



REQUEST FOR PROPOSALS STRATEGIC AND FINANCIAL PLAN DEVELOPMENT MARCH 2016

RFP NUMBER: MALB#01-2016
DATE ISSUED: March 16, 2016
DATE DUE: April 8, 2016, at 3:00 PM (LOCAL TIME)
Proposals will be opened publicly at this time in the Calhoun County Land Bank Office at 315 W. Green Street, Marshall, MI

The Michigan Association of Land Banks (MALB) is soliciting proposals from qualified firms to prepare a three-year strategic plan and a three-year financial plan for the organization.

Please submit questions via email to: Christine Schauer
MALB Vice President
cschauer@calhouncountymi.gov
Include Subject Line: MALB#01-2016 Question

To be considered, hard copies of the proposals must be received by 3:00 pm on **Friday, April 8, 2016**.

Background

Recognizing the on-going need for a support system to cultivate strong land banks in the state, the Michigan Association of Land Banks (MALB) formed as the only statewide network of land bank leaders. MALB executes programs and policy work to ensure that land banks have the policies, support, and capacity to effectively operate local land bank programs. Center for Community Progress, a national nonprofit organization committed to helping communities looking to transform vacant and abandoned spaces into vibrant places, has served as a strong partner to MALB since its inception and, most recently, has provided core staffing support to greatly expand the membership and services of MALB.

The continued education, technical assistance, and network building work conducted by MALB is crucial to ensure land banks in Michigan are able to build, manage, and sustain effective land bank programs. To date, the work under MALB has been conducted by the Center for Community Progress staff, largely on an in-kind basis. In order to sustain itself, MALB needs to create a clear strategic plan for the next several years and develop a future fundraising strategy to lay the ground work for successful membership and non-membership fund development.



Scope of Work

In order to provide MALB with a strong foundation and comprehensive framework for decision making, the selected vendor will develop (1) a three-year strategic plan and (2) a three-year financial plan.

For the three-year strategic plan, the selected vendor will provide the following services:

- Work with the MALB Executive Committee to determine areas of focus for the strategic planning process, which could include a focus on MALB programs/activities, organizational development, and/or board development.
- Review MALB's current governing documents, including but not limited to MALB's bylaws, meeting minutes, and annual goals; MALB's current program documents, including materials for upcoming and past Land Bank Leadership Summits and Land Bank Learning Exchanges; and MALB's current website, brochures, and other materials.
- Conduct and facilitate one (1) or two (2) meetings for a total of eight (8) hours with the MALB Executive Committee, MALB members, and/or internal stakeholders to brainstorm goals, objectives, and outcomes under each of the identified areas of focus. These goals, objectives, and outcomes can then be used to create work plans for the MALB Executive Committee and individual members. As part of the meetings, the selected vendor will also meet with external stakeholders, including Center for Community Progress staff, to identify any additional needs that could be supported by MALB's goals.
- Use information garnered during the meetings to draft a three-year strategic plan within 30 days of the completed meetings. The strategic plan will include a short-term action plan that can be implemented immediately, as well as a broader strategic vision that can provide on-going guidance to MALB members and the MALB Executive Committee.

For the three-year financial plan, the selected vendor will provide the following services:

- Work with the MALB Executive Committee to determine areas of focus for financial sustainability.
- Examine the current dues structure and make recommendations for how it could be adjusted to help MALB reach its financial goals, including being financially independent and sustainable.
- Conduct and facilitate one (1) or two (2) meetings for a total of eight (8) hours with the MALB Executive Committee, MALB members, and/or internal stakeholders to brainstorm goals, objectives, and outcomes under each of the identified areas of focus. These goals, objectives, and outcomes can then be used to create work plans and budgets for MALB. As part of the meetings, the selected vendor will also meet with external stakeholders, including Center for Community Progress staff, to identify any additional needs that could be supported by MALB's goals.
- Use information garnered during the meetings to draft a three-year financial plan within 30 days of the completed meetings. The financial plan will include short- and long-term fundraising and budgeting goals as well as identifiable metrics to ensure MALB is able to sustain itself financially over the short- and long-term.



Deliverables & Timeline

The strategic planning process should be developed and take place over the course of 3 months.

The selected vendor will deliver final versions of the following to MALB no later than **July 22, 2016**:

- (1) A three-year strategic plan, and
- (2) A three-year financial plan.

Firm Qualifications

Respondent(s)* must demonstrate the following qualifications:

- Specific knowledge of the operations of land banks, governmental organizations or associations, and/or non-profit organizations.
- Specific knowledge and experience developing and preparing strategic plans and financial plans for land banks, governmental organizations or associations, and/or non-profit organizations.
- Exceptional ability to facilitate a process working with governmental and quasi-governmental agencies.
- Experience in working with focus groups and the best evaluation strategies to ensure the strategic planning process will be inclusive, relevant, and able to capitalize on the institutional knowledge and expertise of all stakeholders.

*Respondents may be a single firm or a team of two or more firms.

Proposal Requirements

Proposals should include the following information:

- Letter of interest describing the experience of the firm(s) in preparing strategic and financial plans for land banks, governmental organizations or associations, or non-profit organizations.
- Overview of the firm(s), including staff size and structure, number of years in business, and national and/or local affiliations.
- Name(s), qualifications, and experience of the individuals who would perform the work.
- A work plan that includes the approach to accomplish this work as well as a proposed schedule.
- Fee for preparing a three-year strategic plan and a three-year financial plan (see Appendix A).
- Estimate of any other costs associated with performing the Scope of Work described above (see Appendix A).
- Three references for similar projects and a description of the projects (see Appendix B).



Evaluation Method

Factors used to evaluate the proposals will include the following (see Appendix C):

- Extent of experience in preparing financial and strategic plans for land banks, governmental organizations or associations, and/or non-profit organizations.
- The number of partners and associates with experience in financial and strategic planning.
- Collective experience of financial- and strategic-planning team as well as the quality of the submitted work plan.
- Client references.
- Compliance with all specifications noted in this RFP.
- Cost and value of respondent(s) proposal.
- If applicable, results of oral interviews with proposing firms.

Question & Answers

Written questions must be submitted via email to cschauer@calhouncountymi.gov by **5:00pm Tuesday, March 29, 2016**. Written answers will be provided to all potential applicants via a post on the MALB website (<http://milandbank.org/>) by **5:00pm Thursday, March 31, 2016**.

Timeline for Proposal and Scope of Work

Please submit your proposal by 3:00 pm (local time) on **Friday, April 8, 2016**. The prevailing clock shall be www.time.gov.

Each applicant must submit three unbound copies of the proposal as well as one electronic copy on a memory stick; electronic submissions via email will not be accepted. Each respondent is responsible for labeling the exterior of the sealed envelope containing the proposal response with the proposal number, proposal name and proposal due date and time, and your firm's name. All proposals must be submitted to the following address:

MALB#01-2016
Christine Schauer, MALB Vice President
Office of the Calhoun County Land Bank
315 W Green Street, Garden Level
Marshall, MI 49068

The MALB Executive Committee is expected to make a selection of a firm or team of firms by **Friday, April 22, 2016**. All firms submitting proposals will be notified of the MALB Executive Committee's final selection.

Final deliverables will be completed by **Friday, July 22, 2016**.



RFP Submittal Requirements Checklist

- Letter of Interest
- Description of Firm's Experience with Similar Projects
- Overview of Firm's History and Personnel as well as the same information for any subcontractors
- Work Plan
- Pricing Proposal (See Appendix A)
- Three References and Accompanying Project Information (See Appendix B)

Rights Reserved

The Michigan Association of Land Banks (MALB) reserves the right to reject any and all responses, or waive any irregularities therein, or to award its final selection to a firm or team of firms other than the lowest bidder, if in the best interest of MALB. Decision to reject any and all responses shall not be a basis for any right, claim, or cause of action by respondents against the Michigan Association of Land Banks or any of its agents or employees.

Non-Discrimination Policy

The Michigan Association of Land Banks (MALB) does not discriminate against any person on the grounds of race, color, creed, religion, height, weight, sex, age, national origin, handicap, or marital or familial status except as provided by law. MALB complies with all requirements imposed by Title VIII of the Civil Rights Act of 1968 (as amended by the Fair Housing Amendments Act of 1988), the American with Disabilities Act, the Elliott-Larsen Civil Rights Act, and the Michigan Persons with Disabilities Civil Rights Act.



Appendix A

Please complete the following pricing information as listed below. Please note that additional fees outside of the cost of the plan and the work associated therewith must be noted as part of the response to be considered.

Cost Details for Services Required	
Preparation of three-year strategic plan:	\$
Preparation of three-year financial plan:	\$
Other Cost #1:	\$
Other Cost#2:	\$
Overall Project Cost	\$



Appendix B

List of Three (3) References and Description of Services Provided

Reference 1

Company/Municipality: _____
Contact Person: _____ Title: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Email: _____
Type of Project(s): _____

Reference 2

Company/Municipality: _____
Contact Person: _____ Title: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Email: _____
Type of Project(s): _____

Reference 3

Company/Municipality: _____
Contact Person: _____ Title: _____
Address: _____
City: _____ State: _____ Zip: _____
Telephone: _____ Email: _____
Type of Project(s): _____



Appendix C

In evaluating responses to this Request for Proposal, Michigan Association of Land Banks will take into consideration the experience, capacity, and costs that are being proposed by the Respondent(s); however, it will also take into consideration the quality of the work plan, overall proposal, and time project frame; when applicable, the performance of respondents in oral interviews will also be considered.

The following Evaluation Criteria point system will be used as a tool to help review submittals:

Experience in providing Strategic and Financial Plan Development. Maximum points 20.

Three (3) to ten (10) years of experience providing strategic and financial plan development services	15 Points
Greater than ten (10) years of experience providing strategic and financial plan development services	20 Points

Compensation Bid. Maximum points 50.

Lowest bid amount	50 Points
Next lowest bid amount (5 points reduced for next lowest bid)	45 Points

Other. Maximum points 30.

Three positive references	10 Points
Michigan based company	10 Points
Experience providing services to land banks	10 Points

Total Score: _____