



Human Solutions

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Portland, OR 97236
503.548.0240
www.humansolutions.org

Strategic Planning

Request for Proposals

Application Deadline:
October 21, 2016
5:00 p.m. (pst)

PLEASE SEND YOUR PROPOSAL TO:

HUMAN SOLUTIONS
By email:
tlux@humansolutions.org

Questions?

Tanja Lux
Chief Financial Officer
503.548.0206
tlux@humansolutions.org

Human Solutions helps low-income and homeless families and individuals overcome the effects of poverty and homelessness.

Strategic and Equity Planning **Request for Proposals**

Human Solutions, Inc. (HSI), a non-profit corporation providing affordable housing, anti-poverty services and employment assistance in East Multnomah County, Oregon is seeking an experienced organizational consultant to work with the Board of Directors, senior agency leadership, staff and selected stakeholders to develop a Strategic and Equity Plan that will guide the direction, priorities and key business decision-making for the agency over the next three-five years.

The successful proposer will use a variety of techniques to work with Human Solutions over a period of four to six months to answer key questions, set the agency's direction and to develop a plan to achieve identified objectives and to operationalize the agency's values with respect to diversity, equity and inclusion.

The organizational consultant should have relevant experience in working with nonprofit organizations to develop strategic plans that respond effectively to internal, environmental, political, and fiscal realities. The consultant or consultant team should also have a successful track record of working with agencies to develop and operationalize an equity lens or statement and to meaningfully advance diversity, equity and inclusivity in agency operations. Experience working with agencies that deliver community impact in the areas of Affordable Housing, Homeless and Anti-Poverty Services, and/or Employment/Economic Opportunity is preferred, but not required.

Organizational Overview

Human Solutions is part of a network of organizations in the Portland metro area that serve low-income communities, families and residents experiencing homelessness and poverty. HSI was formed in 1988 to provide anti-poverty services in East Multnomah County and purchased its first affordable housing property three years later. With a current staff of approximately 130 and an annual budget of approximately \$13 million, HSI provides a range of human services and develops, owns and operates affordable housing toward the fulfillment of our mission to help low-income families in East Multnomah County build pathways out of poverty and homelessness. Our current programs and services include: utility and rental assistance, eviction prevention, housing assistance and family support, and employment assistance. HSI currently manages two 24/7 homeless shelters and provides asset management and resident services at 720 units of affordable housing owned by HSI or a subsidiary corporate entity.

Additional information about our range of programs, services and affordable housing may be found on our website at:

<http://www.humansolutions.org/about-us/>

Strategic and Equity Plan

Human Solutions currently operates pursuant to a strategic plan adopted by the Board in August 2015. The plan was developed and adopted just as a change in leadership of the agency was taking place - with the retirement of Jean DeMaster – the agency’s longstanding Director - in September, 2015 and the onboarding of the agency’s current Director. The current strategic plan was developed largely by the agency’s leadership and Board with the assumption that the organization would undertake a more comprehensive planning effort involving a broader set of staff and stakeholder input in the fall of 2016 – after new leadership had an opportunity to come on board and fully scan the opportunities and challenges.

Human Solutions holds community equity as one of the agency’s highest values and adopted an equity statement in 2013. The equity statement can be found in full on the agency’s web page at: <http://humansolutions.org/about-us/equity-statement/>

The agency has active initiatives and plans with respect to diversity, equity and inclusivity, and a standing staff committee that provides advice and oversight with respect to DEI work and training.

HSI now desires to undertake planning work to develop an updated strategic and equity plan that will inform the agency's budget, fund development, program and housing work over the next three to five years. The plan will answer several key questions facing the agency, including the following:

Mission and Vision

- What is the optimal role and mission of Human Solutions with respect to serving the diverse low-income communities of East Multnomah County?
- As an agency with a deep history of providing services that respond to homelessness and as a developer of affordable rental housing, how do we respond most effectively to the housing crisis impacting our community?
- While our mission has historically focused on East County, what consideration should we give to providing services or developing affordable housing outside of our core, historic service area?

Equity

- How do we operationalize our Equity Statement and ensure that our agency advances our values with respect to diversity, equity and inclusivity in our work and workplace? How will we measure our progress toward our equity goals and vision over time?

Program Impact

- How do we best evaluate the impact of our programs, services, housing and shelter assets? Where and how should we expand our highest-impact programs and initiatives? What new initiatives will most advance our mission and create the greatest community impact?

Governance and Culture

- How can the Board of Directors best fulfill its role to oversee the agency and support its mission? How do we foster engagement and support and grow the Board's capacity?
- What organizational structure and capacity will be needed to ensure that we achieve our goals?

- How can we best ensure a positive work culture that retains and attracts a talented, diverse workforce, supports professional development, a high level of morale, and that reflects our core values?

Financial Capacity

- What resources and infrastructure will we need to develop to achieve our goals? How will we marshal needed resources?
- What is our plan for long-term financial stability of the agency and its assets?

Accountability and Adaptability

- What mechanism(s) will we use to remain accountable to our goals and manage needed course corrections along the way?

Our goal is to complete this process with a focused, concise statement of our strategic direction and plan and equity lens implementation over the next three to five years. We expect this document to describe our mission, goals and core strategies for our board, staff, funders, clients and stakeholders and to include an accountability framework to keep us on track to meet our stated goals.

Strategic Planning Timeframe

HSI has begun internal work to prepare for this Strategic and Equity Planning process. We are planning a Board retreat for late fall, 2016 to launch the planning process. We expect to have the plan completed by the end of April, 2017 in order to prepare our budget appropriately for the fiscal year that begins July 1, 2017.

RFP Submissions

Human Solutions requests proposal of no more than five pages in length that identify the team that will be working with Human Solutions (including the proposed role of each team member), detail the team's experience providing strategic and equity planning services for similar clients, and provide a proposed process, methodology, approach and timeline for providing these services for Human Solutions. Resumes and other attachments may be included, but will count toward the five page proposal length limit.

In addition to the proposal narrative, proposals should provide a budget that includes the following:

- ❖ Number of estimated hours for each activity (these may later be scalable – based on the quantity of services identified in contract negotiations. For example, if a proposal suggests “focus groups” as a component of the process, it would help to have a basic rate and description for one focus group and a suggested number proposed. We may scale the proposed quantity up or down in the development of the contract for services.
- ❖ Billing rate(s) for each team member and estimated number of hours
- ❖ Estimated out-of-pocket costs

On a separate sheet, please provide the names and contact information for up to four references for whom you have recently provided similar services.

Note: The budget and reference pages do not count against the five page proposal limit.

RFP Requirements

Completed Proposals must be submitted electronically in MS Word or PDF Format to:

Tanja Lux, Chief Financial Officer
Human Solutions, Inc.
tlux@humansolutions.org

Please reference: “Strategic Planning” in the subject line

Proposals must be **RECEIVED** by Human Solutions no later than 5:00 p.m. on Friday, October 21st. Proposals received after this time will not be considered.

All costs in preparation and submittal of the proposal are to be borne by the proposer. Human Solutions will not reimburse any costs associated with the preparation or submittal of this proposal.

Evaluation Criteria

Proposals will be evaluated by a selection committee that includes members of Human Solutions staff, board and leadership. The committee will use the following criteria to select the team with whom Human Solutions will contract for these services:

- Demonstrated experience creating successful, collaborative processes that develop impactful, accountable strategic plans or similar products;
- Knowledge of the principles and values of diversity, equity and inclusivity and demonstrated successful experience working with agencies like Human Solutions to place these core values into operation and action;
- Familiarity with some or all of the elements that make up the current working environment of Human Solutions, including but not limited to: The communities, demographics and politics of East Multnomah County, local affordable housing, homeless services and workforce development delivery systems and funding streams, and the approaches of trauma informed care and assertive engagement; nonprofit culture, governance and operations;
- Overall process design and efficiency of proposed cost structure;