



Request for Proposals

FOR STRATEGIC PLANNING SERVICES

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Overview

The Atlanta Land Trust (“ALT”) is seeking proposals (“Proposals”) from firms (“Firm” or “Firms”) capable of facilitating the development of and delivering a strategic plan that will clarify the organization’s goals and identify priorities to position the organization for future growth. This strategic plan, grounded in research and analysis, will serve as an institutional roadmap to guide ALT and advance the organization’s mission over the next three to five years.

Background on the Community Land Trust Model

Under the leadership of The Atlanta BeltLine Partnership, the Atlanta Housing Association of Neighborhood-based Developers and the Annie E. Casey Foundation, a group of more than 30 public, private, nonprofit and community organizations created ALT in 2009 to maintain affordability in neighborhoods at risk of gentrification and displacement in portions of the city of Atlanta directly impacted by the Atlanta BeltLine.

ALT’s mission is to deliver and steward permanently affordable housing solutions to support inclusive, equitable communities near the Atlanta BeltLine and other targeted areas in Atlanta. ALT primarily serves Atlantans where traditional homeownership has been out of reach—generally those at or below 80% of the area median income. ALT operates as a community land trust (“CLT”), a model born out of the Civil Rights movement in Albany, Georgia, and originally designed to establish a new form of land tenure for Black farmers and their families seeking community empowerment and economic solidarity. As one of more than 300 CLT programs in the United States, ALT offers permanently affordable housing opportunities, allowing families to realize a portion of the equity built through homeownership while preserving the affordability of homes for future generations.

CLTs remove land from the speculative real estate market and put it into community control for community benefit. In order to create affordable homeownership opportunities, ALT sells homes at affordable prices while retaining ownership of the underlying land. In this model, the homebuyer purchases—and owns—the home, but with conditions in place to ensure that the home remains affordable in perpetuity should the buyer choose to sell in the future. Upon sale, the homeowner shares in any appreciation in value that has occurred, but ownership of the land by ALT preserves affordability for future buyers.

CLTs have demonstrated success in creating pathways to traditional homeownership for low-income families—approximately 63% of CLT homeowners proceed to purchase homes at market rate. ALT provides a pathway to homeownership for Atlantans for whom it remains out of reach. ALT’s work presents an urgent opportunity to mitigate gentrification resulting from public investments with a comprehensive, equity-driven approach that connects people, place, and quality of life. By keeping housing permanently affordable, ALT helps reduce the displacement that can accompany gentrification and provides a community framework that supports residents.

Context for Strategic Plan

ALT is currently operating under a strategic plan that was created in 2020. This plan established an overarching goal to collaborate with communities to develop 300 permanently affordable, energy-efficient homes by 2025. Presently, ALT has over 80 homes in trust occupied by qualified families, 110 units in development and 170 units identified as future development opportunities, bringing us within reach of this ambitious goal. ALT is now seeking to build upon these accomplishments and set the direction for our future growth and impact.

Guided by that plan, ALT has achieved significant milestones, including:

	<i>2025 Goal</i>	Accomplishments to Date
Program	Collaborating with communities served to co-create solutions to their affordable housing challenges with 300 permanently affordable, energy-efficient 'homes' (units) with a focus on homeownership and the inclusion of limited rental, while advocating for favorable long-term affordable housing policy and funding.	<ul style="list-style-type: none"> 80 homes in trust, 110 units in development and 170+ units identified as future development opportunities Secured passage of referendum providing property tax relief for ALT homeowners
Finance & Fundraising	A sustainable organization with a solid operational model and diversified annual operating budget of approximately \$1.1 million comprised of equal parts earned income and philanthropic funding, and adequate funding (at most -\$14.8M) for land acquisition and development.	<ul style="list-style-type: none"> Raised \$14 million through inaugural capital campaign FY24 operating budget \$750,000 Secured \$1 million line of credit Closed on \$600,000 enterprise loan Closed \$2.3 million forgivable loan with CFGA
Community Engagement & Awareness	A community-centered 'Trusted Partner' with a proven model and capacity that partners with communities in inclusive outreach and engagement to be recognized as the go-to organization for permanently affordable housing in Atlanta.	<ul style="list-style-type: none"> Attended over 100 community meetings & events annually Hosted monthly Community Information Sessions Over 900 homebuyers in pipeline
Operations & Facilities	Headquarters is a CLT facility located in a targeted community and serving as a resource to them, with the needed technology and standard processes and procedures to operate efficiently and effectively.	<ul style="list-style-type: none"> Co-working at Plywood Place in the West End Adopted Program Implementation Manual including 19 policies and related procedures
Human Capacity in Service	Internal capacity to scale and address racial disparities and inequities in housing with seven to eight staff, including employees from neighborhoods served; an 18-member engaged governance Board with both strong community representation and voice; access to needed resources.	<ul style="list-style-type: none"> Seven-member team including 2 interns, 4 full-time staff and 1-part time staff person Fully-populated and engaged board with homeowner and community representation

Scope of Work

ALT is seeking Proposals from experienced consulting Firms capable of working closely with ALT's staff, Board of Directors and other relevant stakeholders to clarify the organization's goals and identify priorities to position the organization for future growth. This strategic plan, supported by research and analysis, will serve as an institutional roadmap to guide ALT and advance the organization's mission over the next five years.

Requested Services

ALT is soliciting Proposals from interested qualified Firms with a documented track record of providing the required services for non-profit organizations and have familiarity with Atlanta and its affordable housing ecosystem. ALT welcomes Proposals from teams with complementary skill sets, including: knowledge of affordable housing development; understanding of shared equity housing programs; and nonprofit strategic planning experience. The anticipated responsibilities of the Firm, if selected to provide these services, will include (but not be limited to) the activities detailed below. Interested Firms are encouraged to propose technical or qualitative tasks and/or deliverables they deem necessary to meet the intent of this RFP.

- **Reaffirm Vision, Mission, and Core Values:** No substantial changes to ALT's mission and vision are expected, but should be reaffirmed as part of this process. The plan will need to distill and codify the organization's core values.
- **Establish Measurable Outcomes and Goals:** The plan must be clear on how success in achieving ALT's mission will be measured – and identify outcomes that can be realistically tracked by the organization. Multi-year (short- and long-term) goals should be established for key outcomes and correlated outputs. Examples may include but are not limited to:
 - Conversion rate (applicant to homebuyer)
 - Time from application to closing
 - Number of units in trust
 - earned income
- **Identify Implementable Strategies:** The plan must identify specific approaches and key initiatives to guide how the organization will spend its time and allocate resources to achieve the desired outcomes. The plan should include a RACI matrix or similar tool to ensure accountability.
 - Standard for quality of homes and standard fee structure for developer-initiated units
 - Streamlined and fully true HomeKeeper
- **Clarify Organizational Priorities:** Several new programs and approaches to the CLT model have been identified over the past five years. The strategic plan should evaluate our current work and these additional programs to define a manageable set of priorities for the organization. The strategic plan should include a framework for determining which work is most aligned and most efficient to allow staff to prioritize and avoid mission creep while remaining open to aligned opportunities.
- **Delineate Conditions for Success:** There are both internal and external factors that impact whether ALT will be successful in achieving its goals. The plan should identify critical success factors for the organization and assess the greatest risks to the plan.
- **Create Frameworks for Decision-Making:** ALT will need to navigate changing economic, socio-political, and financial circumstances. The plan needs to provide guidance on how strategic decisions will be made and which factors are most relevant to making those decisions.

- **Assess Financial Feasibility:** The strategic plan must contemplate attainable funding models to support growth and new responsibilities.

There are key strategic issues the plan will need to address:

- **Organizational Evolution & Capacity Building:** The plan will need to contemplate new organizational structures, operating models, technologies, funding streams, legal agreements, and other areas where ALT will need to build its capacity to achieve the organization's goals. ALT's ability to provide stewardship and consulting services to other CLTs and nonprofits on a contractual basis will be an important consideration.
- **Diversity, Equity, and Inclusion:** ALT's strategic plan should identify actions ALT needs to take to ensure diversity, equity, and inclusion are embedded throughout the organization's people, programs, and processes.
- **Human Capital:** ALT has leveraged a network of partners, contractors, and volunteers (including board members and pro bono services) to achieve significant results with relatively few full-time staff. The plan should include a decision matrix or other strategic way for the organization to determine the most effective division of labor between full-time staff, contractors/part-time staff, partners, and volunteers/board/pro-bono services.
- **Funding:** The plan should identify sustainable, long-term funding strategies to support ALT's programs, operations and projects, including conservative and stretch goals for each and the conditions ALT will need to meet to successfully pursue them. This is not intended to be a fundraising feasibility study but rather will identify potential earned income strategies, not specific funders.
- **Relationships/Partnerships:** The plan should identify key strategic relationships/partnerships that will need to be established to achieve the organization's goals.
- **Development Areas of Focus/Programmatic:** The plan should provide a framework for decision-making around land acquisition and/or partnership strategies.

The Firm is expected to review background materials, including but not limited to:

- Current [Strategic Plan](#)
- [Annual Year in Review, quarterly newsletters and news clippings](#)
- [2023 State of the Organization](#)
- [Properties Board](#)
- Program Implementation Manual
- Audited financial statements

The Firm is expected to conduct specific activities that will inform the strategic plan, including:

- SWOT analysis or similar assessments of programmatic output and ALT as a whole
- Surveys and/or interviews with key stakeholders, including homeowners, donors, partner organizations, elected officials, neighborhood leaders, community members, board members, and staff
- Comparative analysis of ALT to similarly situated CLTs or similar organizations in other parts of the country

- Landscape analysis of housing affordability, homeownership, and political climate in the City of Atlanta

ALT must be able to operationalize the strategic plan. The engagement does not include the development of a business plan, but the Firm is expected to provide a foundation that ALT can use to develop its annual workplans. This foundation should include but is not limited to the following tools (or equivalents proposed by the Consultant):

- Key Performance Indicators with identified data sources
- Dashboards that can be used to track progress against the plan
- Framework for determining the return on investment (ROI) of different programs and evaluating competing programmatic priorities
- Framework/decision matrix for evaluating the alignment of new opportunities with the strategic plan

Engagement Structure

ALT anticipates the following engagement structure, though Firms have the flexibility to recommend modifications to deliver the best possible plan:

- Duration of 6 months
- Beginning of project focused on finalizing scope and project plan, absorbing background materials, and securing stakeholder input
- Firm should plan to provide regular (at least monthly) written updates outlining work performed for month, progress to date, and anticipated activities for the succeeding month
- ALT staff will be actively engaged:
 - Consultant should propose what it deems to be an appropriate schedule of work sessions/meetings as part of its proposal, which will be refined when finalizing the scope and project plan at the beginning of the engagement
 - ALT's Executive Director will be available to make critical path decisions throughout the duration of the engagement
- There will be active participation by ALT's board of directors:
 - Executive Committee will serve as a strategic planning committee
 - Committee structure will be used to secure board input on relevant portions of the plan (Existing committees are: Executive, Community Engagement & Stewardship, Project Development, Finance & Audit, Fundraising & Resource Development)
 - Consultant to lead a strategic planning retreat with the board and secure input via a survey and/or other tools
 - Full Board will provide final approval of the strategic plan
- Consultant will create a professionally laid out Executive Summary of the strategic plan that can be shared with homeowners, donors, elected officials, community members, and other key stakeholders
- Consultant to handle logistics related to scheduling interviews, preparing for meetings (virtual meeting platforms, physical locations, developing agendas, bringing supplies, etc.). ALT staff will provide contact information for key stakeholders and assist where we have information or materials that the Firm does not have.

Request for Proposals Process Timeline

Request for Proposals Issued: January 6, 2025

Information Session: January 17, 2025

Questions Due: January 24, 2025

Any questions regarding this procurement must be submitted in writing to the Executive Director, Amanda Rhein, via electronic mail at arhein@atlandtrust.org, on or before January 24, 2025 at 5:00 pm. All questions and answers will be posted to the Atlanta Land Trust website at atlantalandtrust.org.

Responses to Questions Posted: January 31, 2025

Submission Deadline: February 28, 2025

ALT anticipates the following additional timelines, although these dates may change, in the sole discretion of ALT.

Ranking/Evaluation of Proposals: March 21, 2019

Proponent Interviews: March 31-April 4, 2025

Award Notification: April 30, 2025

Submission Procedures and Requirements

Format and Content of Proposal

Proponents must submit a Proposal in response to this RFP in the format specified herein. The Proposal must consist of the following:

1. Title Page: Show the RFP's subject, the Firm's name, address, website, email and telephone number of the contact person(s) and the date of the Proposal.
2. Table of Contents: Include a detailed table of contents listing sections and subsections that correspond to the requirements of the RFP. The table of contents must also list all tables, appendices, figures, etc. contained in the Proposal.
3. Executive Summary: Generally describe the Firm, provide an overview of the qualifications and a statement of why Firm is interested and best qualified to provide the scope of services. The Proposal must include: (a) the domicile where Firm(s) is organized, (b) the name, brief history, contact name, address, email contact, phone number, and facsimile number of the Firm, (c) the legal structure of the entity, (d) proof of ability to do business in Georgia, and (e) a listing of major satellite offices, if any.
4. Organizational Structure and Key Personnel: Include an organizational chart of the Firm's management structure and corresponding resumes for each of the individuals identified. In the case where the Firm is a partnership or affiliation of two or more firms, please provide information for all participants and the nature of the relationship. Also, indicate who will be the proposed lead person on the strategic plan and their availability to commence work on the strategic plan following an award.
5. Experience and Qualifications: Describe relevant experience completing strategic plans, specifically for community land trusts or other affordable housing nonprofits. Also include technical competence of each Firm and any sub consultants. Up to two work samples may be included as attachments to the Proposal and may include reference contact information.
6. Project Approach: Describe the Firm's proposed approach to this strategic planning process. This response should include the specific tasks and deliverables which will be provided to accomplish each outlined phase of the scope of work. The Proposal should also describe the Firm's approach and methodology used to perform the scope of work, specifically addressing recommendations for a sustainable and effective future, and clear understanding of the Atlanta Land Trust's mission, principles and areas of work.
7. Fee: Proposed project budget for the services contemplated in the scope of work. ALT has budgeted up to \$100,000 for this strategic planning process.
8. Schedule: Proposed schedule and work plan for the accomplishment of the scope of work.

Submission of Proposal

Proposals must be submitted according to the requirements of this RFP. Proposals shall be signed by a principal of the Firm with the authority to bind the Firm and enter into an agreement with ALT. Each Firm is responsible for the preparation of its Proposal and for the cost associated therewith. Proposals Statements

are to be submitted in an unlocked Portable Document Format and may be submitted electronically via email to arhein@atlandtrust.org.

All submissions must be received by Atlanta Land Trust by 3:00 p.m. EST. It is the responsibility of each Firm to obtain a copy of any addendum issued for this RFP by monitoring ALT's website.

This procurement does not constitute an offer by the ALT to enter into an agreement and cannot be accepted by any Firm to form an agreement. This procurement is only an invitation for offers from interested Firms and no Proposal shall bind ALT. Each Proposal submitted to ALT will become the property of ALT for ALT's use, in ALT's sole discretion. ALT reserves the right to reject any Proposal or all Proposals or to waive any technical defect in a Proposal before or after submission. ALT also reserves the right to cancel this RFP at any time for any reason or no reason. Additionally, ALT may in accordance with applicable law, by addendum, modify any provision or part of this RFP at any time prior to the Proposal due date and time. Any Proposal submitted pursuant to this RFP will be effective for a period of not less than six (6) months.

Evaluation and Selection Process

Upon receipt and review of the Proposals, ALT, at its sole discretion, shall evaluate and determine which Firm, if any, is responsive and responsible and in ALT's best interests to accept. Once all Proposals are received, ALT will convene an evaluation committee which will evaluate each responsive Proposal in accordance with the evaluation criteria described in this RFP. Firms may be required to make an oral presentation to the evaluation committee at any stage of the selection and evaluation process. ALT will notify each Firm of ALT's determination.

Proposals will be evaluated based on the evaluation criteria described below:

1. **Project Experience:** Proposal shall demonstrate the Firm's industry expertise and experience in developing strategic plans of a similar scope for similar organizations. Subject matter expertise in affordable housing development and shared equity housing programs will also be taken into consideration.
2. **Organizational Structure and Key Personnel:** Proposal should provide clear evidence that the Firm has the appropriate personnel in place to successfully complete the scope of work.
3. **Project Approach:** Proposal should demonstrate a commitment to working collaboratively with ALT and stakeholders to develop an innovative, effective strategic plan within a reasonable timeframe.
4. **Project Budget:** Proposal shall demonstrate the ability to deliver a strategic plan in a cost-effective manner for ALT.

The highest-ranked Firm will be recommended by the selection committee to the Board of Directors of the Atlanta Land Trust for the award of the contract for strategic planning services. ALT's Board of Directors reserves the right to accept, modify or reject the recommendation of award under this RFP. Once Board of Directors approval has been received, ALT will proceed with negotiations of a mutually acceptable contract for services.