

August 20, 2025

Request for Proposals

Facilitation Partner for the EBCF Impact Planning Process

1. Overview

The East Bay Community Foundation (EBCF) seeks a facilitation partner to lead a six-month Impact Planning Process from November 2025 to May 2026. The process aims to align EBCF's strategic direction, culture, and operations with its North Star: *"An East Bay where everyone has the economic freedom to dream, heal, and belong."*

This process is designed to **align EBCF's strategic direction, culture, and operations** with our North Star. It is not a transformational reset, but rather a structured opportunity to deepen alignment, strengthen practices, and clarify priorities across the organization.

Community voice will be central in shaping the outcomes of this process, ensuring that the lived experiences of residents, CBO leaders, and partners guide the priorities and commitments that emerge.

EBCF's internal planning is shaped by principles of adaptive leadership, Results Count, and iterative learning.

2. Project Scope & Stakeholders

The selected facilitator will design and implement a community engagement plan, facilitate internal strategy and alignment meetings, and draft the final EBCF Impact Plan.

Note: The **scale of engagement will be determined collaboratively** between EBCF, the facilitation partner, and key stakeholders to ensure the process is both meaningful and achievable within the project scope and budget.

Key Stakeholders include:

- Residents from Alameda and Contra Costa counties, particularly from the most underfunded and marginalized cities.
- Community-Based Organization (CBO) leaders and staff.
- Populations served by grantees.
- Donors.
- Public sector partners.
- Board of Directors.
- EBCF Staff.

3. Key Deliverables

- Community Engagement Summary Report that elevates community perspectives and ensures they are central to shaping outcomes.
- Impact Planning Outputs (priorities, roles, metrics) that reflect the voices of community stakeholders and reinforce EBCF's existing direction.
- Final Impact Plan (draft and final versions) that serves as an internal roadmap and external statement of alignment with EBCF's North Star, grounded in community voice.
- Design and Facilitation of a Staff Retreat (**anticipated as a 1-day session**) focused on deepening alignment and connection across staff, informed by community insights.
- One presentation to staff and one presentation to the Board of Directors that highlights how community voice shaped the outcomes.

4. Timeline

- Release Date: August 19, 2025
- Letter of Intent Due: September 5, 2025
- Q&A (Questions & Answers) Due: September 12, 2025
- Full Proposal Due: September 26, 2025
- Finalist Interviews (by invitation): October 13 – October 23, 2025
- Selection & Contracting: October 28, 2025
- Project Start: November 5, 2025
- Project Completion: May 6, 2026

5. Budget

The total budget for this project should not exceed \$150,000. Proposals must include a detailed budget and billing terms, no longer than 1–2 pages. The budget should clearly outline all costs associated with the project, including labor, materials, and other expenses.

6. Letter of Intent (LOI) Guidelines

Applicants must submit a Letter of Intent in order to be eligible to submit a full proposal.

LOI Requirements:

- **Length:** 1–2 pages
- **Format:** PDF, Arial 11 pt+, 1.5 spacing, 1-inch margins
- **Content:**
 - Applicant name, organization, and contact information
 - Brief description of facilitation experience and relevant qualifications
 - Statement of alignment with EBCF's mission and equity-centered approach
 - Confirmation of intent to submit a full proposal

Submission Instructions:

- LOIs must be submitted by **September 5, 2025** to: rfp@eastbaycf.org
- Any applicant submitting an LOI will:
 - Be eligible to submit a full proposal
 - Receive the compiled Q&A responses

7. Proposal Requirements & Format

All proposals must be submitted as a single PDF file with the following formatting guidelines:

- **Font and Spacing:** Arial, minimum 11 pt, 1.5 line spacing.
- **Page Limits:** Proposal body not to exceed 10 pages (excluding cover page, TOC, and appendices).
- **Margins:** 1-inch on all sides.
- **Cover Page:** Must include project title, applicant's name, and contact information.

Required Sections:

- **Letter of Interest (1–2 pages):** Demonstrating alignment with EBCF's mission.
- **Proposed Approach (4–5 pages):** Detailed facilitation and engagement methodology.
- **Project Timeline & Staffing Plan (1–2 pages):** Clear timeline and team overview.
- **Budget & Billing Terms (1–2 pages):** Detailed costs with billing terms.
- **Work Samples & References (Appendices):** Past facilitation/strategy work, one writing sample from a strategy/impact document, and two professional references. (Not counted toward page limit.)

8. Questions & Answers

Questions regarding this RFP must be submitted via email to rfp@eastbaycf.org no later than 5:00 PM (PT) on September 12, 2025.

- No individual responses will be provided directly to applicants.
- Q&A will be distributed only to applicants who submitted a Letter of Intent.

9. Evaluation Criteria & Scoring Rubric

Proposals will be evaluated by a review committee composed of **EBCF staff**. The committee will assess each proposal using the following criteria:

- Relevant facilitation experience: 20 points
- Equity-centered approach and methodology: 20 points
- Community and cultural fluency: 15 points
- Writing and synthesis capabilities: 15 points
- Team qualifications and capacity: 10 points
- Proposal clarity and professionalism: 10 points
- Cost and value alignment: 10 points
- **Total: 100 points**

Following the review of written proposals, **selected finalists will be invited for interviews** with the review committee before a final selection is made.

10. Submission Instructions

Step 1: Submit Letter of Intent

- Due September 5, 2025
- Email to rfp@eastbaycf.org

Step 2: Submit Full Proposal

- Due September 26, 2025
- Email to rfp@eastbaycf.org

Late or incomplete submissions may not be reviewed.