The Consultant will gather the feedback from the Initial Findings Report and Meeting and utilize that to start to draft a foundational plan for the organization.
 - This foundational plan will identify the mission, vision, values, and current operations of HNRI and cross-check it with data gathered on need, desired direction, etc.
 - The purpose of this work is to ensure that the mission, vision, values, and structure of HNRI continue to align in a sustainable way to the needs of the community and are the right work of the organization. If there is misalignment, this document should assist the leadership team in working through alignment and if there is a need for a shift in organizational operations, will provide the blueprint for implementation.
- After ensuring that the foundational plan is aligned, The Consultant will begin to overlay the draft of the strategic plan. Beyond the mission, vision, values, and structure, the draft strategic plan will look at the above-mentioned sections.
- Upon completion of the draft report, The Consultant will host a presentation in person or through zoom with the senior team and desired board members to share the findings.

3. Final Strategic Plan

- Consultant will gather the comments received during the draft strategic plan presentation and implement the desired feedback.
- Consultant will develop any necessary visuals and graphics for the strategic plan.
- Consultant should plan on developing and delivering three strategic plans:
 - A full strategic plan that has great detail and at minimum identifies:
 - shared mission, vision, and values
 - clear guidance on structure of the organization
 - goals
 - objectives
 - strategies
 - tactics



Request for Proposals

- responsible partners and their roles
- measures
- outcomes
- resource development strategies
- initial communication strategies
 - An executive summary with an intended audience of board members, major donors, etc.
 - A presentation format that can be shared broadly with the community or major donors.
- Consultant will present the final strategic plan to the desired senior team/board of directors.

Deliverables

- Initial Findings Report – Made up of information gathered from the interviews, surveys and environmental scan of the community and peer organizations.
- Foundational Plan – Made up of the mission, vision, values, and operations of the organization designed to provide flexibility to respond to emerging issues and accommodate trends in the field and as defined by the housing community.
- Draft Strategic Plan – Integrating in the feedback and information developed from the Initial Findings Report and Foundational Plan the Draft Strategic Plan builds the future of the organization.
- Final Strategic Plan – Delivered in 3 formats (full detail, summary document and a presentation format) this strategic plan identifies the future of the organization and lines up a clear path to success.

Timeline

Below is the anticipated timeline of activities for this RFP:

Activities	Anticipated Date
Issue RFP	February 13, 2024
Questions Due	February 27, 2024
Questions Answered	March 1, 2024
Proposals Due	March 29, 2024
Consultant Selected	April 12, 2024
Consultant planning activities	May 2024



Request for Proposals

Execution of Strategic Plan Activities	May 2024
Strategic Plan Completed	November 2024
Board approval of plan	December 2024
Plan implementation	January 2025

The selected Consultant should anticipate a six-month timeframe for the scope of work and should include a schedule that shows the operations over the course of those six months. If a different period of time is being proposed, the proposing firm should explicitly show why more or less time is needed.

Budget

The current budget for this effort is not to exceed \$35,000.

Proposals Elements

Proposals should include at minimum the following:

1. Summary of the proposal and general description of planning activities.
2. Staffing plan that includes details about your firm/your qualifications and experience as an individual consultant to conduct the scope of work activities. Resumes of all members of the proposed team that will work on the project.
3. Work plan that provides information about the proposed approach to the planning process, activities that would involve key stakeholders, and a clear timeline.
4. Proposed deliverables and the timeline for delivery of each.
5. Proposal of fees in detailed budget; please provide a “not to exceed” bid for the described services and if applicable, projected expenses by line item.
6. References that include the name and current contact information of three references for which you have worked on similar projects, along with work samples or case studies of recently completed work.

Response Submissions

Responses should be prepared in a straightforward manner to satisfy the requirements of the RFP. The response must be emailed in one PDF document, with sections clearly labeled, to Melina Lodge at mlodge@housingnetworkri.org and be received by the deadline indicated in this RFP. Please title the PDF with “RFP: Housing Network of RI Strategic Plan” and the name of your company.

Deadline for the receipt of the proposal is no later than 3:00 p.m. (EST) on March 29, 2024.

Request for Proposals

Late or incomplete submissions will not be accepted. Mail submissions will not be accepted. It is the responsibility of the bidder to ensure that the response is received by HNRI by the closing date and time. A response may be judged and excluded from further consideration if it is not received by the deadline.

Additional Information

The Consultant may provide additional information they feel would assist HNRI in the selection process. The Selection Committee will shortlist the proposals, with respondents potentially being asked for an interview and/or to make a formal presentation to the HNRI board or committee. The selected candidate will be notified and asked to negotiate a final contract. Work would be intended to start in May of 2024

Upon finalization of the contract, HNRI will make current information, research and documents requested available through shared cloud storage. Any other information requested by the selected team will be made available to the best of the ability of the organization.

Point of Contact

Questions should be submitted to hcariati@housingnetworkri.org by February 27, 2024.

Minority Business Enterprise and Women Business Enterprise

HNRI will make efforts to utilize Minority Business Enterprise and Women Business Enterprises. A bidder qualifies as such if it is certified by the State of Rhode Island's Division of Equity, Diversity & Inclusion.

Conflict of Interest

The Consultant agrees that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and HNRI. Any perceived or potential conflict of interest must be disclosed in the proposal.

Ownership and Confidentiality

All intellectual property will become the property of the nonprofit organization receiving services. All data remains the sole property of the nonprofit organization. The Consultant understands the confidential nature of RFPs and agrees to protect it in the same manner as it would its own confidential information, and not disclose Confidential Information to third parties or use the Confidential Information other than as provided for in this Agreement.

Rights Reserved

HNRI reserves the right to reject any and all proposals or to waive any irregularities and omissions if, in its judgment, the best interests of HNRI will be served.