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CITY OF RICHMOND,  
COMMUNITY DEVELOPMENT DEPARTMENT

REQUEST FOR PROPOSALS (RFP)

**STRATEGIC PLANNING AND GOVERNANCE ADVISOR FOR  
THE CITY OF RICHMOND AND RICHMOND RAPID  
RESPONSE FUND (R3F)**

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**Today's Date:** March 11, 2022

**Closing Date and Time:** April 11, 2022, by 3:00 PM PST

**Electronic Submittal:** [BidsOnLine](#)

**Contact Person:** Soco Montore, Planning Division  
[soco\\_montore@ci.richmond.ca.us](mailto:soco_montore@ci.richmond.ca.us)

## **INTRODUCTION TO R3F:**

### **About the Richmond Rapid Response Fund**

The Richmond Rapid Response Fund (R3F) was established by the West Contra Costa COVID Community Care Coalition (WCC Care Coalition) during the first month of the region-wide COVID-19 shelter in place order issued in March 2020. Managed by the community and government leaders from the City of Richmond, The RYSE Center, West Contra Costa Public Education Fund (EdFund West), Richmond Promise, Building Blocks for Kids, and the Richmond Rent Program, R3F continues to provide financial support to Richmond residents during the ongoing COVID-19 pandemic and towards community stabilization. Since the R3F began, \$1.4 million has been raised for the Richmond community and over 766 families were served with direct cash grants and 68 families assisted with rent relief. Currently, R3F has entered the third phase of work and seeks a consultant to support it in strategic planning and governance advising to continue to serve Richmond residents in their community vision for stabilization.

The R3F is a new pooled fund with the focus of meeting the critical needs and opportunities facing communities most impacted by the pandemic. R3F seeks to drive investments to Black, Indigenous, and People of Color (BIPOC)-led and rooted nonprofit organizations, movements, and coalitions, creating a pathway for greater Richmond inclusive recovery and community stabilization.

The R3F seeks to build on what it has learned from immediate pandemic response funding and ongoing advice from community leaders and groups who are leading community change approaches. With that in mind, R3F seeks to support community-led approaches changing the racist and discriminatory systems that perpetuate inequities.

#### *R3F's Priority Areas:*

1. Food & Essential Supplies
2. Education & Learning
3. Health & Healing
4. Housing & Homelessness
5. Economic Recovery & Security

#### *R3F's primary initiatives:*

1. Development of direct income pilot and sustainability study for Richmond residents
2. Establishment of rental retention program for the City of Richmond
3. Convening and supporting collective impact projects through the WCC Care Coalition in the aforementioned 5 priority areas

### **Purpose of Request:**

*The City of Richmond and the West Contra Costa Public Education Fund* are initiating a joint Request for Proposal (RFP) process to identify a consultant qualified to design and execute a

strategic visioning and comprehensive and inclusive planning process for the *Richmond Rapid Response Fund*. We are seeking a consultant who can help us center community input to strengthen our strategies and align our plan in the 5 priority areas, and to inform our programs for the next 5 years. As a part of the strategic plan and program design, the consultant will outline an optimal governance framework including transition to an elected board which includes community members and community-based organizations. The consultant will develop the operational plan and timeline for this elected board transition and will create the framework for the voting process.

The overarching goal of this RFP process is to ensure a transparent process that includes feedback from a diverse set of community stakeholders, as is consistent with the R3F's commitment to financial stewardship and community leadership.

### *Planning Needs*

This RFP solicits proposals from consultants with experience designing, supporting, and implementing community-led governance structures and collaborative strategic plans. The ideal consultant will utilize their prior experience to facilitate a collaborative development process that will culminate with a 3–5-year strategic plan covering a minimum of 2023-2026.

The R3F seeks a process that will help to clarify role(s) as a resource for community residents. This includes roles as a convener, grantmaker, advocate, and technical assistant to service providers, power building organizations and more in the WCC Care Coalition and City of Richmond.

### Strategic Plan Goals:

The goals of the strategic planning process are:

1. Develop a vision action plan that captures the programmatic and advocacy aspirations and needs of local community residents.
2. Detail an implementation strategy of short-term, intermediate, and long-term objectives.
3. Design a process that is community-driven, supported and informed by design experts, local government, and other key stakeholders.
4. The adoption of governance structure and bylaws for engaging community oversight and grantmaking

### Objectives:

- Develop framework and strategies for opportunities for community stewardship and accountability. This includes decision making process opportunities in the most impacted people
- Determine proper entity for the R3F
- Build a strong, resilient, and equitable recovery by making investments in priority areas that support long-term growth and opportunities.

**Guiding Questions:**

*How do we support organizations to be at the table in the future given time is valuable, without it being transactional?*

*What is the purpose of the Core group and how do we bring people to that space? Do they make decisions, reflect, and provide advice or implement programs?*

*What is the proper mix of programmatic initiatives, advocacy, and system engagement to shift the culture from unjust systems to resident led power?*

**Scope of Work & Deliverables**

The primary deliverable should be a clear, accessible, strategic plan that is a roadmap that includes a timeline, and implementation steps, and evaluation methodology. There will be benchmark deliverables throughout the project as outlined below.

We expect the proposal to include the following:

- Research and recommendation of governance structures for community-led grantmaking
- Design and execution of a strategic visioning and comprehensive planning process which is equity driven and captures the community's voice
- Development of an actionable three to five-year strategic plan, including program recommendations and projected budget for implementation
- Recommendations regarding the plan's implementation and support structure assessing the landscape, building partnerships, and engaging community and systems decision makers.

**Strategic Plan Phases****Phase 1: Governance Structure Design**

Innovation in Community stewardship

Put collective decision- making processes in hands of most impacted folks

**Phase 2: Strategic Planning**

Programs integrating Community Engagement

Program feasibility & impact study and Universal Basic Income (UBI) Proposal and other programs as aligned

**Phase 3: Sustainability**

Implementation Plan and Timeline, Tiered process and Fundraising

**Deliverables:**

- Engagement with Stakeholders

- Overall engagement plan for WCC Care Coalition, R3F, break out groups/ think tanks and facilitation of well-planned and strategic planning activities; facilitation in Spanish should be included in scope.
- Community Led Governance Recommendations
  - Summary of governance structure and/or bylaws and implementation
  - Plan for engaging stakeholders in governance design
- Program recommendations and implementation plan
  - Summary of priority area program goals
- Long term Sustainability Plan
  - Summary of overall outcomes with notes

Specific areas that the R3E desires to be included in the scope for the creation of a 3–5-year strategic plan:

R3F Core Members	WCC Care Coalition
Our governance structure, priority area activities within the socio-political-economic climate in Richmond, foundations, and collective impact work.	Our community and economic development strategies and opportunities for collective impact and systems transformation within the current socio-political-economic climate in the City of Richmond.
SWOT Analysis	SWOT Analysis
Alignment of key programming activities, including staffing and budgeting for those activities, with our mission and vision  What will we lead, follow and join to make deep collective impact to stabilize residents in the City of Richmond?	Alignment of key programming activities, including staffing and budgeting for those activities, with our mission and vision  What will we lead, follow and join to make deep collective impact to stabilize residents in the City of Richmond?
Collaborative capacity and development goals in the context of current collaborative lifecycle stage.	Organizational capacity and development goals in the context of current organizational lifecycle stage.
Fund Sustainability, Governance & Growth	Collaborative Sustainability, Impact and Activities
Mission or Vision	

### ***R3F Principles & Practices:***

Meeting the immediate needs and priorities of our community is paramount. Naming and transforming the systemic inequities that have created the conditions culminating in this pandemic are tantamount. Towards this, the R3F commits to the following principles and practices.

- We center relationships, healing, and justice.
- We center the priorities and lived expertise of residents and families most vulnerable to systems harm and dehumanization.
- We disrupt white supremacy and anti-Blackness in our systems, policies, practices, investments, and relationships.
- We disburse, coordinate, and advocate for resources through equitable, humanizing, and transparent processes.
- We cultivate power as we procure resources.
- We partner with other response efforts and funds to grow the ecosystem of community assets and power.
- We engage in healthy struggle so that we stay attuned, accountable, innovative, and creative.
- We give ourselves and each other grace and space. We learn and adapt through ongoing inquiry and reflection.
- We celebrate and appreciate.

Guided by our community, priorities, principles & practices, the R3F is moving towards a framework from crisis to recovery with the goal of community stabilization. The R3F seeks to inform and create transparent plan for which activities we may lead, join, or follow.

#### ***Key stakeholder (shortlist):***

The City of Richmond, Richmond Rapid Response Fund, and their partners The RYSE Center, West Contra Costa Public Education Fund (EdFund West), Richmond Promise, Building Blocks for Kids and the Richmond Rent Program and other partners are key stakeholders in the WCC Care Coalition.

The Consultant will work with:

1. R3F Core Partners and Staff
2. WCC Care Coalition
3. Community Members

#### **West Contra Costa Care Coalition:**

- Collaborative Lead (Kanwarpal Dhaliwal)
- Collaborative Key Funders (up to 6 funders)

**Richmond Rapid Response Fund:**

- R3F Staff (Executive Director & Program Officer)
- R3F Core Partners (5 - 9 people)
- Rent Relief Working Group
- Priority Area Partners
- Key Funders (top 5-6)
- Richmond residents

Additional scope/proposal considerations:

**Written Recommendations and Implementation Plan:**

- Program Feasibility & Impact Study
- Priority Area SWOT/Gap Analysis, Policy Recommendations
- Governance Recommendations
- Timeline for implementation

**Technical Assistance Resources**

- Governance Models:
  - a. Community Engagement and Leadership
  - b. Bylaws and Implementation
  - c. Virtual engagement protocols
  - d. Transparency and Equity Grantmaking Best Practices

**Eligibility:**

**WHO MAY RESPOND** - The City of Richmond and the West Contra Costa Public Education Fund require a consultant with demonstrated experience in developing successful consensus-based and community-driven strategic plans, strong facilitation skills, and extensive work with non-profit strategic planning. We seek an experienced strategic planning consultant to design and facilitate a participatory planning process that will create an equity-centered strategic plan and governance design for the R3F. We desire for community engagement to take place in person with residents and community groups.

***Consultant Qualifications:***

*The R3F is seeking Governance Advisor/Strategic Planning Facilitation Consultant who will help design the planning process and will then facilitate the planning process (June 1, 2022 - TBD). The R3F desires this portion of the work to be completed by end of 2022. The response for this RFP should identify the pros and cons of this. The consultant will be working with Core group, WCC Care Coalition, staff and key stakeholders who are deeply invested in manifesting the organization’s vision to coalesce diverse perspectives and input toward an aligned plan and direction.*

## **Consultant Qualifications Desired**

1. Demonstrated experience with facilitating a strategic planning process with collaboratives, collectives and/or coalitions, foundations, or endowments
2. Demonstrated and active analysis and application of racial justice praxes in areas of community engagement, systems change, and strategic planning.
3. Familiarity/ Expertise or experience working to support organizations be successful in transformative collaboration in the Priority Areas\*
4. Demonstrated experience in co-facilitating Strategic Planning processes
5. Demonstrated experience with community development and/or economic development issues and community stabilization or recovery efforts.
6. Able to utilize virtual technology and innovative engagement for group interviews, retreats, and breakout sessions
7. Effective communication and facilitation skills.
8. Shared values with Priority Areas and commitment to equity

Additional and important qualifications of a consultant would be a working analysis and application of racial equity, anti-racist, racial justice frameworks, systems change, community development, community fund governance and community-led grantmaking. As these are part of our commitments and growing aspirations as an organization, the R3F seeks a consultant who can assist on aligning our work with these values. The consultant must have a minimum of 5 years of experience or more organizing and leading strategic planning work in the nonprofit sector, experience with philanthropy preferred.

### ***Proposal Process and Timeline:***

#### ***Process***

#### **PRE-PROPOSAL MEETING**

To provide general information and guidance to all potential respondents, the R3F will hold a virtual Pre-Proposal Meeting. All potential respondents are strongly encouraged to attend the pre-proposal meeting. The meeting information and the video of the meeting will be provided to all prospective bidders via [BidsOnLine](#). **Pre-Proposal Meeting date will be Monday, March 21, 2022, at 1:00 p.m. – 2:00 p.m.**

#### **OPPORTUNITY TO SUBMIT QUESTIONS VIA BIDSONLINE**

Submission of questions regarding this RFP must be submitted via the electronic [BidsOnLine](#) system on the Q&A tab by **Friday, March 25, 2022 at 5:00 p.m.** If the City finds it necessary to issue an addendum, prospective bidders will receive e-mail notification of addendum. Otherwise, answers to questions received will be provided on the Q&A tab by **Thursday, March 31, 2022 by 5:00 pm.**



*Timeline:*

<b>Request for Proposals (RFP) Released</b>	<b>3/11/2022</b>
<b>Pre-Proposal Meeting Virtual/Video Conferencing</b>	<b>3/21/2022 1:00 pm - 2:00 pm</b>
<b>Questions Due by Q&amp;A Tab - <a href="#">BidsOnLine</a></b>	<b>3/25/2022 by 5:00 pm</b>
<b>Frequently Asked Questions Published - <a href="#">BidsOnLine</a></b>	<b>3/31/2022</b>
<b>Online Proposals Due</b>	<b>4/11/2022 by 3:00 pm to <a href="#">BidsOnline</a></b>  <b>An online receipt will be produced in the form of an email upon submission. Proposals submitted after the deadline will not be considered for review.</b>
<b>Interviews (if held)</b>	<b>4/29/2022 (1:00 pm – 4:00 pm)</b>
<b>City Council Contract Approval</b>	<b>5/2022</b>
<b>Projected Contract Period</b>	<b>June 1, 2022 - December 31, 2022</b>

**Proposal Contents and Selection Criteria**

Based upon the submitted written responses to this RFP, City’s selection team will review and rank the proposals according to the following criteria and minimum required materials:

Proposals shall include the following:

**1.) Firm/Team Introduction and Background (10 points)**

**2.) Demonstrated Expertise (30 points)**

- A. Credentials and qualifications of consultant, including three professional references.
- B. Selection of one or more subject area(s) for which you are qualified:
  - a. Community-Led Governance Structure Implementation//Design
  - b. Collective Impact Strategic Planning
  - c. Results-Based Accountability
  - d. Community-Based Planning and Evaluation
  - e. Supporting successful multi-sector partnerships
  - f. Poverty Reduction, Community Development, Economic Recovery/Stabilization
- C. A summary of prior engagements that include multiple audiences and co-facilitators, if any.

D. Resumes of key Consultant staff to work on project

**3.) Proposal Narrative & Scope (40 points)**

- A. A description of the applicant’s general approach to strategic planning process, including general methodology, perspective, and/or guiding philosophy.
- B. A list of project deliverables, including estimated timelines for each deliverable and overall project completion including the following:
  - a. Strategic Planning Dates/Activities
  - b. Strategic Planning Summary & Recommendations Due

**4.) Project Budget (20 points)**

A detailed project budget that includes the cost of the consultant’s time and any other expected expenses to bring the project to successful completion. We anticipate an overall budget not to exceed \$100,000 including all indirect costs. If tasks requested cannot be completed within the overall budget, respondents shall provide a list of optional tasks with associated costs.

A maximum of four (4) Consultants will be interviewed. Staff anticipates interviews will be held via Zoom on **April 29, 2022 beginning at 1:00 p.m. The City reserves the right to not hold interviews.**

**Final proposals must be submitted by 3:00 pm on April 11, 2022.**

Proposal submission process is entirely online and must be completed and submitted through BidsOnLine to be considered.

**CITY OF RICHMOND GENERAL GUIDELINES**

1. **City Disclaimer:** The City reserves the right to reject any or all the Proposals, to waive any informality in any Proposal, and to select the Proposals that best meet the City needs. The City also reserves the right to reduce or revise elements of the scope of services, or to amend or modify the contractual requirements, or to negotiate with any qualified consultant.

No representation is made that any contract will be awarded pursuant to this RFP. In no way shall a contract be viewed as exclusive. The City reserves the right to retain additional consultants as necessary. All costs incurred in the preparation of the qualification, in the submissions of additional information and/or in any other aspect of qualification prior to the award of a written contract will be borne by the proposed firm. All qualifications submitted to the City in response to this RFP will become the property of the City of Richmond and will not be returned. The “technical” portion of the Proposal will be considered public information.

2. **Comments/Questions on the City Standard Service Provider Agreement:** The City’s standard service provider agreement, which the Consultant Team will be required to sign, is attached for your consideration (see **Exhibit A**).

The proposer shall state whether it takes exception(s) to this RFP, including but not limited to the City of Richmond's Standard Services Agreement (Exhibit A). If the proposer does take exception(s) to any portion of the RFP or contract, the specific portion to which exception(s) is taken must be identified by section number and explained. Requests for changes, additions or requesting deletion of specific words and/or by providing new requested contract language shall be provided. Requests for complete replacement of the City of Richmond's Standard Services Agreement for another contract will not be considered. Failure to make exceptions to the RFP or Standard Services Agreement within the proposal will be deemed a waiver of any objection. Exceptions will be considered during the proposal evaluation process and are not guaranteed to be approved.

**3. Insurance Requirements:** The City requires consultants doing business with it to obtain insurance, as shown in RFP (see **Exhibit B**). The required insurance certificates must comply with all requirements of the standards as shown and must be provided within fifteen (15) days of issuance of the Notice of Intent to Award and prior to the commencement of any work on the project.

**4. Business Licenses:** The successful Contractor and all subcontractors used in the work will be required to hold or obtain a City of Richmond business license for which the fee will not be waived.

**5. Sanctuary City Contracting Ordinance (SCCO):** The Richmond Sanctuary City Contracting Ordinance No. 12-18 N.S. (**Exhibit C**) prohibits the City from granting and or retaining contracts with any person or entity that provides Data Broker or Extreme Vetting services to the U.S. Immigration and Customs Enforcement Division of the United States Department of Homeland Security ("ICE"). Bidders/Proposers must submit the attached Sanctuary City Compliance Statement with their Bid or Proposal/Qualifications (**Exhibit D**).

**6. Limited Liability Companies Disclosure Statement (LLCS):** Resolution No. 86-21, approved by City Council on July 6, 2021, requires disclosure of the identities of beneficial & responsible owners of Limited Liability Corporations (LLC) (**Exhibit E**). Bidders/Proposers must submit the attached Disclosure Statement of Limited Liability Companies Form with their Bid or Proposal (**Exhibit F**).

### **Exhibits**

Exhibit A: City's Standard Service Provider Agreement

Exhibit B: Insurance Requirements

Exhibit C: Richmond Sanctuary City Contracting Ordinance No. 12-18 N.S.

Exhibit D: Sanctuary City Compliance Statement

Exhibit E: Limited Liability Corporations (LLC), Resolution No. 86-21

Exhibit F: Disclosure Statement of Limited Liability Companies Form