

Request for Proposal: Strategic Plan Facilitation

Due: April 9, 2021

I. Introduction and Background

Housing Opportunities and Maintenance for the Elderly (H.O.M.E.) is in the last year of its current five-year strategic plan. We are seeking to develop the next 3-5 year plan during the remainder of H.O.M.E.'s fiscal year, which ends September 30, 2021. Our goal is to create a roadmap for the next stage of our organization's journey.

We are looking for a consultant who will help us design and facilitate a participatory planning process that will create the next strategic plan for the organization.

A. Organization Overview

H.O.M.E. is a one-of-a-kind Chicago organization that fosters joy, independence, and connection for older adults with low incomes. H.O.M.E. is the only nonprofit organization in the City of Chicago that provides housing support services to low-income seniors in its underserved neighborhoods. Since 1982, H.O.M.E. has acted as a social safety net, helping over 550 low-income Chicago seniors annually to thrive in their community through the following programs:

- **Intergenerational Housing:** H.O.M.E.'s innovative intergenerational housing model is based on the value that people of all ages benefit from connecting with one another. Rather than the typical standard of senior-only buildings, senior residents share the same roof as young adults that serve as Resident Assistants and families with children. H.O.M.E. offers 78 units of multigenerational independent housing in three affordable north side buildings with a choice of private or shared living.
- **Community Programs:** H.O.M.E. helps low-income seniors maintain their independence and live socially engaged lives through a home upkeep and repair service serving primarily south and west side residents, a shopping bus, and moving assistance. H.O.M.E. also connects volunteers to homeowners with painting or weatherization needs, or to help in its buildings as a friendly visitors or guest chef.

H.O.M.E.'s Values

H.O.M.E. centers its housing and services around each senior and helps them stay connected to their communities. H.O.M.E.'s philosophy is encapsulated in the words of its co-founder, Lilo Salmon: *"Life encompasses all age groups. It doesn't segregate. I don't think we should either."*

- **Dignity** – We believe everyone deserves to be treated with great respect, compassion and acceptance.

- **Community** – We are united in our commitment to low-income seniors, and we inspire others to join us in our mission.
- **Independence** – We believe that maintaining their independence and being part of a community is essential for seniors to enjoy health and well-being.
- **Trust** – We build and maintain trust with each other, the people we serve, neighbors, and supporters.
- **Teamwork** – Fueled by enthusiasm for our mission, we depend upon each other for collaboration, support and appreciation.
- **Service to older adults** – We strive to provide outstanding person-centered service through unique programs that support the growth of Chicago’s low-income seniors while addressing their housing challenges.

Strategic Plan

H.O.M.E.’s Strategic Plan for Fiscal Years 2017-2022 is summarized below:

1. H.O.M.E. is **recognized nationally as a model** for fostering joy, connection, and independence for low-income seniors.
2. H.O.M.E. has identified specific opportunities to **expand its housing on the South or West side** of Chicago.
3. H.O.M.E. **leaders embody our values**, preserve our culture, and demonstrate vision to lead into the future.
4. H.O.M.E. **Board of Directors** has the breadth and depth of connections necessary to achieve our vision and strategic goals and will engage them on behalf of H.O.M.E.
5. H.O.M.E. has the **sustainable philanthropic support** necessary to expand its services.

As an established organization with a solid, committed Board of Directors and staff, H.O.M.E. is in a position to be a national “go-to” leader of a housing and community development movement that recasts older adults from people with needs, to people with gifts who can and should remain contributing community members.

Over 102,000 senior households in Chicago subsist on \$30,000 or less per year. Nearly 4 of 5 older Chicagoans who rent and more than 1 in 3 homeowners can barely afford food, medicine and other necessities. Displacement is a daily fear. If the older adult is a woman of color, she is even more likely to live alone, in poverty, and burdened by housing and health care costs. This describes the population H.O.M.E. serves: 74 percent identify as female and 68 percent identify as African American. Most live on the \$771 they receive from Social Security with no other financial or family support.

H.O.M.E.’s effort to help end racial inequity and social isolation is to promote and support age-inclusive and interracial housing development. Rather than pigeonhole older adults in “senior

housing,” H.O.M.E. works collaboratively to create intergenerational housing that brings young and old together in community. H.O.M.E.’s “Good Life Senior Residences” model is family-style housing – that is, shared meals, common areas, and activities – for seniors, young adults serving as Resident Assistants and families with young children. Most of H.O.M.E.’s residents are “elder orphans” and seek opportunities to socialize. Otherwise, they are at risk of being prematurely housed in nursing homes or otherwise isolated in substandard housing.

The flip side is that families with children and younger adults also benefit from living with elders. Most Resident Assistants are young adults, often LGBTQ, who are students or who may have experienced homelessness and food insecurity. Living and working as an RA provides community and stability.

H.O.M.E.’s Community Programs – Upkeep and Repair, Moving, and the Shopping Bus – are likewise cast as senior-centered, responding to the senior where they are at by providing in home repair services; communal transportation to grocery or drug stores; and helping them move from one home to another. H.O.M.E. prides itself on having staff whom seniors recognize as trustworthy, patient, reliable, and accessible; H.O.M.E.’s services are offered with little red tape and virtually no cost.

Challenge

Low-income seniors, and Black and brown people of all ages have been disproportionately affected by COVID and by the economic downturn. H.O.M.E. has always been aware that this inequity existed before COVID, but it remains a fact that the capacities as well as needs of urban, low-income seniors remain on the sidelines of society’s attention. As Baby Boomers age, services that allow aging in community -- H.O.M.E.’s expertise -- will be more in demand than ever. H.O.M.E. has achieved many of the strategic goals outlined in the current strategic plan, positioning the organization for growth. However, with emerging trends, H.O.M.E. needs to identify new goals to further support our mission, and address the long term impact COVID and racial inequity have had in our community.

II. Scope of Project

H.O.M.E. is seeking a talented facilitator to lead the board and staff over a defined number of sessions to (1) align H.O.M.E.’s plan with diversity, equity, and inclusion goals internally and in program design and delivery; and (2) identify new and differentiating strategic goals that will advance H.O.M.E.’s position in a 3-5 year time horizon.

Deliverables

While we are looking for a perspective on how to design and facilitate the strategic planning process, we assume at a minimum, the below deliverables would be included as part of the work:

- Session agenda(s) supported by virtual facilitation tools
- Meeting summaries
- Strategic Goals and system for measuring progress and accountability

III. **Proposal Requirements**

- A. **Project Approach:** Include a complete description of the proposed approach for the project as well as a description of the process and deliverables. This section should clearly convey your understanding of the needs outlined in this RFP.
- B. **Work Plan:** Specify the steps and timeline for completing the proposed sessions and deliverables. This section must contain sufficient detail to convey the firm's knowledge of the subjects and skills necessary to successfully complete the project.
- C. **Qualifications:** Provide a description of the specific skills related to this project, including a discussion of 1-2 similar projects undertaken.

IV. **Selection Criteria**

- Demonstrated subject matter knowledge and expertise – the extent to which the individual demonstrates skills and abilities in the areas of: experience working with organizations that do community organizing and advocacy; an understanding of how to integrate racial equity issues into a strategic planning process; and development of strategic planning working sessions.
- Experience designing and facilitating a strategic planning process.
- Recent experience as a consultant in the desired area of expertise.
- Rate reasonableness – the extent to which rates are considered reasonable compared to the individual's experience and qualifications and to market prices.
- Experience working with organizations that do community organizing and advocacy,

Due Date: April 9, 2021

Proposals should be submitted electronically to: Gail Schechter, Executive Director, GailS@HOMEseniors.org. If you have any questions, feel free to contact Gail Schechter via email or at (773) 295-2711.