



REQUEST FOR PROPOSALS for a Strategic Planning Process

Council of State Community Development Agencies
Washington, District of Columbia

Release: July 31, 2023

Proposals due: August 31, 2023

The Council of State Community Development Agencies is seeking a qualified firm to facilitate the creation of the organization's three-year strategic plan. The consultant will guide the development of a document which produces meaningful objectives with corresponding timeline and deliverables to meet the targeted objectives. Consideration will be given to firms with successful experience and outcomes assisting national non-profit associations in similar projects. COSCDA intends for the plan to be finalized and adopted to begin implementation on July 1, 2024.

ABOUT OUR ORGANIZATION

Established in 1974 as a forum for discussion of and action on national issues of common interest, Council of State Community Development Agencies (COSCDA) is the premier national association advocating and enhancing the leadership role of states in community development through innovative policy development and implementation, customer-driven technical assistance, education, and collaborative efforts. COSCDA represents the leadership role of the states as the premier voice of authority to Congress, federal and state agencies in advocating and promoting community development, disaster recovery, and affordable housing as well as eliminating homelessness, and in providing technical assistance and increasing collaboration among state partners.

COSCDA's Mission:

- Advocate for the common community development goals of the states.
- Develop policies and recommendations on community development issues.
- Keep members informed on federal and state legislative and administrative developments that affect them.
- Enhance the capacity of states to deal effectively and comprehensively with community development issues.
- Ensure the availability of community development expertise to members.

- Encourage and assist states in the development and implementation of effective community development programs.
- Facilitate the exchange of information about programs and achievements among states.

Key Programs & Services: • **Advocacy:** Advocate before key Congressional staff, the Administration and HUD for consistent and adequate resources and policies for key community development, housing, disaster recovery and homelessness programs including COSCDA's Legislative Priorities and state program effectiveness. • **Training & Technical Assistance:** Provide basic program managers training for community development, housing, and homeless programs and enhance peer to peer training and learning. • **Membership/Communication:** Serve as a vehicle to hear from and respond to COSCDA members. • **Strategic Relationship & Coalitions:** Establish coalitions with other national organizations to work on areas of mutual concern and to develop an effective advocacy strategy. • **Organizational Staffing:** Ensure that COSCDA is appropriately staffed and has the resources to carry out its responsibilities.

Operations: COSCDA is governed by a 15-member Board of Directors comprised of four officers (President, Vice-President, Secretary, and Treasurer), along with the immediate Past President, plus at-large members and the representatives elected from each of COSCDA's four regions. The Board is COSCDA's policy-making body, except when policy is made by vote of the members. Policy decisions must fit within COSCDA's bylaws, the vision and mission statement along with the organizational strategic plan. COSCDA employs a staff of 5, including the Executive Director and has an annual operating budget of \$800K. For more information, please visit our website at www.coscda.org.

GOALS & OUTCOMES

COSCDA continues to focus on efforts to promote its growth and advancement in support of its members. Training has been expanded in response to increasing demands of federal programs. The organization added disaster recovery in 2019 in its advocacy and education activities. Further engagement is underway as well to offer more peer-to-peer networking opportunities.

Also, changes are underway in the organization's leadership. New members of the board of directors have been added in recent years. A new executive director will also be announced this fall.

COSCDA looks to the selected party to help it bridge these developments with the creation of a plan to guide its work in the near term. The three-year plan will provide direction on the organization's services, member engagement, and partnerships.

SCOPE OF WORK & DELIVERABLES

The planning process should result in the following:

- Creating an overall vision to accommodate and enhance COSCDA's core member services
- Design and implementation of a planning process aiming to collect widespread and informative response from membership
- Comprehensive strategic plan which includes organization goals by priority with specific action steps, timelines, and measurable outcomes to accompany each
- Identify opportunities for greater assistance and response to member needs
- Proposals for the organization's undertaking of plan implementation and capacity to execute activities
- Offer takeaway questions pivotal to advancing organizational efficiency and accountability

DUTIES & RESPONSIBILITIES

COSCDA will rely on the expertise and guidance of the selected firm to facilitate development of the abovementioned deliverables. However, the consultant is expected to proceed as follows:

- Review available information on COSCDA to understand its current mission and support to members
- Complete planning activities in coordination with COSCDA's leadership (BOD, executive director, and staff) and select committee on the strategic plan
- Create a process for intake and use of feedback from COSCDA's board of directors, committees, and general membership to inform the strategic plan
- Develop a process to collect information from COSCDA partner organizations and contracted affiliates on sustaining COSCDA's core activities
- Lead an in-person strategy meeting with COSCDA's leadership (two days in December 2023) with potential for an additional in-person update on the planning process in March 2024 (both in Washington DC)
- Produce a comprehensive final plan outlining goals, action steps, and recommendations for implementation which will drive COSCDA's work from July 1, 2024 to June 30, 2027; this will include an assessment tool to evaluate success in meeting stated goals

QUALIFICATIONS & SKILLS

COSCD A is seeking firms with successful experience in strategic planning. This may include work with various public and private organizations. Preference is given to a firm which has assisted similar associations of a national scope.

Ideally the successful consultant will have the following skills and qualifications:

- Experience in developing high-quality strategic plans with thorough support from diverse members of an organization
- Demonstrated background in guiding a strategic planning process leading to mutual interests and goals being represented
- Understanding of state governments and their role in supporting community and place-based development with emphasis on small and rural jurisdictions
- Ability to collect and apply data for sufficient use in the planning process
- Budgeting capabilities
- Facilitating communications including marketing and branding
- Encourage active engagement through critical thinking and interactive participation
- Manage all facets of the planning process and provide adequate guidance for implementation

TIMELINE

- Proposals are received by August 31, 2023
- Consultant is selected by September 15, 2023
- Initial meeting between consultant and strategic planning committee/board of directors before October 1, 2023
- Draft outline of planning process submitted within one week of initial meeting
- Planning process gets underway in October 2023
- Information collected from COSCDA membership and other pertinent stakeholders from fall 2023 through spring 2024
- In-person engagements between consultant and COSCDA leadership in December 2023 w. potential for an in-person update to COSCDA's BOD and members in March 2024
- Initial draft of the plan due by April 1, 2024
- Final plan delivered by May 15, 2024

PROPOSAL & EVALUATION

Interested respondents should address the following items in their proposal:

1. General information on the firm, consultants, or collaborative partners contributing to the project. This will include name, position title, address, phone number, and email address of individuals supporting this work. If multiple individuals or groups will facilitate the process, please indicate a lead contact.
2. Supporting documentation outlining qualifications and ability to carry out a strategic planning process for COSCDA. For firms, please include previous work performed and corresponding results aligned with helping organizations in this activity. Individuals contributing to the project should include their resumes which lists previous accomplishments in developing organizational plans, managing group discussions and strategy sessions, and any relevant work with government or non-profit entities emphasizing advocacy, training, and peer-to-peer networking.
3. Examples of strategic planning materials produced by your firm(s). These may include work plans, action steps, and final planning documents. Materials specific to membership organizations are particularly helpful.
4. Three references which can offer feedback on their experiences and success in their strategic planning engagements with firm(s) and/or consultant(s)
5. Draft outline of the firm's proposed actions to facilitate COSCDA's strategic planning process. Please include a timeline with significant checkpoints/goals and individuals responsible for each specific activity.
6. Detailed budget and proposed pay schedule offering a full scope of costs to carry out planning, research, communications, and all other components of the strategic planning process.

Proposals will be evaluated based on the following criteria:

- General information (individuals responsible for the project) 5%
- Qualifications and abilities (demonstrated experience, knowledge, and success in facilitating strategic planning processes for member-based organizations; example materials; references) 45%
- Proposed action plan (outlines proposed steps, benchmarks, and outcomes of the strategic planning process) 35%
- Budget (detailed costs to complete this project) 15%

Proposals will be reviewed by COSCDA's proposal selection committee and executive director.

Any costs associated with development of a proposal will be incurred by the respondent(s) and not expected for reimbursement by COSCDA nor included in the project budget.

Costs incurred by the consultant for participation in in-person meetings will be the responsibility of the firm and should be included in the project budget.

The consultant will oversee and produce a final strategic planning document with approval by COSCDA's leadership by July 1, 2024.

PROPOSAL SUBMISSION

Please submit your proposal to Dianne Taylor, Executive Director via email (dtaylor@coscda.org) by August 31, 2023.

RESPONSIBILITIES and RIGHTS

COSCDA reserves the right to edit, print and distribute written materials used or created resulting from this planning process in a manner that meets its needs.

COSCDA reserves the right to request reasonable improvements or additions to the selected vendor's plans and or budget.

COSCDA will be responsible for arranging facilities, conference organizational and management tasks to accommodate in-person meetings between the consultant/firm and COSCDA leadership/members.

CONFLICT OF INTEREST

The Bidder must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the Contract or the services provided under the Contract. Except as otherwise disclosed in the proposal, the Bidder affirms that to the best of its knowledge there exists no actual or potential conflict between the Bidder, the Bidder's project manager(s) or its family's business or financial interests ("Interests") and the services provided under the Contract.

COSCDA encourages and will consider proposals from Small Business Enterprises (SBEs), Minority-Owned Business Enterprises (MBEs), and Women-Owned Business Enterprises (WBEs).

Any reports or other deliverables produced pursuant to the scope of work or contract will be the sole property of COSCDA.

The 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.

EQUAL EMPLOYMENT OPPORTUNITY

Council of State Community Development Agencies provides equal employment opportunities to all employees and applicants without regard to race (including hair texture and hairstyles), color, religious creed, sex, national origin, ancestry, citizenship status, pregnancy, childbirth, (or related medical conditions, including, but not limited to lactation), physical disability, mental and/or intellectual disability, age, military status or status as a Vietnam-era or special disabled veteran, marital status, registered domestic partner or civil union status, gender (including sex stereotyping and gender identity or expression), medical condition (including, but not limited to, cancer related or HIV/AIDS related), genetic information, or sexual orientation in accordance with applicable federal, state and local laws. COSCDA is committed to maintaining a work environment that is free of harassment and discrimination of any kind and where all individuals are treated with respect and dignity regardless of their race, color, religious creed, national origin, age, gender, sex, sexual orientation, disability, marital status, military veteran status or any other classifications protected by federal, state, or local law.