



Request for Proposals

FOR STRATEGIC PLANNING SERVICES

AUGUST 19, 2019

112 KROG ST NE #14
ATLANTA, GA 30307

404.257.6866
ATLLANDTRUST.ORG

Contents

Overview 2

Scope of Work..... 4

Request for Proposals Process Timeline 5

Submission Procedures and Requirements 6

Evaluation and Selection Process 8

Overview

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

The mission of ALT is to deliver and steward permanently affordable housing proximate to the Atlanta BeltLine and other targeted areas in the city of Atlanta. ALT will also create a favorable climate for community land trust (“CLT”) development, strategically assemble land, and provide fee-for service stewardship to other entities.

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 is spearheading the implementation of a city-wide CLT to:

- Provide low-and moderate-income residents access to land and housing;
- Increase long-term community control of neighborhood resources;
- Empower residents through involvement and participation; and
- Preserve the affordability of housing permanently.

ALT is at a critical juncture. In 2018 the ALT Board of Directors secured resources to relaunch the organization following several years of assessment, planning and resource development. This included the critical step of hiring full-time staff. An Executive Director was hired in August 2018 and is now preparing ALT to enter into the rapid growth phase in its evolution.

A CLT is a nonprofit organization that utilizes public and private funds to provide affordable homeownership opportunities for low-income households. The CLT model helps low-and moderate-income families benefit from the equity built through homeownership, and at the same time preserves the affordability of these homes so that future residents will have the same affordable homeownership opportunities. A CLT generally structures ownership in several distinctive ways:

- Land is treated as a common heritage, not as an individual possession. Title to multiple parcels is held by a single nonprofit owner that manages these lands on behalf of a particular community, present and future.
- Land is removed permanently from the market, never resold by the nonprofit owner. Land is put to use, however, by leasing out individual parcels for the construction of housing, the production of food, the development of commercial enterprises, or the promotion of other activities that support individual livelihood or community life.
- All structural improvements are owned separately from the land, with title to these buildings held by individual homeowners, business owners, housing cooperatives, or the owners of any other buildings located on leased land.

- A long-term ground lease gives the owners of these structural improvements the exclusive use of the land beneath their buildings, securing their individual interests while protecting the interests of the larger community.

Scope of Work

ALT is seeking Proposals from experienced consulting firms capable of working closely with ALT's Executive Director, 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 will serve as an institutional roadmap, supported by research and analysis, to guide ALT and advance the organization's mission over the next five years. In order to become a sustainable organization, we must increase and diversify funding by identifying earned income opportunities and building our capacity for operations.

ALT is interested in identifying creative solutions and approaches that have not been tested in Atlanta. Firms will be encouraged to explore national precedents and innovative ideas that push the boundaries of what a community land trust can accomplish.

ALT is soliciting Proposals from interested qualified Firms with a documented track record of providing the required services. The anticipated responsibilities of the Firm, if selected to provide these services, will include (but not be limited to) the activities detailed below. ALT encourages those applying to be creative in the process to achieve the identified goals. Interested Firms are encouraged to propose technical or qualitative tasks and/or deliverables they deem necessary to meet the intent of this RFP.

Phase 1: The initial phase of work will include a review of existing data and documents to provide an understanding of the present state of the organization and the affordable housing landscape in Atlanta. This phase will also include a kick-off meeting with staff and the Board of Directors with the purpose of refining and validating the scope, schedule and approach. This meeting should also include the review and confirmation/revision of ALT's mission, vision and values.

Phase 2: This phase will focus on the development of the critical inputs to the plan through stakeholder engagement, research and analysis. This phase may include best practices review, SWOT analysis, and stakeholder interviews. A critical component of the plan will be the review of existing revenue sources and identification of earned income opportunities.

Phase 3: The final phase will focus on drafting, testing and refining the strategic plan and an implementation framework, to include timelines, resource requirements and organizational model. These documents will be presented to staff and the Board of Directors prior to finalization and adoption. The final deliverable will be a professional, visually appealing strategic planning document that clearly identifies actionable goals for the organization.

Request for Proposals Process Timeline

Request for Proposals Issued:	August 19, 2019
Questions Due:	September 6, 2019
<i>Any questions regarding this procurement must be submitted in writing to the Executive Director, Amanda Rhein, via electronic mail at arhein@atllandtrust.org, on or before September 6, 2019 at 5:00 pm. All questions and answers will be posted to the Atlanta Land Trust website at atlantalandtrust.org.</i>	
Responses to Questions Posted:	September 13, 2019
Submission Deadline:	September 27, 2019

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

Ranking/Evaluation of Proposals:	October 4, 2019
Proponent Interviews:	October 14-18, 2019
Award Notification:	October 18, 2019

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 and fax numbers 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 his/her 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.
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.
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 hand 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 or delivered to the ALT offices on a USB drive at:

Atlanta Land Trust, Inc.
112 Krog Street, Suite 14
Atlanta, GA 30307
arhein@atlandtrust.org

All submissions must be received by Atlanta Land Trust by 3:00 p.m. EST either by delivery or email submission. 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.
2. **Organizational Structure and Key Personnel:** Proposal should provide a 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.