
FINANCIAL SECURITY CLT REQUEST FOR PROPOSAL

June 2020

COALITION DESCRIPTION AND HISTORY

Financial Security CLT is a coalition of Mecklenburg County nonprofit organizations who share a belief that financial security is the underpinning of economic mobility. These organizations have made a commitment to work collaboratively to help families get on, and stay on, a path to greater financial security through empowerment and asset building.

The coalition's purpose is to connect local nonprofit leaders seeking to create improved financial security for constituents in order to share strategies, identify gaps, find points of intersection, and leverage local, statewide, and national best practices. The ability to weather financial emergencies, share equitably in economic opportunity, and plan for a brighter future is a vision shared by all coalition partners through their differing individual missions.

The founding organizations are:

[Care Ring](#)

[Charlotte Center for Legal Advocacy](#)

[Communities in Schools Charlotte-Mecklenburg](#)

[Community Link](#)

[Council for Children's Rights](#)

[Crisis Assistance Ministry](#)

[Goodwill Industries of the Southern Piedmont](#)

[GreenLight Fund](#)

[La Coalición | Latin American Coalition](#)

[Leading on Opportunity](#)

[The YMCA of Greater Charlotte](#)

[Urban League of Central Carolinas, Inc.](#)

These organizations came together organically in the fall of 2018 after attending Prosperity Now's conference and realizing that their individual agency missions could not be fulfilled without an overarching strategy for collective impact.

Since then, the coalition has hosted three community events: a meeting of the NC Assets Alliance that featured a panel discussion focused on Engaging and Empowering Unheard Voices in Economic Mobility, a poverty simulation with board members of more than 10 local agencies, and a community luncheon featuring two prominent authors discussing Race, Wealth, and Inequality.

In February, Wells Fargo announced a generous grant of \$250,000 to support the work of the coalition.

THE NEED

With the extreme change in economic circumstances due to the COVID-19 pandemic, Financial Security CLT decided to bring in a consultant to help map the path forward. The group has proven its ability to collaborate and is eager to advance its ambitious vision without losing momentum or reinventing the wheel.

Ideally, the selected consultant will have a broad and deep understanding of social sector issues in Charlotte including experience with nonprofits, grassroots organizations, and neighborhood-based initiatives. He/she/they will be able to research and analyze existing models of collaborative systems and will share the coalition's commitment to placing the voices of low and moderate-income families at the center. The candidate will also have experience in and be skilled at applying a racial equity lens to all aspects of the project.

PROJECT OVERVIEW

Work for this project falls into two focus areas:

1. Organizational Structure
2. Shared Policy Agenda

HIGH-LEVEL DELIVERABLES

A successful project must include the following:

- Thorough review of the coalition's vision, mission, and membership structure with recommendations for improvement.
- Detailed plan for organizational structure including governance and sustainability.
- Shared policy agenda roadmap outlining key advocacy opportunities at the systemic level which amplify individual agencies' programs and missions and concrete actions that the coalition can take.
- Communications templates/materials to support advocacy action plan.

HIGH-LEVEL TIMELINE/SCHEDULE

It is expected that the work will be completed roughly as follows:



PROPOSAL FORMAT

Formal proposals should include:

- A cover letter highlighting:
 - Your approach to strategic planning
 - A summary of your experience consulting with nonprofits
- Resume
- Three client references
- Sample work plan project
- Timeline with major tasks and milestones
- Itemized budget
- Identification of anyone else on your team who will be involved with the project, including name, role, and experience

06/02/2020

PROPOSAL SELECTION CRITERIA

Key qualifications that will be considered:

- Experience in successfully developing strategic plans
- Depth and breadth of familiarity with the nonprofit landscape in Charlotte
- Knowledge of collective impact and collaborative strategic initiatives
- Experience researching and analyzing existing systems
- Ability to analyze systems and processes for racial impact
- Strong facilitation skills
- Project management experience
- Education (degrees and/or certificates)

PROPOSAL SUBMISSION AND TIMELINE FOR SELECTING CONSULTANT

Question period: Submit questions via email at advocacy@crisisassistance.org **between Monday, July 6 and Friday, July 17, 2020.**

Proposal submission deadline: **Friday, July 31, 2020 at 5:00 p.m.**

Consultant Selection Announcement: Mid-August