



**REQUEST FOR PROPOSAL (RFP)
For a
STRATEGIC PLANNING CONSULTANT**

RESPONSE DUE

By 5:00 p.m.

On August 5, 2024

at

HomeRise

**c/o Eileen Myers, Executive Assistant at
emyers@homerisesf.org**

1. SUMMARY AND BACKGROUND

HomeRise is a 501(c3) nonprofit organization, founded in 1990, is dedicated to developing, managing, and providing wrap around resident services in 100% permanent supportive housing, helping people experiencing homelessness secure stable housing and rise up to be the best they can be. We have 18 Permanent Supportive Housing properties all in the city of San Francisco servicing 1600 residents and employing nearly 200 staff.

Our Mission

HomeRise’s mission is to help people experiencing homelessness secure housing and become self-sufficient.

Our Purpose

HomeRise is an outcomes-focused nonprofit that fulfills its mission by developing and managing high quality supportive housing and providing services to individuals, seniors and families experiencing homelessness to help them rise up and rebuild their lives and break the cycle of homelessness. We help thousands of people experiencing homelessness find a permanent home and build a better life. People can improve their health, heal from trauma, cook for their family, find a job, begin paying rent, feel a sense of dignity, and contribute to the community.

Five pillars of our Mission:

HOUSING

Supportive housing helps people experiencing homelessness do more than get off the streets — it helps people rise up and build a better future.

ENGAGEMENT

The experience of homelessness can be isolating and erode one’s sense of hope and trust. Our staff is trained to engage with residents to build trusting relationships and create hope.

CHOICE

Our staff provide non-judgmental support to residents to reduce the harm in their lives, assisting them to make informed choices and stabilize their lives.

EMPLOYMENT

We know that people that have experienced homelessness want to stabilize their lives and go back to work. With the right opportunities and supports, offered by the HomeRise staff, our residents gain employment and become more economically secure.

ADVOCACY & COMMUNITY LEADERSHIP

Our history and work are rooted in community organizing. We are committed to work with our allies to create new solutions and policies that advance our mission and promote social justice, and we work hard to cultivate leadership across the organization—among residents, staff, board, and the broader community.

HomeRise is in a critical time of transition. The organization has grown over the past 34 years and needs to catch up its infrastructure to meet its programming and size. There have been significant financial issues and staffing transitions; HomeRise has cash flow issues; and is under a San Francisco Controllers Office Red Flag Status for fiscal year 2023 and 2024. HomeRise had two rounds of lay-offs in 2023, and has a relatively new CEO and CFO. Within this context, HomeRise has an opportunity to reset and rebuild. This strategic plan will lay the foundation for a new era, ensuring HomeRise is able to stabilize its current operations, prioritize opportunities, and calibrate its business scalability to continue to expand impact in the future.

2. BID GUIDELINES

This RFP will be released on July 8, 2024. Responses will be due no later than August 5, 2024. Responders are expected to submit their responses by email to Eileen Myers, Executive Assistant at emyers@homerisesf.org

For this RFP, HomeRise will be referred to as “the agency” and the applicant as “the respondent.”

3. PROJECT PURPOSE AND DESCRIPTION

HOMERISE EXECUTIVE LEADERSHIP, BOARD OF DIRECTORS, AND KEY STAKEHOLDERS WILL BE CREATING A NEW 3-YEAR STRATEGIC PLAN IN THE FALL OF 2024/WINTER OF 2025 TO GUIDE THE PROGRAMMATIC AND ADMINISTRATIVE DIRECTION OF THE ORGANIZATION. THE AGENCY REQUIRES EXPERT AND PROFESSIONAL CONSULTATION TO LEAD OUR BOARD AND SENIOR STAFF THROUGH THIS PROCESS. THE CONSULTANT WILL WORK WITH A DIVERSE STRATEGIC PLANNING TASK FORCE, MADE UP OF A SUBSET OF BOARD MEMBERS, LEADERSHIP, AND STAFF WHO WILL BE KEY CONTRIBUTORS TO BOTH THE CREATION AND IMPLEMENTATION OF THE PLAN. THE PROCESS MAY INCLUDE THE FOLLOWING:

- QUESTIONS/EXERCISES TO HELP THE AGENCY LEADERSHIP DETERMINE CURRENT SENSE OF KEY PRIORITIES IN THE ORGANIZATION
- REVIEW AND POSSIBLE MODIFICATION OF THE AGENCY’S CURRENT MISSION, VISION, AND VALUE STATEMENTS

4. GOALS OF STRATEGIC PLAN

The goals of the strategic plan are the following:

- Conduct a landscape analysis to understand emerging needs of not only San Francisco, but the 9 Bay Area counties, the ecosystem of resources available to address them, and HomeRise’s relative position within the broader ecosystem.

- Determine HomeRise’s priorities by identifying its strengths, weaknesses, opportunities, and threats (SWOT), with input from critical internal and external stakeholders, including data from a comprehensive feasibility study being performed concurrently with this planning process.
- Create an implementation plan with a prioritized list of initiatives, goals, and tasks with corresponding timeline and budget.
- Develop overarching strategy to ensure a sustainable and impactful organization, which includes a multi-year Fund Development Strategy.

5. PROJECT SCOPE

We expect the project to include:

- Design and facilitation of strategic planning process, including clear communication with and use of the strategic planning task force
- Lead project management throughout the process
- Comprehensive 3-year strategic plan, addressing the goals outlined in this RFP
- Aligned implementation plan and budget

This will include prework with the Board and CEO, and a production of visually attractive plan, which may include:

- A. *EXECUTIVE SUMMARY: AN EFFECTIVE EXECUTIVE SUMMARY THAT INCLUDES MISSION AND VISION STATEMENTS, VALUES, AND OBJECTIVES FOR THE AGENCY. THIS SECTION MAY BE A BRIEF OVERVIEW.*
- B. *AGENCY DESCRIPTION: THIS SECTION OUTLINES THE BUSINESS' HISTORY AND REASON FOR EXISTING. IT CAN ALSO INCLUDE THE SERVICES IT PROVIDES OR RELEVANT BUSINESS ACCOMPLISHMENTS.*
- C. *IF NOT IN EXECUTIVE SUMMARY, MISSION, VISION AND VALUE STATEMENTS: THE AGENCY'S CURRENT MISSION, VISION AND VALUE STATEMENTS, WHICH DESCRIBE WHAT THE COMPANY IS DOING NOW AND WHAT IT MAY ACCOMPLISH IN THE FUTURE.*
- D. *STRATEGIC ANALYSIS: AN OVERVIEW OF THE AGENCY'S STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT ANALYSIS) FROM BOTH INTERNAL AND EXTERNAL PERSPECTIVES. IDENTIFY AREAS WHERE THE COMPANY MIGHT BENEFIT FROM GROWTH AND DESCRIBE ACTIONABLE PLANS FOR EACH AREA.*
- E. *ACTION PLAN: THE ACTION PLAN PRESENTS OBJECTIVES AND PROJECTS. A CLEAR AND CONCISE DESCRIPTION OF HOW THE AGENCY PLANS TO IMPROVE AND DEMONSTRATES QUANTIFIABLE GOALS.*
- F. *BUDGET AND OPERATING PLANS: THE BUDGET PLAN DETAILS RESOURCES AND FUNDING NECESSARY TO ACHIEVE THE STRATEGIC GOALS; INCLUDING THE KPIS AND PROJECTIONS FOR GROWTH THAT THE AGENCY HOPES TO SEE.*

6. PROJECT TIMELINE

Proposals are due by email to HomeRise by 5 p.m. August 5, 2024. Proposals will be evaluated until August 30, 2024, after which all bidders will be notified of their selection or non-selection by September 6, 2024. HomeRise aims to kick off this process by October 1, 2024, and have the plan completed by March 30, 2025, a 6-month process.

7. BUDGET

The budget for this project is not to exceed \$75,000.

8. REQUIREMENTS

Proposals should include the following components:

- Clear articulation of your approach, demonstrating a clear understanding of the work to be performed, and estimated time required by both the consultant and internal partners
- Qualifications and relevant experience of lead consultant and all staff who will support the project
- Time and cost projections

9. BIDDER QUALIFICATIONS

Respondents to this RFP must have at least 10 years of experience in the field of nonprofit management, organizational development, business planning, or a related field. They must be able to present at least 5 examples of previous relevant strategic planning processes and resulting plans. Provide 3 references.



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FAQs

Q: What elements or approaches have been helpful in strategic planning, and what challenges have you encountered? A: Our previous attempt at a strategic plan failed due to lack of engagement. To succeed, we need a fully engaged team, including a Project Lead, who is our Chief of Staff, Karen Erickson. She, along with CEO Janea Jackson, will work with a task force which includes 4 Board members.

Q: Who makes the final decision on strategic direction? A: The CEO is the primary decision-maker, with input from the board task force and the executive team. Our CEO, Janea, employs a collaborative leadership style but retains the final decision-making authority.

Q: Will other staff participate in the task force besides the Chief of Staff? A: The consultant will interview all C-Suite members as part of their data gathering. We aim for broad staff and resident input. It is important for the strategic planning process to be inclusive and transparent. "Champion" staff members will be selected to ensure there is representation from all Departments and at all seniority levels in the taskforce.

Q: Can you share more about the "red flag" status? A: The City uses Red Flag status to identify nonprofits where there is highest risk to continuity of service delivery due to fiscal, compliance, and other management issues. We now have a cohesive team focused on stabilization over the next three years, with a long-term goal of organizational change.

Q: How will staff view this process, and will they embrace it? A: Staff may see it as a prelude to more changes. Our workforce includes second-chance employees and formerly homeless individuals, who may have trauma. It is important to understand this unique dynamic to avoid unnecessarily triggering past trauma.

Q: Will regular updates on the process reduce resistance among staff? A: Yes, it is vital to have champions from the task force to communicate face-to-face, answer questions, and clarify the process with our workforce, formally and informally. Selecting champions with strong communication skills and respect among staff peers is crucial.

Q: Are you looking to revisit mission, vision, and values? A: Yes. HomeRise's financial struggles and the resource limitations of the 100% PSH model may necessitate a business pivot. We aim to explore new business models that may change what products and services we provide. This strategic plan will guide our strategic pivot and help communicate our direction to stakeholders.

Q: What makes your organization unique, and how can we support that niche sustainably?
A: We were founded by grassroots organizations and continue to have Board members and staff who are part of the community. We have community-based nonprofit sensibility.

Q: How do you want to engage staff, partners, and funders in this process? **A:** Wide engagement with other PSH providers, city funders locally and in other 9 Bay Area counties, and foundations is crucial for support. Staff should have multiple touchpoints and opportunities to hear about progress, supported by consultants and well-informed champions who can address concerns and rumors. HomeRise staff should have multiple touchpoints to hear about progress, supported by the consultants and well-informed champions.

Q: Does the proposed structure of having a task force and champions make sense? **A:** Yes, having trusted individuals with rapport among staff communicate the process is ideal. Clear structure and narrative are necessary to prevent misinformation.

Q: What do you expect from bidders regarding examples of previous relevant processes and plans? **A:** We need detailed descriptions and copies of past plans.

Q: You mention that a feasibility study will be done concurrently with the strategic plan. Can you say more? **A:** Timeline and scope are as follows:

This is the business operations feasibility study. See below scope:

Phase One: Preliminary Evaluation

Timeframe: July 9 – Aug 9, 2024

Estimated hours: approximately 40.

Assess HomeRise short-term financial sustainability, and make recommendations for possible actions by HomeRise senior management/Board of Directors

Review:

Corporate organizational charts

Organizational financials

Most recent audits (corporate and property)

Prepared financials to date, corporate and property.

REO schedules and financials

Other relevant outside audits

Discussions with key staff (HomeRise: CEO, CFO, Asset Management; MOHCD asset management)

Verbal Report: Initial report will be verbal, made jointly to HomeRise CEO and MOHCD. Verbal report will include preliminary discussion of options for maintaining organization sustainability, including potential properties for disposition and/or restructuring/recapitalization.

Note: Phase I does not include review of any source documents (such as regulatory agreements, etc.) or written report or analysis.

Phase Two:

Timeframe: Sept 23 – Dec 31, 2024

Estimated hours: TBD

Written summary of Phase I findings and recommendations/options.

Continued analysis/recommendations based on mutual agreement of MOHCD, HomeRise and California Housing Partnership.