



REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING

The Urban League of Rochester, NY, Inc. (ULR) invites qualified and experienced applicants to participate in a Request for Proposals (RFP) process aimed at guiding and executing a comprehensive strategic planning process for the development of a three-year plan (2025-2028). As the League undertakes this crucial endeavor, it seeks applicants who can seamlessly integrate a Diversity, Equity, and Inclusion (DEI) and Anti-racist lens to inform and shape the upcoming strategic plan.

The successful applicant will work closely with the President & CEO, leadership team, and several board members to develop the specific details and logistics of the planning process.

All proposals are due by **February 23, 2024 at 5:00 pm**. All complete proposals received by this date will receive full consideration.

Submission Method: Electronic submissions to Dr. Seanelle Hawkins, President and CEO, Urban League of Rochester, at ebenedick@ulr.org

WHO IS ELIGIBLE TO RESPOND?

The Urban League of Rochester is looking for applicants with a robust understanding of its structure and mission. The preferred candidates will demonstrate strong facilitation skills, proven experience in nonprofit strategic planning, and expertise in Diversity, Equity, and Inclusion (DEI) and Anti-racist Initiatives. MWBE certified, Minority-owned businesses, woman-owned businesses, veteran-owned, and emerging small businesses are highly preferred.

The proposal must be received electronically by the Urban League of Rochester by 5:00pm on Friday, February 23, 2024. Electronic proposals are required. Proposals must be clear, succinct, and not exceed fifteen (15) pages. Title page, table of contents, and cover letter do not count in the overall page count of the proposal. Applicants who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

ABOUT THE URBAN LEAGUE OF ROCHESTER

To learn more about the Urban League visit www.urbanleagueroc.org.

The Urban League of Rochester was founded in 1965 in the wake of racial unrest and riots that crippled the Rochester community. The Urban League of Rochester will celebrate 60 years of serving the Greater Rochester community in 2025. ULR's mission is to enable African Americans, Latinos, the poor and other disadvantaged to secure economic self-reliance, parity



and power, and civil rights. It is an affiliate of the National Urban League, a leading civil rights organization. The agency is a community-based, nonprofit, providing advocacy and direct services to low-income and minority individuals within the Rochester metropolitan area with an emphasis on serving the most economically disadvantaged areas of Rochester.

Today ULR directly serves over 4,500 individuals per year, reaches approximately 30,000 through outreach services, and operates over 25 programs in the areas of Equity and Advocacy, Youth Education and Development, Workforce Development, Family and Children Services, Entrepreneurship focusing on minority and women-owned businesses, Services for Individuals with Developmental Disabilities, and Economic Development. Throughout its 59-year history, ULR has focused on working with the hardest-to-reach lower income individuals and collaborating with the public, nonprofit, and private sectors to provide innovative culturally enriched and equity-based programs. At its core, the Urban League of Rochester's driving mission and vision centers around greater equity. We accomplish our mission through our people. Our people, our most valued resource, lead programs, services, and initiatives that prioritize women and people of color. The Urban League of Rochester offers extensive wraparound services; our relationships with governing entities, community leaders, and other organizations; and our advocacy work prioritize equity, access, and racial justice. Our vision for the future of the Urban League and for Rochester is encapsulated in our Equity and Advocacy initiatives which aim to uphold our civil rights origin, mobilize community, and dismantle systems of inequity and structural racism. Our goal is to develop a multipronged strategy to work towards a more equitable and inclusive community.

The Urban League of Rochester (ULR) is dedicated to making a positive impact across seven key areas: housing, youth education, workforce development, entrepreneurship, intellectual disabilities, family and children's services, and equity and advocacy. Notably, ULR takes pride in placing equity and advocacy at the forefront of its focus areas.

Within the Equity and Advocacy department, the League is committed to addressing public health challenges, particularly acknowledging racism as a critical public health crisis. ULR actively engages in the battle against health inequities and collaborates with organizations to dismantle internal systems that perpetuate racism.

Through this dedicated department, ULR ensures that equity is not just a standalone initiative but is seamlessly integrated into every facet of its work. The Urban League of Rochester firmly believes that true progress and positive change can only be achieved when equity becomes a foundational principle guiding all its endeavors.

As part of its strategic plan, the Urban League of Rochester (ULR) seeks to:

- Re-evaluate its execution of our mission and strategic vision to ensure it reflects ULR today and clearly articulates its goals for the future.
- Engage stakeholders including, but not limited to, staff, community members, program participants, key partner organizations, policymakers, current ULR members and philanthropy partners.
- Partner with a qualified strategic planning expert to guide and execute a process to inform a three-year strategic plan.



The project will include a virtual launch meeting with ULR board members to clarify expectations and desired outcomes and ensure alignment of the applicant's work with desired goals. After the launch meeting, the applicant should develop a plan for designing and facilitating both online and in-person meetings with ULR stakeholders. The applicant will be expected to facilitate these meetings to identify strategic priorities and solicit ideas for integrating a plan to prioritize diversity, equity, inclusion, and anti-racist initiatives within ULR's work moving forward. The applicant will also provide questions that can be posed in a written call for feedback to members for inputs regarding the strategic plan. This will allow space for engagement from those who cannot attend virtual meetings.

PROPOSAL FORMAT

Expected services to be provided and deliverables for this consultancy include:

- A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project
- Qualifications of applicant and consulting staff who will be assisting with the projectsuch as; education, position, strategic leadership expertise, DEIJ experience
- Work plan for the consultancy to include timelines and desired outcomes
- Time and cost projections
- Three client references
 - Information regarding each reference should include the individual's name, business name, address, phone number and email address.

Please include the following information in your proposal:

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones & deliverables tied to the activities
- Proposed payment schedule tied to project milestones & deliverables
- Applicant's approach to strategic planning
- A summary of strategic planning experience
- Identify specific nonprofit sectors in which you have conducted strategic planning
- Previous Work Product: The proposal should include at least one sample of a previously completed strategic plan and include a statement regarding if the organization successfully completed the planning process:
 - Were there any failures? If so, what were the root causes? How were they addressed?
 - Which components were executed particularly successfully?

Portions may be redacted to protect private information as needed.



PROJECT APPROACH

The approach will include the applicant's statement of understanding of the project intent and requirements and should describe the proposer's approach to accomplishing the goals and deliverables of the project.

STATEMENT OF WORK

A clear written statement of the services to be performed, delivery, final products and deliverable. A concise outline delineating the specific tasks to be performed, indicating what will be done, in what sequence and timeline.

SCOPE OF WORK & DELIVERABLES

ULR expects the project applicant to work closely with the CEO, leadership team, and board leadership to develop specific details of the planning process, including the timeline, logistics, and deliverables. Collaborative conversations should include the opportunity to provide suggestions and feedback with respect to the content and structure of both stakeholder engagement and board planning sessions.

Stakeholder Engagement: Engage a diverse group of stakeholders including board members, volunteer leaders, members, donors, community partners, funders, program participants, community members and community leaders in and around the field to inform the strategic planning process. Stakeholder engagement may consist of focus groups, community listening sessions, surveys, or interviews. This process should be held virtually, if in-person meetings are scheduled all CDC COVID-19 guidelines must be adhered to.

Overall strategic planning results should include affirmation, revision of vision and value statements as well as strategic goals, strategies/action steps, and key performance indicators

WORK PLAN

The work plan should include the following:

1. Project Management and Facilitation
2. Design & execution of a strategic planning process that meets the criteria outlined in this RFP
3. Development of a three-year strategic plan (2025-2028) that includes a budget for implementation



4. Development and execution of a support structure for plan implementation. If necessary, costs for any new infrastructures and required resources.

The proposal should include:

- A. A project work plan that demonstrates a clear understanding of the deliverables, estimated hours, and other information relevant to the project
- B. Project approach
- C. Individual capabilities and experience of all consulting staff who will be assisting with the project such as; education, position within consulting firm, years & type of experience.
- D. Evidence commitment to Diversity, Equity, Inclusion, and Justice
- E. Time and Cost projections

RACIAL EQUITY AND DIVERSITY

Explain how the proposal will advance racial equity, inclusion, diversity, and justice. Identify if the applicant or firm is a certified MWBE. Minority-owned businesses, woman-owned businesses, veteran owned, and emerging small businesses are preferred.

QUALIFICATIONS AND EXPERIENCE

Include applicant (s) information and resumes on each key person involved in the project.

The proposal must describe the applicant's qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar nonprofit work.

Some key qualifications that will be considered:

- Education (degree(s) and/or certificate(s))
- Experience in successfully developing strategic plans
- Knowledge of collective impact or collaborative strategic initiatives
- Knowledge and experience interweaving DEIJ in strategic initiatives
- Strong facilitation skills
- Experience in creating a neutral environment for obtaining input
- Experience in gathering and utilizing data to drive the strategic process
- Ability to constructively challenge key stakeholders
- Experience in inspiring others to thinking innovatively
- Project management experience
- Knowledge of Person-Centered Practices



COST PROPOSAL

The proposal must provide quoted cost, in addition to a rate schedule to be provided in case of unanticipated change orders. The proposal should be clear in the specific tasks, hours, costs, schedule, and responsibilities.

OWNERSHIP AND CONFIDENTIALITY

All intellectual property will become the property of the Urban League of Rochester. All data remains the sole property of ULR. The applicant shall agree to keep information related to this process in strict confidence, including, but not limited to, the terms of the contract and any confidential business information or proprietary information that has been gathered on this project.

EVALUATION

The applicant's proposal and capabilities will be judged according to the following criteria:

1. **Understanding the problem/plan** (15pts)

The proposal will be evaluated based on the applicant's understanding of the nature of the project, issues, types of services necessary to accomplish the work, coordination issues and delivery of stated needs.

2. **Project approach and Statement of Work** (25 pts)

The applicant's proposal will be evaluated on its stated approach to accomplish the work and its ability to achieve the objectives set forth in the statement of work. This statement of approach must clearly outline how the work will be completed. The project approach should emphasize the use of technology and any tools that utilized throughout the process.



3. Individual capabilities and experience with similar projects (25 pts)

The project will be evaluated based on the experience and skills of the applicant and/or consultants as they relate to this project, capacity to perform required tasks and knowledge and experience with DEI Strategic Plans.

4. Racial Equity and Diversity (25 pts)

The proposal will be evaluated based on the extent to which racial equity and diversity have been incorporated into the applicant team and work plan,

5. Project Timeline and Cost proposal (10 pts)

The proposal will be evaluated based upon the proposed project timeline/schedule and the specific tasks, hours, costs. Proposed payment schedules should be tied to project milestones & deliverables.

CLOSING SUBMISSION DATE

Proposals are due by 5:00pm on Friday, February 23, 2024.

INQUIRIES

Inquiries concerning this RFP should be directed to Eliza Benedick – Assistant to the President 585 325-6530, ext. 3003, or ebenedick@ulr.org

RESERVATION OF RIGHTS

ULR reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. ULR may, at its sole and absolute discretion, elect not to select any applicant for these services if, in its determination, that no applicant is sufficiently responsive to the need. ULR reserves the right to withdraw this Request for Proposal (RFP) and/or any item within the RFP at any time without notice. ULR reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of ULR. It does not commit ULR to award any contract for service.



CONFIDENTIALITY

If the applicant deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

INELIGIBILITY

Under the following conditions, an individual or entity is ineligible if they are listed on OIGLEIE, GSA SAM, and/or state vendor exclusions lists.

NOTIFICATION OF SELECTION

An email acknowledgement of each submission received will be sent to the applicant. All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.

After preliminary rating and ranking of proposals, interviews may be scheduled with finalists, particularly if two or more proposals are closely rated and/or more information is needed.

References will be contacted for all finalists. All applicants will receive written notification of ULR's decision regarding their proposal, and an announcement of the applicant awarded the project will be posted on ULR's web site, www.urbanleagueroc.org.

TIMELINE:

January 16, 2024	RFP Release Date
February 23, 24 at 5pm	Deadline for receipt of proposals
February 26– March 12	Evaluation of proposals
March 18-March 22, 2024	Interviews with top two applicants
March 25, 2024	Notice of selection e-mailed to applicants
March 28, 2024	Notification of project award posted on ULR web site
March 29, 2024	Begin engagement/contract executed