

## RFP for Strategic Planning Services

### Summary

ReBUILD Metro seeks a consultant to support the Board of Directors, President, staff, and key stakeholders in a strategic planning process to create a five-year strategic plan to guide the administrative and programmatic direction of the organization. The consultant will work with a Planning Committee – made up of the Board, the President, and the Director of Strategy & Analytics – and other key staff to craft and implement the strategic planning process. The consultant should be comfortable with—and have experience in—devising strategic plans for community development and housing organizations that have a diverse set of stakeholders. The target is to have the strategic plan finalized by the end of November 2021.

### Organizational Background

ReBUILD Metro’s mission is to restore the history and prosperity of neighborhoods by rebuilding homes and fostering enduring community relationships, with a focus on long-distressed neighborhoods in East Baltimore. We rebuild clusters of scattered-site single-family properties into for-sale and rental homes at a range of affordability levels. We supplement these projects by building affordable multifamily developments, storefronts for nonprofits and entrepreneurs, and sustainable parks and greenspaces. We also provide a range of services and resources to help ensure families in our communities thrive, including homeownership training, emergency food resources, and civic engagement opportunities. Through this holistic series of community development programs, we work to ensure that everyone in the communities we serve has a decent and affordable home in a stable and safe environment.

### Goals of Strategic Planning

ReBUILD seeks a strategic plan that serves as a foundation for the next five years. The plan will build from a current strategic plan, which was completed in 2017. Key goals for the planning effort include:

- Develop an overarching strategy for sustainable growth that maintains ReBUILD’s focus on social change and social justice.
- Reconcile ReBUILD’s existing inventory of programs against its long-term financial viability by creating a framework to match mission-based objectives to budgetary constraints.
- Develop a robust diversity, equity, and inclusion strategy to undergird the organization’s decision-making and operating platform.
- Define a theory of change that incorporates 1) the baseline criteria for selecting a neighborhood for ReBUILD’s revitalization and community development programming; and, 2) the conditions which indicate that ReBUILD activity can be wound-down or sunset given the newfound resiliency of selected neighborhood(s).
- Develop a well-articulated model for strategic alliances that enable ReBUILD to effectively utilize the technical expertise of various partners to meet community development objectives.
- Identify other priority areas for growth and development to serve its diverse clients.
- Create prioritized list of goals and strategies.
- For Additional Context and Goals see Appendix A

## Scope of Consultant Work

ReBUILD seeks a consultant who will work with a Planning Committee to craft and implement the strategic planning process. The consultant will lead the organization in information-gathering, self-assessment, consensus on plan objectives, and focusing on program and operational priorities. The end product will be an achievable, consensus-driven five-year strategic plan. The consultant should be comfortable with and have experience in devising strategic plans for non-profit community development and housing organizations that have a diverse set of stakeholders.

## Proposal Process and How to Submit

Complete proposals should be submitted to the Strategy and Analytics Administrator, DeVonya Jones, via e-mail at [devonya.jones@rebuildmetro.com](mailto:devonya.jones@rebuildmetro.com) by Monday, April 12, 2021. Proposals will be reviewed the following two weeks, and proposers may be invited to participate in a brief interview consisting of a subset of the Planning Committee.

The proposal submission must include:

- Cover letter, brief bio(s) of leadership, and relevant work samples;
- Proposal, including 1) a proposed approach to the planning process; 2) general proposed steps and timeline; 3) deliverables; 4) a detailed budget; 5) a description of previous work, paying particular attention to work completed with non-profit community development and housing organizations in planning processes; and
- References

Minority- and Women-Owned Businesses encouraged to submit.

Any questions and requests for further information may be directed to DeVonya Jones at 443-867-2104 or [devonya.jones@rebuildmetro.com](mailto:devonya.jones@rebuildmetro.com).

## APPENDIX A

## **CORE STRATEGIC PLANNING THEMES/ISSUES:**

- Board
  - Roles & Responsibilities – Job descriptions for Board and Committee Members?
  - Membership- What are the long-term roles of Reinvestment Fund, BUILD and Metro IAF?
  - Committees- What Committees do we need and how best to staff and support them?
  
- Management & Operations
  - Johnston Square Redevelopment –what are our goals and objectives?
  - Resilient Communities – what does this mean and why is it important?
  - Expanding Geography- what happens after Johnston Square?
  - Programmatic – what are our core operations and how do we optimize them?
  - Financial Health –how do we deleveraging our balance sheet?
  
- Diversity, Equity, and Inclusion
  
- Leadership Succession Planning

# 2021 Planning Timeline

➤ Identify, Interview and select Strategic Planning Consultants

**March 2021 (Special Board Meeting)**

➤ Kick-off Planning

**April 2021 Board Meeting**

Source documents to be shared with consultant and Board:

- 2017 Strategic Plan
- Organizational Chart
- Board and Board Committees Members & Roles
- Self Assessment-Organizational Status Report (including programs and processes)

Strategic Planning Meetings

**May, July, September 2021 (Special Board Meetings)**

Adopt Final Report & Plan

**October 2021 Board Meeting**

Roll-out and Implement for Strategic Plan

**December 2021 Board Meeting**



This chart is based in Bernard Lonergan's Cognitional Theory- this is a systematic way to understand something new and develop an approach to change or improve a system or idea

## **RESEARCH: UNDERSTAND ORGANIZATION'S CAPACITY AND CULTURE**

Stated Preferences: Interview Staff, Stakeholders, Residents, And Board Members

The Story- What do people in and around the organization say about ReBUILD Metro?

- i. What is the mission?
- ii. What is working/not working and on/off mission?
- iii. What is the organization's notable strength or expertise?
- iv. What tools, training or support is present/absent and necessary for success?
- v. What is the strategy to fulfill the mission?

## **RESEARCH: UNDERSTAND ORGANIZATION'S CAPACITY AND CULTURE**

### Revealed Preferences: Review Documents, Reports, And Data

The Facts- How do documents describe ReBUILD Metro's actions?

- A. Audits
- B. Operating budgets
- C. Operating regular reports & metrics
- D. Organizational policies
- E. Partnership agreements
- F. Property ownership
- G. Staff and resource allocations

## RESEARCH: UNDERSTAND ORGANIZATION'S CAPACITY AND CULTURE

### ReBUILD Metro's Culture: Conversations With Staff And Board Members

The Culture- What do people in the organization believe and value?

- i. How are decisions made (people, process, deliberation, speed)?
- ii. What is held in esteem and what is distasteful?
- iii. What are we afraid to do?
- iv. Who do we want to be?

*“Culture eats strategy for breakfast” – Peter Drucker*

## **ANALYSIS: SYNTHESIZE RESEARCH INFORMATION AND FORMULATE STRATEGIC VISION**

- A. Senior Management needs to document its understanding of ReBUILD Metro's staff and operations
  - i. Cultural norms & aspirations
  - ii. Organizational expertise & limitations
  - iii. Existing commitments and future objectives
  - iv. ReBUILD Metro's aspirations

## **STRATEGY:** BUILD CONSENSUS FOR ORGANIZATION'S NEXT ERA

1. Create 5-year Strategic Plan
2. Establish 1-year **O**bjectives And **K**ey **R**esults (OKRs) That Are Consistent With Strategic Plan
3. Establish 3-year OKRs To Position Assets And Align Staffing To Meet Current Production And 10-year Plan

**ACTION:** IMPLEMENT AND MEASURE USING OKRs. (Then repeat the cycle.)

*“The art of management lies in the capacity to select from the many activities of seemingly comparable significance the two or three that provide leverage well beyond the others and concentrate on them.” Andy Grove*

## Bold And Visionary Work Is Required To Build a Lasting Legacy

The ReBUILD Metro Needs To Balance:

- Open Space With Planned Redevelopment
- Urban Affordable Housing With Income Integration
- Community development with physical development

*“We delight in the beauty of the butterfly, but rarely admit the changes it has gone through to achieve that beauty.” Maya Angelou*

## ➤ Project Financing

- Use of Program Related Investments (PRIs) – deleveraging our balance sheet
- Continued use of LIHTC sponsorship work
- Future use of FHTC or NMTC

## ➤ Programmatic

- Best hope for creating sustainable income integrated community
- Resilient Community – what is the definition of this? What fits and what does not fit?
- Utilize existing assets to establish jobs in construction, property management, development
- Community Planning and strategies needs to be a bettered developed strength
  - GIS/Mapping
  - Market Analysis