



## **Request For Proposals Organizational Planning Services**

The California Coalition for Community Investment (CCCI) seeks a consultant or firm to support us in making key foundational decisions about the development of our coalition. Formed in 2019 as a voluntary coalition of Community Development Financial Institutions (CDFIs) based or active in California, CCCI wishes to build on our early successes in advocacy and network formation by undertaking a broad consultation to align on the next phase of our organizational evolution. The desired outcome of this consultancy is to set a course for CCCI to become the most impactful and highest-functioning version of itself, including more clearly defining our common purpose as articulated by mission, vision, and values statements; aligning around what we hope to accomplish for our members, in the short and long term; and determining what type of institution will best be able to deliver on those aspirations.

### **About CCCI**

The California Coalition for Community Investment (CCCI) is an emerging statewide coalition of CDFIs that are engaged in community-driven lending and provision of technical assistance. Our coalition is committed to supporting and expanding the work being done by CDFIs to advance racial and economic justice within the communities they serve. We do this by advocating for state policies that expand access to capital and create opportunities and resources that build equitable and inclusive communities throughout California.

### **Organizational Context**

CCCI is a fiscally sponsored project led by an Executive Committee made up of selected representatives of member organizations, supported by a standing Policy Committee and ad hoc committees as needed. CCCI is registered as a lobbying coalition with the state of California, and contracts with Public Interest Advocates, a public policy firm, which provides advocacy and administrative support. CCCI does not currently have staff of its own. The Coalition currently has over 45 organizational members, roughly half of the 119 CDFIs active in the state.

### **How We Got Here and Where We Want to Go**

We believe this is the right moment to map out and make decisions on the next steps for our coalition. CCCI was initially formed in 2019 around a broad set of objectives identified by about a dozen founding member CDFIs. The organization achieved a significant early legislative

victory when it spearheaded the passage of the California Investment and Innovation Program, a state-level CDFI fund that was enacted in 2022. We have since held annual member summits and legislative advocacy days, building an active and engaged membership base. While these successes have raised the visibility of the coalition with policymakers and generated interest among the membership to deepen our collective impact, the coalition is also encountering the limits of what can be accomplished as an informal, primarily volunteer run coalition.

At the same time, we have seen a wave of national interest in CDFI advocacy coalitions at the state level. Roughly a dozen other states have formed CDFI coalitions, and several have succeeded in securing dedicated funding from their state governments. The new President of the national CDFI trade association, Opportunity Finance Network (OFN), has committed to supporting and partnering with these emerging associations. With momentum both internal to our coalition and in the external environment, now is the time for us to define a path forward as an organization.

### **Key Questions/ Areas to Explore**

Through deep listening with CCCI's Executive Committee, current and prospective membership, and stakeholders including policymakers, impacted communities, and prospective funders, the consultant will help us reach clarity on major questions facing our development, some of which are listed below.

- Where is there alignment among members regarding the purpose and mission of the coalition, and where are their differences?
- What is the current value of the coalition to members, and what additional value could it offer?
- What should the scope of the organization's advocacy activities be? Should this be focused solely on resourcing the work of CDFIs, or should it extend to policies that support community development generally?
- Where does the coalition fit into the landscape of related initiatives? Specifically, how should it relate to the national CDFI trade organization, Opportunity Finance Network, and to other statewide coalitions formed around related themes including affordable housing, small business, and nonprofit organizations?
- Would incorporating the coalition significantly advance its mission? If so, what corporate forms should it consider?
- What would be the financial implications of any decisions around staffing and incorporation? What are the prospects for funding the coalition's work?
- How should the organization's governance be structured? Does a membership model serve the organization's goals and if so what role does the membership have in determining governance? What models of governance should CCCI consider to ensure governance that is inclusive and sustainable?

### **Desired Outcomes/ Engagement Goals**

- Gain a deeper understanding of the aspirations that California CDFIs, including CCCI members and non-members, have for a statewide coalition

- Develop a clear and compelling expression of the coalition's purpose, in the form of revised mission and vision statements, a theory of change, or similar
- Engage policymakers to understand current perceptions of CCCI and opportunities to deepen its effectiveness as an advocate
- Draw relevant lessons from the experience of other state CDFI coalitions, as well as peer advocacy coalitions in California
- Develop options and recommendations on CCCI's organizational evolution, with respect to incorporation, organizational structure, governance, funding, and staffing
- Set goals and milestones for the next year of the coalition's development
- Develop a framework for setting goals and milestones over time

### **We would like your proposal to include**

- Your client engagement approach and methodology
- A summary of your planning and consulting experience, including any of the following that may be relevant:
  - Experience supporting organizations to define their mission, vision, and values
  - Experience with strategic planning or nonprofit business planning, especially nonprofits policy, advocacy or coalitions or trade associations.
  - Knowledge of and experience in community development, particularly related to communities of color and/or low-income communities in California
  - Experience working with advocacy coalitions and/ or membership organizations
- Qualifications of your team who will be involved with the project
- A rough project timeline with major tasks, milestones, and budget (we anticipate a detailed timeline and budget to come out of the discovery phase with deliverables that align with project budget and payments)
- Onboarding and scoping process including materials needed for you to develop your full scope of work, engagement plan and contract
- Estimated consulting fee and additional expenses
- A past client list and three relevant client references
- At least 1 sample of a previously completed strategic plan or similar output that shows content, tools and presentation of the final work product. Portions may be redacted as needed.

*\*If you aren't able to include any of the above, please tell us why in your submitted proposal*

### **Some key qualifications that will be considered**

- Experience in successfully developing strategic plans, opportunity assessments, or similar planning products with mission driven organizations
- Strategies for gathering and utilizing a broad range of inputs to drive the strategic process
- Ability to constructively challenge key stakeholders
- Strength of facilitation and interviewing skills

- Knowledge of community development and community development finance is welcome, but not necessary
- Experience working with legislative advocacy organizations is welcome, but not necessary

### **Timeline**

- RFP released: April 12th, 2024
- Proposals due by e-mail to [info@calcci.org](mailto:info@calcci.org): May 13th at 5pm PST.
- Proposal review and interviews: May 13- May 31
- Notification of acceptance: June 27-31
- Discovery phase: Up to four weeks
- Project completion: Three to five months

### **Budget**

The proposed budget is \$50,000. Please include your estimated fee and additional expenses. Should your estimate differ materially from the proposed budget, please tell us why in your submitted proposal.

### **Submission**

Please send your proposal to [info@calcci.org](mailto:info@calcci.org). You may also e-mail the same address with any questions, or to set up a 30 minute Zoom call with the CCCI project lead to discuss the RFP.