

Strategic Plan Request For Proposals

HOMES, Inc.

Purpose:

Housing Oriented Ministries Established for Service, Inc. (HOMES, Inc.) is seeking proposals from qualified vendors to develop a comprehensive strategic plan for our organization. Vendors should have proven experience facilitating non-profit strategic planning and a demonstrated understanding of the needs of the Appalachian/Eastern Kentucky region.

Table of Contents:

_____ *Section I: Organization/Project Overview & Deliverables*

_____ *Section II: Proposal Format*

_____ *Section III: Scoring & Submission*

RFP released: 3/13/2025

Proposals due: 5:00 PM ET, 4/11/2025

Selection anticipated by: 5:00 PM ET, 5/2/2025

Contact Information: Inquiries concerning this RFP should be directed to Seth Long

- Executive Director
- Seth.long@homesinc.work
- (606) 632-1717

Section I:

Organization/Project Overview & Deliverables

About the Organization:

HOMES (Housing Oriented Ministries Established for Service), Inc., is a non-profit Community Housing Development Organization committed to providing affordable, sustainable housing solutions in Eastern Kentucky and Southwest Virginia. For decades, HOMES has used in-house construction crews to build hundreds of energy-efficient new homes, repaired thousands of existing houses, and developed 62 units of rental housing.

An explanation of HOMES would be incomplete without mentioning the catastrophic flooding event that devastated the community on July 28, 2022. While no one would ever want to experience the tragic loss of life and property that the event brought, the flood also brought opportunities for positive changes.

One of the changes is that housing is now a key priority for local leaders in the community. In the past, the lack of decent housing was such a high need and the investment to deal with the housing problems was so low that many community leaders gave up hope in addressing housing issues in a meaningful way. When the flood wiped out 25% of the already limited housing stock, and HUD committed 298 million dollars to address housing and infrastructure problems, housing quickly became the number one issue on the list of priorities of local leadership. With HOMES already established as the only developer of housing in Letcher County, local and state leadership has looked to HOMES to take the lead in much of the rebuilding efforts.

Before the 2022 flood, HOMES' strategic planning efforts were handled in-house. While effective for the organization's previous needs, these plans were not dynamic in helping navigate HOMES' rapid growth. HOMES has increased production and staffing by more than 300% compared to pre-flood activities, with a pipeline of anticipated activity including development of Team Kentucky High Ground housing and other DLG disaster rebuilding projects in Eastern KY. The very recent February 2025 flooding in Pike County and other EKY communities has further exacerbated the need for housing, and HOMES recognizes that responding to the region's housing need requires strategic preparation and assessments of funding and organizational opportunities.

Looking forward to the next five years, HOMES plans to more than double its production of new home construction, increase its home renovation work to meet the demand, apparent via its waiting list, and scale up its solar production to allow for one full-time installation crew of 2-3 employees. To meet these goals, there are certain challenges to address in HOMES' current operations. The organization needs to think differently about the current structure and grow its administration staff. The organization needs more depth of bench to handle the administration aspect of the work, including compliance and reporting. HOMES needs skilled staff to diligently seek other avenues of funding and

clearly communicate the organizations' achievements externally to help elevate and promote the organization, to support connecting with additional funding opportunities.

The 2022 flooding event changed everything for HOMES, bringing the organization both new challenges and new opportunities. With the support of a consultant, the timing is right for HOMES to engage in a new strategic planning effort to focus the organization's growth and address the extraordinary opportunities that lie ahead. HOMES remains committed to expanding its current capacity to meet the region's needs. To achieve this, HOMES is seeking to develop a comprehensive strategic plan that will guide its growth, ensure sustained focus, and effectively address the challenges associated with rapid expansion.

Project Overview: The purpose of this Request for Proposals (RFP) is to engage a qualified consultant to develop a comprehensive strategic plan for HOMES, Inc. As a nonprofit dedicated to creating affordable and sustainable housing solutions, HOMES aims to increase its impact in the communities it serves. Vendors should have proven experience with non-profit strategic planning and a strong understanding of the housing sector in the Appalachia/EKY region. The strategic plan should inform the development of successive plans.

HOMES is interested in a collaborative process that engages stakeholders, assesses community needs, and identifies key opportunities for growth and innovation. The resulting plan will be instrumental in shaping HOMES' programs, securing funding, and fostering partnerships that amplify our organization's reach and effectiveness.

Scope of Work and Deliverables: HOMES, Inc. is seeking to engage a qualified consultant to develop a strategic plan to support affordable housing development over the next five years (approximate calendar years 2026-2030). The final deliverable should present the following information as a report with an attached executive summary.

1. Development and Presentation of Strategic Plan

- a. *Executive Summary:* Comprehensive strategic plan document should include an executive summary outlining:
 - i. Vision, mission, and values statements
 - ii. Strategic goals and objectives for the next 5 years (FY 2026-2030)
 - iii. Proposed implementation plan with timelines and responsibilities
- b. *Needs Assessment:* Conduct needs assessment with stakeholders to identify areas of growth (staff, community members, board, etc.)
- c. *Risk Mitigation:* Strategize ways to mitigate roadblocks such as funding challenges, capacity gaps, and areas needing technological solutions.
- d. *Personnel Resource Identification:* List potential partnership opportunities to expand the organization

- e. *Presentation*: Present findings and recommendations to the board and key stakeholders

2. Staffing Plan

- a. *Workforce Analysis*: Assess HOMES's current operations and staff capacity to identify areas for improvement
- b. *Future Roles*: Identify new or evolving roles needed as the organization grows and its programs expand. Create detailed job descriptions for new roles such as project managers or other key personnel.
- c. *Succession Planning*: Provide succession planning recommendations for key leadership roles within the organization.

3. Financial Projections and Budgeting

- a. *Cost Analysis*: provide breakdown of initial and ongoing organizational costs and identify any potential cost savings or efficiencies that could be realized over time.
- b. *Financial Sustainability*: Long-term strategies to ensure financial health and sustainability, including identifying future/potential funding opportunities and sources (i.e. grants, loans, tax credits)
- c. *Service Area Analysis*: Provide analysis of organizations' lines of business and service areas for effectiveness/areas of improvement (i.e. new home construction, home repairs, flood repairs, community improvement). Offer recommendations for areas of potential growth or re-prioritization based on community needs, demographic changes, or market trends.
- d. *Budgeting and Allocation*: Recommendations on how to allocate budget across all aspects of HOMES' initiatives. Provide clear recommendations for prioritizing resources and suggest tools for monitoring budget performance and adjusting financial plans as necessary.

Section II: *Proposal Format*

Proposal Format:

1. *General Vendor Information*
 - Name, title, contact information (address, phone, email)
 - Identification of the main point of contact
2. *Consultant qualifications and roles*
 - For each member of the project, please detail expertise, knowledge, and experience with related work/nonprofits.
 - Preference will be given to vendors with the following qualifications:
 - Successful track record of strategic planning for non-profits
 - Expertise in financial planning and budget development
 - Familiarity with affordable housing development and socio-economic challenges/opportunities in the Appalachian region
3. *Examples of previous work*
 - a. Two examples of previous, similar work showcasing experience in strategic planning for nonprofits. Provide measurable outcomes or highlight any successes and ongoing projects that illustrate your work.
4. *Suggested Work Plan*
 - A detailed description of suggested activities to be conducted by the consultant including timelines, major tasks, and projected milestones.
5. *Expense Detail*
 - a. Detailed cost breakdown for any anticipated expenses for services (i.e. travel, research).
6. *References*
 - At least three written references from clients or partners who can speak to the vendor's ability to execute strategic plans of similar sizes and scopes.

Section III:

Scoring & Submission

Scoring: HOMES, Inc. will select the bidder based on the proposal offering the best value and highest quality. Criteria are as follows:

1. Work Plan – 35%
 - a. The proposal comprehensively outlines project activities and milestones and includes a detailed timeline.
2. Qualifications – 25%
 - a. The vendor has the necessary qualifications to complete the scope of work including, but not limited to, prior work on similar projects or experience with nonprofits.
3. Scope of Proposal – 25%
 - a. The proposal demonstrates an understanding of the objectives and deliverables and remains in compliance with the proposal outlined above
4. Familiarity with nonprofits and/or the Appalachian region – 15%
 - a. Demonstrated understanding of nonprofits and strong understanding of needs/challenges/opportunities specific to the Appalachian region.

HOMES, Inc. reserves the right to request a meeting with any bidder to negotiate modifications to the proposal.

Process for Proposal Submission & Evaluation:

Due Date: Proposals are due by 5:00 PM EST on 4/11/2025.

Submission Instructions & Details:

1. Proposals should be submitted in a PDF or Word format via email to Seth.long@homesinc.work before the closing submission date. The email subject line should be as follows: "HOMES Strategic Plan Bid 2025 - [Name of Vendor]."
2. *Submissions received after the due date or mail-in submissions will not be accepted or reviewed.*
3. RFP submissions will be reviewed by HOMES, Inc., and a vendor will be selected by HOMES, Inc.

Notification of Selection and Timeline:

HOMES, Inc. will review and select a bidder within six (6) weeks of the closing submission date, although this timeline is subject to change. All bidders submitting responses to this RFP will be informed of their status following internal review.

Right to Reject: HOMES, Inc. reserves the right to reject any and all proposals received in response to this RFP.

Small Businesses, Minority-Owned Firms, and Women's Enterprises: HOMES, Inc. will make efforts to utilize small businesses, women's business enterprises, and/or minority-owned businesses. A bidder qualifies if it meets the criteria of 51% owned and controlled by the aforementioned identity.

Conflict of Interest: The vendor must disclose, in an exhibit, any possible conflicts of interest that may result from the award of the contract. Unless otherwise specified, the vendor affirms that to the best of its knowledge, there exists no actual or potential conflict between the vendor and its employees and their families' business or financial interests. In the event of a change in either interest, the vendor will inform HOMES, Inc. regarding possible conflicts of interest that may arise as a result of such a change. Conflicts of interest may include giving or offering gratuity, money, gift, or anything of value to an individual employed by HOMES, Inc. with the intent to receive favorable treatment in the bidding process.

Ownership & Confidentiality: All intellectual property will become the property of HOMES, Inc. All data remains the sole property of HOMES, Inc. The vendor agrees to keep information related to all contracts with HOMES, Inc. strictly confidential.