REQUEST FOR PROPOSALS (RFP): MEMPHIS CDC INDUSTRY REPORT

EXECUTIVE SUMMARY
Community L.I.F.T. Inc. (LIFT) is seeking to update the 2015 State of the CDC (Community Development Corporation) Industry report. The last report produced in 2015 established a base of evidence and suggested a new direction and strategic framework for LIFT and other local partners to develop a more unified and effective approach to strengthen CDC capacity throughout the city. To this end, LIFT is seeking the services of a consultant(s) experienced in community-based development and knowledgeable of the City of Memphis to conduct research on the state of the community development industry and to produce a report.

In the report, we aim to collect evidence that:
   a) Shows progress in the CDC industry because of increased investment by LIFT and others;
   b) Evaluates investments into CDCs (Has capacity-building resulted in the increase of CDCs or more CDC activity? Have CDCs been able to leverage additional funds using LIFT’s capacity building fund?);
   c) Identify specific CDC industry needs and make a stronger case for support to expand CDC investments in those areas; and
   d) Evaluates and projects the economic impact of projects either led or shepherded by CDCs.

The information collected and analyzed for this report will come from records of community development corporations and public sources and will include qualitative data not comparable across all organizations. Additionally, the selected researcher or team of researchers will collect anecdotal evidence of the industry’s impact through interview and other methods.

The report will serve as a call to action, providing a clear set of recommendations for improving the efficacy of service and organizational capacity of CDCs. These recommendations will apply to the organizations themselves, the philanthropic community, the business community, the public sector, neighborhood leaders, and LIFT.

Responses must be submitted by NOVEMBER 15, 2020 no later than 5:00 pm (Central Time)

{RFP ENCLOSED, LINKED OR ATTACHED}
Request for Proposal (RFP)
2020 State of the Community Development Industry Report
Memphis, Tennessee

Organizational Overview
Community LIFT’s mission is to accelerate the revitalization of disinvested neighborhoods to create a thriving Memphis for all. Community LIFT, also known as LIFT (Leveraging Investments For Transformation), emerged as the Greater Memphis Neighborhoods (GMN) plan’s driving organization and its top recommendation. Completed in 2009, GMN: A Blueprint for Revitalization plan is meant to accomplish several goals, namely to:

- Revitalize Distressed Neighborhoods
- Build the Human Capacity of those in Distressed Neighborhoods
- Improve Economic and Residential Vitality in Distressed Neighborhoods
- Improve Quality of Life of Citizens

LIFT officially launched in 2011 with founding supporters The Assisi Foundation, Community Foundation of Greater Memphis, National Bank of America Foundation, and City of Memphis Division of Housing & Community Development. To date, we have garnered over $14 million in national and local funding to benefit Memphis neighborhoods. LIFT operates a Community Development Financial Institution (CDFI), or non-traditional bank, River City Capital Investment Corporation (RCC).

We aim to fulfill our mission through a comprehensive approach that ultimately seeks to build capacity, empower stakeholders, and grow businesses in economically distressed communities.

We work to strengthen neighborhoods through investments in people, organizations, and businesses that labor tirelessly to improve community infrastructure and serve individuals politically, economically, or socially disadvantaged by promoting greater investment in and revitalization of marginalized communities.

Community LIFT has established excellence; maximizing resources; collaboration; equity and inclusion as its core values. The following beliefs guide our work:

- Memphis must link distressed neighborhoods to its broader framework for economic development, poverty alleviation, and improved public education, public safety, and public health.
- Memphis must increase the number of equitable, pro-neighborhood revitalization policies across institutions, particularly within local government and quasi-government entities and the philanthropic sector.
- Memphis must increase the allocation of resources for neighborhood revitalization, particularly for housing, economic development, and workforce development entities that target adults.
- Memphis must increase the number of high-capacity, place-based nonprofits, particularly among CDCs and within the economic, workforce development, and housing sectors.
Memphis must invest in its resident leaders to integrate community voices in the decision-making process and for lasting change.
Memphis must establish agreed-upon priorities and advance them through collaborative and cross-sectoral work.

Project Overview

Purpose
At this critical time in our fund’s history, we are seeking to update the 2015 State of the CDC Industry report. The last report produced in 2015 established a base of evidence and suggested a new direction and strategic framework for LIFT, BLDG Memphis, and other local partners to develop a more unified and effective approach to strengthen CDC capacity throughout the city. To this end, LIFT is seeking the services of a consultant(s) experienced in community-based development and knowledgeable of the City of Memphis to conduct research on the state of the community development industry and to produce a report.

The 2015 report helped to catalyze the need for the CDC Capacity Fund, one of LIFT’s three major programs and a mechanism by which we support neighborhood-based institutions. A key finding revealed the local CDC sector had been severely underfunded for years and operating with limited capacity, but with increased investment has the potential for significant growth. LIFT spent more than a year researching and working with an advisory committee comprised of community partners, local foundations, financial institutions, and CDCs to develop the fund’s policies/processes and to ensure its design could meet the broad needs of the industry.

Much has happened within the industry and across the city since 2015. LIFT launched the CDC Capacity Fund in 2017 and has since awarded close to $1.2 million in capacity-building grants for CDCs across 17 distressed neighborhoods. Our partners, BLDG Memphis, City of Memphis Division of Housing and Community Development (HCD), local foundations, and countless advocates, helped to secure the first Memphis Area Housing Trust Fund (MAHTF) in 2019. The fund was established by the City of Memphis government to address the affordable housing needs of households that earn up to 80 percent of the Area Median Income (AMI) - with the primary goals of increasing affordable housing, improving neighborhoods, and building nonprofit developer capacity.

Though some progress has been made in the last five years, critical challenges remain. The 2015 report concluded that “the sector as a whole remains under-funded and the resources that are provided are not being deployed in ways that would enable the industry to sustain itself or address strategic priorities”. A consistent challenge is lack of funding. While LIFT’s CDC Fund and other efforts to advocate for expanding community development investment have produced some wins, current progress does not match the vision articulated in the Greater Memphis Neighborhoods plan. Lastly, a broader civic understanding of the interconnections between worsening neighborhood blight and disinvestment and the overall health of the economy is still necessary to expand the level and scale of resources.

In the re-commissioned report, we aim to collect evidence that:
  a) Shows progress in the CDC industry because of increased investment by Community LIFT and others;
  b) Evaluates investments into CDCs (Has capacity-building resulted in the increase of CDCs or more CDC activity? Have CDCs been able to leverage additional funds using LIFT’s capacity building
c) Identify specific CDC industry needs and make a stronger case for support to expand CDC investments in those areas; and
d) Evaluates and projects the economic impact of CDC projects either led or shepherded by them.

The information collected and analyzed for this report will come from records of community development corporations and public sources and will include qualitative data not comparable across all organizations. Additionally, the selected researcher or team of researchers will collect anecdotal evidence of the industry’s impact.

The report will serve as a call to action, providing a clear set of recommendations for improving the efficacy of service and organizational capacity of our CDCs. These recommendations will apply to the organizations themselves, the philanthropic community, the business community, the public sector, neighborhood leaders, and to Community LIFT.

**Partners**

Community LIFT works with a vast selection of partners. The selected agency will work with our partner agencies as needed to coordinate information and gain a deeper understanding of our physical, social, and economic landscape.

BLDG Memphis, a direct service provider and partner, administers the Capacity Assessment Tool (CAT), developed the CAT analysis based on 2018 and 2019 CATs, provides technical services, and individualized capacity building for CDCs, and has helped to draft ongoing survey materials.

BLDG Memphis is a coalition for organizations and individuals who support the development and redevelopment of healthy, vibrant, attractive, and economically sustainable neighborhoods throughout the Memphis region.

Additional partners include:

**City Partners:**
City of Memphis Division of Housing and Community Development  
Shelby County Division of Planning and Development  
Economic Development Growth Engine (EDGE)

**County Partners:**
Shelby County Division of Community Services

**Local Foundations:**
The Community Foundation of Greater Memphis  
Hyde Family Foundation  
The Assisi Foundation of Memphis

**National Foundations:**
The Kresge Foundation  
JP Morgan Chase Foundation

**Local Community Development Ecosystem Partners:**
Objectives and Deliverables
The report shall include
- a data analysis of the industry over the past five years,
- a list of recommendations to fill the capacity gaps including broad guidance and specific policy needs,
- a data analysis of CDC economic impact (potential and actual), and
- a dollar amount required to create a plan of action to continue capacity building efforts

We anticipate this project will begin NOVEMBER, 2020. The final deliverable will be complete no later than MARCH, 2021. We must give final approval of the document prior to the completion date.

We seek the following information for inclusion into the State of the Industry Report*:

<table>
<thead>
<tr>
<th>From Community Development Organizations (CDCs)</th>
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<tbody>
<tr>
<td><strong>Organization</strong></td>
<td></td>
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<tr>
<td>- Name of the community development corporation</td>
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<tr>
<td>- Length of time under operation</td>
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<tr>
<td>- Neighborhood boundaries</td>
<td></td>
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<tr>
<td>- Staff size (FT and PT), titles/duties</td>
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<td>- Staff salary (a survey monkey with the email addresses from CDC)</td>
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<td>- Commercial/public office space</td>
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<td>- Educational attainment/degree of staff, experience</td>
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<tr>
<td>- Position-specific certification or training</td>
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<tr>
<td>- Staff Training (workshops, courses, conferences)</td>
<td></td>
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<tr>
<td>- Number of volunteers and volunteer hours</td>
<td></td>
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<tr>
<td>- Staff and/or volunteer satisfaction metrics</td>
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<tr>
<td>- Managed programs (outcomes, metrics)</td>
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<td></td>
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<tr>
<td>Partners (number and relationship)</td>
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<tr>
<td>Strategic planning/business plan documents</td>
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<td>Policy and larger community involvement</td>
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<tr>
<td>Diversity of staff</td>
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<tr>
<td>Funding of white-led CDCs versus black-led and/or minority-led CDCs</td>
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<tr>
<td>Board diversity</td>
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**Housing**
- Number of homes constructed, rehabilitated, sold, rented, or on the market
- Number of new homeowners
- Number in home counseling

**Business and Finance**
- Sources of income by funder (earned, foundation, city, state, federal, etc.) and percentage of revenue for each source
- Percentage of annual expense
budget covered by current funding
- Number of months of cash available at current spending rate
- Accounting/bookkeeping processes
- Contracts (partners and dollars)
- Major development projects (descriptions/funders/costs)
- Principal ways dollars are spent
- In-kind services

**Business/Org Systems**
- Communication tools and frequency
- Marketing/communications plan documents
- Resident/stakeholder surveys
- Percent of resident/stakeholder satisfaction
- Accounting/donor management/cloud back-up systems

**Community Engagement**
- Community facilities created/renovated
- Number of engaged community leaders and organizations
- Number of families supported
- Community programs
- Green/livability developments
- Neighborhood advocacy and engagement

**Economic Development**
- Commercial corridors improved
- Jobs created by each organization (beyond staff, e.g., contractors, interns)
- Assets (houses, grocery stores, farmer’s markets, commercial properties)
- Commercial developments/programs

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**From the Public Record and Partner Agencies**

**CDCs in Memphis**
- Total investment into CDCs (2015-2020)
- Anonymous funder interviews
- Review of 990s (2015 - 2020)
- Total staff, salaries, and wages
- Total volunteer hours and estimate of cost savings
- Review of 990s
- Public Policy
  - Tax law
  - Hindrances
  - Current Strategies

**Economic Impact**
- Contracts
- Workers’ wages
- Jobs created (contracts/programs/services)
- Increased spending in local economy
- Added to city tax rolls
- Increased wealth for property owners
- Change in foreclosure rate
- Additional investment attracted
  - Neighborhood investments over 5 years (2015 - 2020) (specifics/recipient/targets)
- Public Sector
- Private Sector
- Philanthropy
- Faith-Based organizations
- Other Partners
Qualitative and Anecdotal Information

Organizational Health

- Mission v goals v barriers
- Partnerships and collaborations
- Board viability and leadership
- Staff viability and leadership
- Neighborhood advocacy
- Funding sources and patterns (funder interviews)
- Recommend ways to improve/increase resources
- Policy goals and improvements

Services and Clients

- Perception of Impact
- Copy of latest evaluation
- Current services/programs target clients
- Future services/programs
- Resident stories and perceptions
- Business owner stories and perceptions
- Partner stories and perceptions

*Please note that this list is not comprehensive; the selected consultant may include additional information that it finds valuable to the overall key questions. We also reserve the right to include additional information if we deem it valuable for the purpose of this report.

Resources Provided to Consultant

1. We will provide a list of Community Development Agencies and their contact information, to be included in this report.
2. We will provide access to reports that have the latest information on our community development industry:
   a. The State of the CDC Industry, 2015
   b. The Greater Memphis Neighborhoods Plan
   c. BLDG Memphis CDC Capacity Analysis
3. We will provide a copy of the Shared Prosperity Report, 2019
4. We will provide support of an on-site team of partners – including two Community LIFT staff members and an intern. On-site support may include tasks such as securing meetings and making introductions.
5. Additional necessary resources may be discussed prior to awarding the contract.
6. We will determine the actual study area for the purposes of this report in partnership with the selected consultant. We will work to determine the focus of the report in partnership with the selected consultant.
7. We estimate that there are between 30 and 40 CDCs in the Memphis area.
Proposal Guidelines
Interested consultants and consulting teams should submit a proposal, not to exceed ten (10) typed pages in total (work sample not included in page count), including the following:

- General approach and specific proposed methodologies
- Proposed work plan and timeline for implementation
- Knowledge and experience of principal consultant(s)/team as outlined above
- Statement of current workload and demonstrated ability to meet schedules without compromising sound practice
- Total project cost
- 1-2 work samples

Selection Criteria
Selection will be based on the following criteria:

- Knowledge of and experience working with community-based organizations
- Proven experience in using quantitative and qualitative research methods
- Experience in community and economic development research
- Strong quantitative and qualitative data gathering and analytical skills
- Capacity to meet project timeline
- Strong writing skills

Responses must be sent by NOVEMBER 15, 2020 no later than 5:00 pm (Central Time) to:
Nefertiti Orrin
Community LIFT
119 Court Avenue, Suite 100
Memphis, Tennessee 38103
(901)521-4232 Ext. 227
nefertiti@communitylift.org

Responses will be accepted by either mail or email. LIFT may, at our own discretion, extend this closing date for the submission of proposals by notifying all bidders in writing. Any proposal received by LIFT after the closing date for submission of proposals may be rejected.