

# 2016 Request for Proposal – LGBT Community Needs Assessment

It has been over 20 years since a comprehensive needs assessment of the San Francisco Bay Area’s large and diverse LGBT community has been performed. Horizons Foundation, which serves the nine counties of the Bay Area, seeks to contract with a firm to carry out such an assessment.

The findings from the needs assessment will be employed by the foundation itself in setting priorities for grants and program initiatives. The results will also be disseminated to other stakeholders and partners for their use to inform their activities. This will include LGBT organizations and organizations serving the LGBT community, Horizons’ donors and other donors giving to the LGBT community, foundation partners, and local and state governments.

1.0 **Schedule.** The following is the estimated schedule.

RFP Release	Wednesday, April 20, 2016
Information Conference Call (712) 432-1500 code: 637429#	Wednesday April 27, 2016, At 11 AM PT
Deadline for Proposer Questions Email questions to <a href="mailto:fbuchting@horizonsfoundation.org">fbuchting@horizonsfoundation.org</a>	Wednesday, April 27, 2016 by 1 PM PT
Deadline for Horizons Answers	Friday, April 29, 2016 by 5:00 PM PT
Written Proposals Due to Horizons by Email to <a href="mailto:fbuchting@horizonsfoundation.org">fbuchting@horizonsfoundation.org</a>	Monday, May 16, 2016 by 1:00 PM PT See RFP Section 11 for Email Delivery Instructions
Anticipated Funding Decision Announcement Date	Thursday, June 8, 2016

2.0 **Horizons Contact:** Francisco O. Buchting, Vice President of Grants, Programs, and Strategic Initiatives  
[fbuchting@horizonsfoundation.org](mailto:fbuchting@horizonsfoundation.org)  
415.398.2333

3.0 **Purpose.** The purpose of this RFP is to enter into a firm fixed price agreement in the range of \$90,000 to \$110,000 with a qualified Consultant to conduct a nine-county San Francisco Bay Area LGBT community needs assessment. The nine San Francisco Bay Area counties Horizons serves are Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. The services will include taking the lead in the areas of methodology, survey development and mixed methods data collection, data analysis, and production of a final report. The Consultant and Horizons staff will work collaboratively throughout the process.

Findings from the community needs assessment will be used by 1) Horizons Foundation in setting its funding priorities, 2) LGBT organizations and organizations serving the LGBT community, 3) Horizons donors and other donors in informing their philanthropic giving to the LGBT community, 4) other foundation partners, 5) and local and state government in allocating resources.

4.0 **Period of Performance.** It is estimated that Services will commence on May 16, 2016. Substantial completion must occur by January 16, 2017. Full completion must occur by March 1, 2017.

5.0 **Background.** Horizons Foundation is the world's first community foundation based in and serving the LGBT community. Horizons serves the entire breadth of the community, supporting scores of advocacy, services, and arts organizations. Throughout our 36-year history, Horizons has strongly emphasized supporting nonprofits that advocate for and serve marginalized and/or disadvantaged parts of our community, including LGBT people of color, transgender people, LGBT people with low incomes, and women. In the same spirit of commitment, the foundation has long looked to fund LGBT organizations, causes, and communities that have relatively little chance of finding financial support from other, more mainstream sources. Horizons is in the midst of an ambitious multi-year growth plan and this Needs Assessment project is integral to the foundation's future work.

6.0 **Minimum Qualifications.** A Proposer must meet or exceed the following minimum qualifications:

- The Proposer has significant relevant experience in assessing community needs, five years or more preferred
- The Proposer has a track record of reaching, working with, and gaining the trust of underserved and marginalized communities
- The Proposer is familiar with issues affecting the LGBT community

7.0 **Statement of Services and Deliverables.** The Consultant shall perform the following services and provide the associated deliverables at a firm fixed price.

7.1 **Develop an LGBT Community Needs Assessment Plan.** The Consultant shall use best and promising needs assessment practices to outline and detail the approach for conducting the community needs assessment. In consultation with Horizons staff, the Consultant shall

develop a community needs assessment plan, identify key tasks and timelines, and propose a sound methodology to conduct the community needs assessment. The Consultant shall hold one meeting with the Horizons Needs Assessment Committee to gather input and feedback on the proposed plan.

This deliverable will be considered complete upon Horizons' acceptance of the final community needs assessment plan.

- 7.2 **Compile and Review Secondary Data.** The Consultant, in collaboration with Horizons, will work with LGBT organizations and private and public entities serving the LGBT community to obtain and synthesize available secondary data that already exist about LGBT community needs in the nine counties of the San Francisco Bay Area. Horizons will help Consultant identify such entities, and assist in negotiating information sharing and collaboration by these organizations. The Consultant will also review and reference relevant national level studies and data and gather relevant information from government and other entities (foundations, universities) that may have information about the LGBT community. The information collected will not only inform the data to be collected as part of the needs assessment, but will also be summarized and included in the Final Report.

This deliverable will be considered complete upon Horizons' acceptance of the Final Report.

- 7.3 **Develop Community Needs Assessment instrument(s).** The Consultant shall develop the instrument(s) to be used to collect data. Data collection targets may include relevant organizations and/or community members. This may entail a mixed methods approach of surveys (online, telephone, or in-person), key informant interviews and/or focus groups, and other proposed data collection methods and approaches. The Consultant will consult with Horizons in the development of the instrument and approach.

This deliverable will be considered complete upon Horizons' acceptance of the final data collection instruments and methods.

- 7.4 **Conduct Community Needs Assessment.** The Consultant shall conduct needs assessment in accordance with Horizons' approved plan (see 7.1) using the approved instrument(s) (see 7.3).

This deliverable will be considered complete upon completion of the data collection and data analysis.

- 7.5 **Prepare Final Report.** The Consultant shall prepare a draft needs assessment report that includes an executive summary, introduction and background, methods (data collection, strengths and limitations, and key participants), key findings, recommendations, appendices (e.g., data collection instruments, schedule of activities). The Consultant shall consult with Horizons to gather the pertinent background data (see 7.2). The final report shall incorporate all relevant findings from both Horizons and Consultant-led activities.

This deliverable will be considered complete upon Horizons' acceptance of the final report.

- 7.6 **Additional Services:** Horizons may request the Consultant to provide additional services beyond those described in Sections 7.1 through 7.5. These services will be performed at the Consultant's hourly rate or flat fee and may result in an extension of the term of the agreement.
- 8.0 **Project Approach.** The successful Applicant shall designate a key person to serve in the role of Project Manager.
- 9.0 **Contract Modifications.** Any questions about Horizons' contract should be made prior to the "Agreement Execution by Consultant" period. The Applicant must provide a revised version that shows its proposed alternative contract language. Horizons is not obligated to accept any modifications proposed by the Applicant.
- 10.0 **Solicitation Instructions, Procedures and Requirements.**
- 10.1 **Questions.** Applicants may submit written questions to Horizons until the deadline stated in Section 1.0. Horizons prefers questions submitted through e-mail. Failure to request clarification of any inadequacy, omission, or conflict will not relieve the Consultant of responsibilities under in any subsequent contract. It is the responsibility of the interested Applicant to assure it receives responses to questions if any are issued.
- 10.2 **Cost of Preparing Proposals.** Horizons will not be liable for any costs incurred by the Proposer to prepare, submit and present proposals, interviews and/or demonstrations.
- 10.3 **Changes or Corrections to Proposal Submittal.** Prior to the submittal closing date and time, a Consultant may change its proposal, if initialed and dated by the Consultant. No changes are allowed after the closing date and time.
- 10.4 **Incorporation of RFP and Proposal in Contract.** This RFP and the Proposer's response, including all promises, warranties, commitments, and representations made in the successful proposal as accepted by Horizons, shall be binding and incorporated by reference in Horizons' contract with the Proposer.
- 10.5 **Independent Contractor.** The Consultant works as an independent contractor. Horizons will provide appropriate contract management, but that does not constitute a supervisory relationship to the Consultant.
- 11.0 **Proposal Submittal**
- 11.1 **Email Submittal:** The Proposer must email its proposal in .pdf format to the Vice President of Grants, Programs, and Strategic Initiatives. It is preferable that the entire proposal document be in one PDF document.

Any work sample should be submitted electronically as separate attachments with the proposal email (if a non-electronic work sample needs to be submitted, please email Francisco Buchting for submission instructions).

Written proposals due to Horizons by email to <a href="mailto:fbuchting@horizonsfoundation.org">fbuchting@horizonsfoundation.org</a>	Monday, May 16, 2016 by 1:00 PM PT
--	---------------------------------------

**11.2 Format and Organization:** The Proposer is requested to complete and submit the following documents in its proposal:

- 1) Cover Letter: Submit a cover letter on the Proposer's letterhead, signed by an individual authorized to legally commit the Proposer. List any addenda, such as work samples, being submitted as part of the proposal.
- 2) Horizons' application comprised of sections 1 through 7 found after section 12.2.2 of this RFP
- 3) Proposal Narrative: adherence to the following formatting requirement is necessary:
  - One inch margin on four sides
  - 12 pt. font
  - Times New Roman or other standard font
  - Narrative cannot be longer than six pages (this excludes required timetable)(shorter narratives are welcome)

## **12.0 Selection and Award**

**12.1 Selection Process: Step 1 - Initial Screening:** Horizons will review submittals for initial decisions on responsiveness and responsibility. Those proposals found to be responsive based on this initial review shall proceed to Step 2.

Step 2 - Proposal Evaluation: Horizons' Needs Assessment Committee will review responses to the Minimum Qualifications. Those proposals found to meet the minimum qualifications will be fully evaluated based on the materials submitted by the Proposer.

Step 3 - References: Horizons may contact one or more references that have been provided by the Proposer or other sources that may not have been named by the Proposer but can assist Horizons in determining qualifications.

Step 4 - Contract Negotiations: Horizons may negotiate elements of the proposal to best meet the needs of Horizons with the apparent successful Proposer. Horizons may negotiate any aspect of the proposal or the solicitation.

**12.2 Award and Contract Execution:** Notice to all Proposers: The Vice President of Grants, Programs and Strategic Initiatives will provide timely award decision notice to all Consultants responding to the Solicitation.