REQUEST FOR PROPOSALS (RFP) FOR STRATEGIC PLANNING – CONSULTANT

Introduction
The Greater Cincinnati office of Local Initiatives Support Corporation (LISC) seeks an experienced strategic planning consultant to facilitate the process to include leading a ½-day retreat and planning session for the board and staff of the organization, resulting in the production of a three-year strategic planning document to guide the strategic investment and implementation priorities for the organization for 2023-2026.

The National Organization
LISC is a national non-profit intermediary organization that assists non-profit Community Development Corporations (CDCs) in their efforts to transform distressed neighborhoods into healthy and safe communities. As a Community Development Financial Institution (CDFI), LISC and its affiliates support community-based partners by providing loans, grants and equity to catalyze investment and impact in under-resourced communities. LISC believes that CDCs are the best vehicles to achieve lasting and positive community change working with resident leadership. CDCs are accountable to local residents and engage in a wide range of physical, economic, and human development activities. By marshaling private sector resources and providing financial and technical support to CDCs, LISC enables residents to set their own priorities and shape the process of community renewal.

About LISC Greater Cincinnati
LISC Greater Cincinnati is focused on affordable housing, economic opportunity, and building the capacity of neighborhoods to support a COVID-19 recovery that addresses racial equity as the foundation of our work.

Through LISC, organizations have access to capacity building, 1:1 technical assistance, and financial resources, including grants, loans, and equity that assist CDCs and other community partners in transforming and renewing their neighborhoods. By providing these and other resources, CDCs are better able to develop affordable housing, vibrant commercial districts, as well as green space such as parks and playgrounds, community facilities, and more.

LISC works with public-private partners who share our mission and through LISC, invest resources to create flexible and innovative programs and products to strengthen neighborhoods.

For more information: http://www.lisc.org/greater-cincinnati/

Scope of Work:
Cincinnati and its partners are interested in scaling efforts to be more impactful and best-position LISC in the market.

LISC Greater Cincinnati and the Local Advisory Committee (LAC) are looking to update a strategic plan that will provide guidance and set the priorities for the local program office. It is anticipated that this planning process will last 4 months. LISC staff will coordinate dates with its members to schedule a ½-day planning session (working lunch w/facilitation in Q1 2023) and two to three additional planning
sessions with the LAC strategic planning subcommittee. During the ½-day session, the consultant will facilitate the discussion with LAC members to determine the priorities and core elements of its strategic plan for 2023-2026.

The LAC is comprised of executive level representatives of Cincinnati area foundations, corporations, and government enterprises, which support community economic development activities, programs, and projects in Greater Cincinnati. The LAC strategic planning subcommittee will provide guidance and oversight to the strategic planning process in partnership with LISC staff.

The planning sessions with LAC members, including one ½ day planning session and two to three sessions with the LAC strategic planning subcommittee, will cover the following areas:

- Review of LISC Greater Cincinnati’s accomplishments
- Connect LISC’s national strategic framework to LISC Greater Cincinnati’s local agenda and priorities
- Assessment of the current local/regional funding environment for LISC Greater Cincinnati office and/or project/program initiatives
- Identify how LISC Greater Cincinnati can optimize LISC toolbox to support strategic initiatives
- SWOT analysis of LISC Greater Cincinnati today (in addition to LAC member input, to include interviews with other intermediaries and similar entities in the market, funders, and client partners)
- Desired future state, goals, and metrics

**Target Audience:**
The plan will be used to communicate to our target audiences including the Local Advisory Committee of LISC Greater Cincinnati, our clients/partners, to include non-profits, CDCs, for-profit partners, small businesses, funders, and investors.

**Deliverables:**
- One ½-day strategic planning session with the members of the Local Advisory Committee (LAC).
- Two to three planning sessions with the LAC strategic planning subcommittee.
- A three-year strategic plan document within the required timeframe (4 months) presented in digital format (word and PDF) with measurable outcomes and timeline, and include the following elements:
  - Identification of strategic issues
  - Statement of strategic direction
  - Prioritized strategic goals
  - Identification of strategies to accomplish goals
  - Articulation of measurable and time-bound objectives and related Implementation strategy
- Present the strategic planning priorities and future state at LAC meeting
- Content for a strategic plan brief or executive summary that may be used for marketing

All materials, notes, planning documents are considered work products to be included as part of this contract.
**Successful candidate:**
This RFP is being issued to consultants with expertise in strategic planning. **Experience working with CDFI's, community development, executive leadership from foundations, corporations and non-profit organizations is preferred.**

LISC Greater Cincinnati is specifically seeking those with proven experience in the following areas:

- ✓ Developing both business plans and strategic plans for non-profit and for-profit organizations
- ✓ Group facilitation
- ✓ Working with non-profit and for-profit boards of directors
- ✓ Working with non-profit and for-profit leaders and managers
- ✓ Developing strategic visions, optimizing an organization’s mission and values to be impactful
- ✓ Conducting a SWOT analysis, environmental scans, and situational analysis
- ✓ Identifying issues, classifying priorities, and obtaining data from stakeholders
- ✓ Formulate long-term and short-term goals and benchmarks for an organization or project strategies

LISC Greater Cincinnati’s strategic plan will result in strategic priorities, connections, and opportunities that position LISC to be successful in Cincinnati and optimize LISC’s toolbox to further inclusive growth in the region/neighborhoods that includes measurable outcomes with timeline.
**Required Proposal Format:**

1) **COVER/FACE SHEET**
This section of the proposal should include the consultant’s name, legal name of the consultant’s business, mailing and e-mail address, phone and fax number, and website if available. It should list the number of pages enclosed with the proposal and it should also include how the consultant heard about the RFP.

2) **STATEMENT OF QUALIFICATIONS**
This section of the proposal should describe the general capacity of the respondent to provide the desired planning and facilitation services. This section should contain the following:

   a. An overview of the respondent’s background, expertise with non-profit and for-profit organizations, and indicate an understanding of general issues that face Greater Cincinnati’s community development organizations (CDOs).

   b. Identification of key individual(s) who will be providing the technical assistance, including a description of their proposed assignments and the skills they bring that are appropriate to the assignments. Please attach a resume for each person who will be involved in this endeavor.

   c. The proposed structure of the technical assistance, particularly the management and capability of carrying out the assignment. Include methodology to ensure knowledge sharing and delivery of the end product.

   d. Availability to complete the scope of work within the specified period (4 months).

   e. The name, addresses, and phone numbers of three references for the respondent, who can comment on the respondent’s qualifications for the technical assistance based on previous experience as clients for the respondent on similar tasks.

3) **TECHNICAL PROPOSAL:**
The purpose of the technical proposal is to outline the design of the assignment. It should include the specific methodology used in the area of business planning for nonprofits, preferably intermediaries and/or CDFIs. **Respondents should also indicate an understanding of general issues that face Greater Cincinnati’s community development organizations and neighborhood conditions that hamper inclusive wealth building and opportunity.**

4) **COST PROPOSAL:**
In this section, the respondent should provide a cost breakdown by deliverable, as well as for the proposed hourly costs of each technical assistance area being responded to, with appropriate explanatory detail and justifying costs and calculations.

**SELECTION PROCESS**
LISC Greater Cincinnati will review all proposals. Submission of a proposal in response to this RFP reflects permission by the respondent for LISC Greater Cincinnati to make inquiries regarding the capacity of the respondent for this task.
CONDITIONS AND LIMITATIONS

1. This RFP is a request for the submittal of proposals, but it is not an offer and under no circumstances will be construed as an offer of a contract.

2. LISC reserves the right to modify or withdraw this RFP at any time, regardless of whether proposals have been submitted.

3. LISC is under no obligation to select any of the proposals it receives in response to this RFP and may reject any or all proposals prior to entering into a written contract for technical assistance.

4. There are no enforceable obligations of any kind against LISC as a result of this RFP.

5. LISC will not reimburse the respondents for any costs associated with the preparation and submission of responses to this RFP or during contract negotiations.

6. Respondents waive all rights to protest or seek remedies regarding any aspect of this RFP, the selection of respondents for negotiations, and the rejection of any or all proposals.

7. All responses to this RFP become the property of LISC.

LISC will maintain a thread of Frequently Asked Questions (FAQs) that will be available upon request.

RESPONSES

Responses to this RFP are due on November 23, 2022 and should be submitted via email to:
LISC Greater Cincinnati
Kristen Baker, Executive Director
Email: kbaker@lisc.org

Respondents must submit an electronic copy (with supplementary attachments) to the email provided above. All submissions must be received by the due date and will not be considered complete until the proposal and supplementary attachments are received.

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