



REQUEST FOR PROPOSALS (RFP)

FOR

STRATEGIC PLANNING – CONSULTANT

Introduction

WeBuild Concord seeks an experienced strategic planning consultant to facilitate a strategic planning process for the next three years (FY 2025 – 2028), including, but not limited to, the facilitation of two mini-retreats (3-4 hours each) for the Board and staff of WeBuild Concord, feedback from community partners and residents, and development of a strategic planning document.

About WeBuild Concord

WeBuild Concord is an affordable housing developer and advocate that builds homes, partnerships for accessibility, and opportunities for the stability and wealth of neighborhoods and residents. We were established as a non-profit by the City of Concord as the Concord Family Enrichment Association (CFEA) in 2019. The original purpose of CFEA was to serve as a conduit for private funding for the City of Concord's Housing Department.

In 2021, the organization's mission changed to focus on broader affordable and workforce housing development throughout Concord and Cabarrus County. After a new strategic vision and community engagement, the organization became fully operational under WeBuild Concord, establishing new affordable housing development tools and a community land trust.

WeBuild Concord has over eighty (80+) single, multi-family, and mixed-use homes and projects completed, under construction, or in development. The total investment in the current development of homes ranges from \$13-15 million dollars.

(Next page)



Goals for Strategic Plan

Because WeBuild has grown rapidly and the need for further resource development, partnerships, and resident needs are expanding, the following goals for the strategic plan have been established:

- Decide on numeric goals for existing and new housing developments through partnerships with private, public, and social sectors.
- Assess the use of current and new tools that provide affordability for residents and its impact on the community and agency.
- If needed, enhance existing strategies and create new ones to accomplish the numeric goals and address access to affordability.
- Develop an overarching strategy for WeBuild that maintains the focus on housing and economic and community development:
 - Housing includes access to grants and low-interest loans for physical development
 - Economic and community development includes integrating our goals and strategies with economic and workforce opportunities.
- Propose ways to enhance community feedback for our operations and housing developments.
- Provide a direction for using mixed-income neighborhoods with other strategies that support our business model.
- Prescribe operational Board and staff patterns that allow for accomplishing goals and access to financial and other resources that support the mission.
- Identify the key partners needed to make the above aspirations possible.

Project Scope of Work

This RFP is for consultants with expertise in strategic planning. Experience working with executive management personnel from foundations, corporations, and non-profit organizations is preferred.

WeBuild 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, understanding an organization's mission, mandates, and values
- ✓ Conducting a SWOT analysis, environmental scan, or situational analysis
- ✓ Identifying issues, classifying priorities, and obtaining data from stakeholders
- ✓ Facilitating the formulation of strategies



- ✓ Developing long-term and short-term goals and benchmarks for an organization or project

WeBuild is requesting a price proposal for this performance-based contract that includes the following:

- The consultant selected for this opportunity will have to be able to evaluate, validate, or help define WeBuild's discrete needs in the planning process.
- In consultation with WeBuild leadership, s/he must propose a relevant and strategic course of action to achieve the organization's short and long-term planning needs.
- S/he must work with the organization, staff, and Board to develop a long-term plan of action (3 years) with measurable outcomes and timelines.
- At the end of the planning process, we require the consultant to deliver a written strategic planning document for the organization to follow for the three-year term. The final strategic plan will 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

(Next page)



Proposal Guidelines and Requirements

We will engage consultants to complete specified tasks or receive satisfactory deliverables by WeBuild. Fees for each task or deliverable include preparation, research, participation in phone calls and meetings with WeBuild and other interested parties (other stakeholders identified by WeBuild), edits of drafts if requested by WeBuild, and other ancillary tasks/work necessary for the completion of the Scope of Work, above. We will grade applicants using a 100-point system outlined below.

1) Basic Information: Max: 10 Points

This proposal section should include the consultant's name, the legal name of the consultant's business, mailing and email address, phone and fax number, and website, if applicable. It should list the number of pages enclosed with the proposal and include how the consultant heard about the RFP.

2) Statement of Qualifications/Technical Proposal: Max: 50 Points

This section of the proposal should describe the general capacity of the respondent to provide the services listed in the Scope of Work. Respondents should also indicate an understanding of general issues that face Concord and Cabarrus County in the Charlotte-Metro area. *Please ensure this section does not exceed four pages in length.* This section should contain the following:

- Describe the approach to the strategic planning process and timeline implementation.
- Include the proposed strategies for a SWOT analysis and environmental scan.
- Facilitation of retreats and other forms of engagement with stakeholders (partners, funders, residents, etc.)

3) Previous Experience Max: 20 Points

- Describe previous strategic planning experience and results (1-2 pages)

4) References Max: 10 Points

- Provide two (2) client references that attest to your experience and results. Provide the name, contact, and type of engagement.

5) Fee Proposal Max: 10 Points

Provide a fee proposal aligned with the abovementioned deliverables that clearly define costs. Indicate rate structure and any cost not incurred in that structure and whether or not



expenses are included. Applicants should include a brief budget narrative to describe their methods for calculation and justification for costs.

Selection Process

WeBuild's Strategic Planning Committee will review all proposals. Submission of a proposal in response to this RFP reflects permission by the respondent for WeBuild to inquire about the respondent's capacity for this task.

Submissions

Responses to this RFP are **due on March 11, 2024, by 5:00 p.m.** Email a PDF of all documents with "**Strategic Plan Submission**" in the subject line to Patrick C. Graham, PhD, at pgraham@webuildconcord.org.

Other Notes:

WeBuild is committed to working with local Small Business Enterprises (SBEs), Minority-Owned Business Enterprises (MBEs), and Women-Owned Business Enterprises (WBEs). WeBuild encourages submissions from SBEs, MBEs, and WBEs.

Intellectual Property. Any reports or other deliverables produced according to a scope of work or contract will be the sole property of WeBuild (except to the extent rights are reserved by the applicable agency).

Compliance with Laws: Consultant shall comply with all applicable laws, rules, regulations, and ordinances relating to the performance of the services, including but not limited to any licensure and registration requirements.

#