



**Emerald Cities Collaborative
Request for Proposals
Strategic Planning Consultant
Issued May 25, 2023**

The Emerald Cities Collaborative (ECC) is seeking a strategic planning consultant who can work with the Board of Directors and staff in the design and implementation of a strategic planning process. Emerald Cities wants to develop a strategic plan for the next five years, from 2024-2029.

ECC is looking for proposals that describe a planning process that is collaborative, involving every level of the organization. This will ensure buy-in, facilitate alignment around the strategies, and assure successful execution of the strategies. The organization will form a joint board and staff strategic planning committee to shepherd the process. Also, the successful consultant will be asked to synthesize information from business planning processes that are either completed or underway. The consultant will work with the Chief Strategy Officer during every phase of the process.

Proposal Guidelines

Proposals, following the format below, must be submitted by June 12, 2023 at 12pm (ET). Proposals must be submitted electronically in one .pdf document via email to Daryl Wright, Chief Strategy Officer, at dwright@emeraldcities.org. Questions must be submitted via email to Daryl Wright by June 5, 2023 at 12pm (ET). Responses will be provided to all possible respondents after the question deadline.

Format for proposals:

- **Planning Methodology** that responds to the Roadmap elements outlined in the memo. ECC is open to new ideas that will enhance the strategic planning process and plan. Proposals should be no more than five pages with a one page executive summary. The summary is not part of the page count.
- **Cost Proposal.** This should include budget assumptions and cost considerations that could lead to a larger or smaller budget amount.
- **Timeline** that provides a high level overview of the strategic planning process timeline.

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/1>

- **PowerPoint Summary.** Please provide two slides that introduce your firm and methodology. The slides from the top two to three consulting firms will be presented to the ECC Board of Directors on Jun 22, 2023.

BIPOC and women-led consulting firms are strongly encouraged to apply.

Context

Emerald Cities Collaborative (ECC) is at a unique crossroads. Its earned reputation for outstanding work in policy and implementation led to a one-time influx in funding that allowed for 200% growth in the midst of executive leadership change and a political landscape that has put ECC's long-held ideals of equity and climate justice front and center. What a moment!

ECC's current strategic plan, the "Strategy Refresh" sunsets on December 31, 2023. The Strategy Refresh has been the guiding document for ECC since March 2022 when it was approved by the Board as a stopgap measure to guide the organization in the midst of an executive leadership transition. This also occurred as ECC's operating environment shifted significantly. When the last full plan was conceived, there was a contraction of opportunity in light of a federal policy environment hindered by the Trump Administration. By 2021, the situation was reversed. There was an expansion of opportunity brought on by the national racial reckoning after the murder of George Floyd and the election of President Joe Biden. ECC's Board felt it would be prudent to establish a direction until the new incoming executive leader settled into the organization. Once the transition period was over, she could take ownership of a new planning process that she could influence. With Meishka Mitchell in place as the President & CEO for one year, the Strategy Refresh has run its course having fulfilled its purpose. This is also a period of deep reflection for the ECC staff as they reflect on the purpose, mission and vision of the organization.

The next strategic plan will set the organizational direction for the next five years, with a formal, comprehensive strategic review after three years. There will be ongoing operational review of the plan, at least twice a year. The vision is for the plan itself to be a living document, an

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/2>

important point of reference for the organization.

Strategic Planning at Emerald Cities Collaborative

Strategic planning at ECC comes at a time when the organization continues to expand its work with frontline communities and other partners. These efforts have dovetailed with federal policy focused on directing federal benefits to frontline communities while mitigating harms - the [Justice40 Initiative](#). The Emerald Cities Collaborative continues its work with frontline communities, local and state jurisdictions, and the corporate sector within the new energy economy. This includes promoting equity, energy democracy and community benefits through economic inclusion and civic infrastructure programs.

Strategic Roadmap 2024-2029

The strategic planning process will help the organization define what it means to grow intentionally, operate collaboratively, and increase its influence, impact, and the quality of program implementation. *the following categories of work have been identified by ECC for inclusion, but ECC is also open to new ideas on format, process and timeline from the expertise of the strategic planning consultant*

- 1) Prioritizing the critical social need(s) –
 - a) Identify ECC’s target audience(s)
 - b) Review and validate purpose, mission, values
 - c) Gather data about the external environment in terms of how Emerald Cities will realize its purpose, implement its mission and get closer to realizing its vision of thriving frontline communities. This information will likely come from board members, funders, and other stakeholders. This will include data from government sources as well.

- 2) SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis – The organization is operating in an uncertain environment. Recent events in the banking industry and talk of recession can affect the funding environment. Politically, shifts in who is in power in the legislative and executive branches threaten to halt the implementation of policies aimed to address harms and create benefits in frontline communities. A clear, steely-eyed view of this environment and how we navigate the potential realities of rapid contraction or expansion of resources will be key to our effectiveness as an organization. The SWOT analysis includes:
 - a) Identifying current trends and policy issues that impact operations, program

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/3>

- development;
 - b) Conducting environmental scan; and
 - c) Determining what makes ECC unique.
- 3) Operations and Evaluation – ECC wants to incorporate a robust system for program evaluation to better track and understand its performance over time. ECC is in the initial stages of building out Salesforce as a tool to streamline work activities and to track program performance. This is one example of how the organization is working towards operational alignment in relation to strategy. Identifying lessons learned from our years of experience implementing programs and outlining important questions about what we can learn from initiatives will help the organization chart a course for its next stage of innovation.
- 4) Design systems-focused program strategies – ECC has developed a set of program strategies that are working well. The challenge will be to design them in ways that foster systems change. We will do this by strengthening implementation, increasing our influence over policy and practices, broadening our impact, and sparking innovation during the next phase of growth. Identifying the organization’s priorities in these areas will require deliberation between the board, staff and other stakeholders. Two processes are underway. They will feed into strategic planning:
- a) Advisory Services and Contractor Development Business Planning – Advisory Services is in the middle of a business planning process and a RFP for contractor development has recently been issued. Both planning processes will help the organization gauge what’s needed in these early-stage efforts. For Contractor Development, the planning process will provide important information about promising practices in contractor development and map national and regional assets for contractors participating in the E-Contractor Academy programs. The Advisory Services Plan will set the stage for questions about pricing for our services, positioning ourselves within key market segments and building the necessary infrastructure required to maximize earned revenue.
- 5) Creating measures and outcomes to guide implementation of the plan – The plan should be a living document. Accountability to the plan through jointly developed key performance indicators (KPIs) will help the organization track its progress in relation to the plan and make adjustments if necessary. Integrating measures into the planning process will strengthen execution of strategy, setting the stage for active engagement of

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/4>

staff and board.

- 6) Financial and administrative survey – As ECC has grown exponentially in the past 2 years, a lot of attention has been given to strengthening ECC’s administrative challenges. Assessing our financial and administrative strength in relation to our role in the world ensures we are building the internal capacity to carry out our mission with integrity. The survey helps ECC to identify the financial resources needed to execute the strategy. This survey charts a course towards developing our capacity to effectively manage these resources over the next five years.
- 7) Fund Development – All these efforts will come from a successful fund development strategy, with Bezos funding, ECC has been able to build its capacity to support frontline communities. Developing a strategy to fund national and regional initiatives while staying true to our purpose, mission and vision will ensure we have the capacity to sustain these gains.

Keys to success

The strategic plan must be approved by the ECC Board of Directors. That said, we should aim to make this a collaborative process, involving every level of the organization. This will ensure buy-in, facilitate alignment around the strategies, and assure successful execution of the strategies. We should consider a joint board and staff strategic planning committee to shepard the process.

Other planning processes will be integrated into strategic planning. This will include:

- Contractor Development Business Plan
- Advisory Services Business Plan
- Southern California/ SoCal Regional Energy Network Business Plan from 2022
- Team Work Plans for FY2024

Process and Timeline (For Reference Only)

Task	Timeline	Outcome
Develop a strategic planning budget	May, 2023	Budget for new fiscal year July, 2023
Draft, complete and	Draft - May 12	Disseminate RFP to

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/5>

disseminate RFP for a strategic planning consultant	Final - May 15, 2023 Disseminate - May 15, 2023	consultants; includes targeted outreach to prospective consultants
Hire a strategic planning consultant	Jun 1, 2023	Have a consultant in place to lead the strategic planning process
Form a Strategic Planning Committee composed of Board and Staff	June 21, 2023	Organize a committee to deliberate oversee delivery of the strategic plan
Strategic Planning Consultant timeline for planning process; recalibrate planning calendar	June 30, 2023	Establish a timeline for strategic planning process with consultant
ECC Staff/Board committee draft final purpose, mission and vision statements	Jul 15, 2023	Finalize purpose, mission and vision statements; approved by the board at June 2023 meeting
Strategic Planning data collection process complete*	September 1,2023	Summary of operating environment; establishing the critical need
Complete discussions about program strategies and key performance indicators*	October 30,2023	Draft Strategic Plan document for board and staff review
Budget rationalization; projections and fund development planning	November 30	Project costs to implement the plan
Board approves new strategic plan 2024-2027 (or 2029)	December 2023	Finalize strategic plan

* depends on alignment of calendars with the strategic planning consultant

Reference

Strategic Planning for Social Impact (Fulop, 2010)

<http://facilitationprocess.com/facilitating-strategic-planning-for-social-impact/6>