

**Department of Neighborhoods**  
**REQUEST FOR PROPOSALS** RFP #DON\_2022\_01

**Consultant Contract**

**Project Title: BIPOC Generational Wealth Strategies**  
**Research & Analysis**

**Applications Due: Thursday, March 10, 2022 at 5:00pm**  
Applicants should submit proposals electronically to the Dept of Neighborhoods at  
Jackie.Mena@seattle.gov using the subject line  
“BIPOC Generational Wealth Strategies Research & Analysis RFP”

**Estimated Procurement Schedule\***

Feb 17 2022	RFP is posted
Feb 17-Mar 4 2022	Open period for questions from potential applicants. Questions and their answers will be posted on the City of Seattle Consultant Connection web site <a href="https://consultants.seattle.gov/">https://consultants.seattle.gov/</a>
Mar 10 2022	Applications must be received or postmarked by March 10 at 5:00 pm. Applicants should submit proposals electronically to Department of Neighborhoods at Jackie.Mena@seattle.gov using the subject line “BIPOC Generational Wealth Strategies Research & Analysis RFP.”
Mar 24 2022	Anticipated selection of finalists for interview.
Mar 29 2022	Anticipated interviews of finalists.
Mar 30 2022	Anticipated award announcement.
April 15 2022	Anticipated date of contract execution.

*\*The City reserves the right to modify this schedule*

**Procurement Contact Information**

Primary: Jackie Mena; [Jackie.Mena@seattle.gov](mailto:Jackie.Mena@seattle.gov)

Other Contact: Melia Brooks; [Melia.Brooks@seattle.gov](mailto:Melia.Brooks@seattle.gov)

Jenn Brandon: [Jenn.Brandon@seattle.gov](mailto:Jenn.Brandon@seattle.gov)

## **Purpose**

The City of Seattle is seeking a qualified consultant or consultant team to provide research, analysis, and expertise in support of developing coordinated municipal strategies that address intergenerational wealth gaps and historic underinvestment in Black, Indigenous, People of Color (BIPOC) communities. The Consultant will have demonstrated knowledge, expertise, and relationships in this and related topics including community wealth-building and inclusive, equitable economies.

This work will be managed by the Department of Neighborhoods and will serve the City's Interdepartmental Team (IDT) on Generational Wealth, which is in its foundational phase. The role of the Consultant will be to conduct research, analysis, and distillation of the most effective intergenerational wealth-building strategies employed in cities across the nation and producing a report and presentation of findings and recommendations to guide the IDT's work.

The contract period is estimated to run 6-9 months, with a projected start date of April 2022.

## **Background:**

Beginning in late 2020, the Mayor's Equitable Communities Initiative (ECI) Taskforce underwent a nine-month process to recommend how the City should allocate \$30M for investment in Seattle's Black, Indigenous, and People of Color (BIPOC) communities. Comprised of 24 BIPOC community leaders who spanned sectors of community development, housing, higher education, healthcare, arts and culture, and economic development, the ECI Task Force convened weekly to develop its budget recommendations, which were presented and adopted by both the Mayor and the City Council in November 2021.

The ECI's recommendations included budget allocations to several City departments to develop or expand the City's "Generational Wealth" initiatives aimed at addressing race-based wealth gaps. Specifically, the Department of Neighborhoods was directed to advance the following two ECI recommendations:

- Develop a generational wealth education program to help BIPOC residents, artists and business owners navigate and plan for financial topics, including homeownership, property taxes, small business development, real estate development, retirement planning, and asset management.
- Integrate city resources and services so that community members who contact the city receive more holistic guidance and information about implementation would involve creation of a one-stop location for education, information, and support on these financial issues.

As part of the budget allocation, the City Council's Community Economic Development Committee issued a Statement of Legislative Intent (SLI) to the Department of Neighborhoods requesting a report on community wealth building and equitable economy strategies to reduce

the racial wealth gap. The work performed under this BIPOC Generational Wealth Research and Analysis contract will contribute to the contents of that report.

This RFP is the first of several that DON will issue to address the ECI and City Council priorities named above, and to build a baseline infrastructure for City departments to collaborate, learn, coordinate, and invest in innovative and community-centered approaches to closing race-based wealth gaps.

## **Scope of Work and Deliverables:**

### **Scope of Work:**

- Work with DON and the City's Generational Wealth IDT to identify focus areas for research and analysis of wealth-building strategies that have been used in other municipalities to close racialized wealth gaps AND local histories that can bring understanding to how racialized wealth gaps have impacted our City's development.
- Use a racial equity framework to conduct research and analysis of wealth building strategies, centering the experiences of BIPOC communities and assessing benefits and burdens to communities of color.
- Outline the barriers and opportunities particular to the Seattle Metropolitan Area that inform and could impact Seattle's approach to (and success in) building intergenerational and community wealth.
- To the degree possible by the available research, incorporate findings on the efficacy of particular wealth building strategies for specific demographic groups, recognizing the diversity within and among BIPOC-identifying communities.

### **Deliverables:**

- Participation in 4-8 IDT and/or Community Roundtable meetings to develop understanding of stakeholder interests and focus areas
- 2-4 presentations of findings to stakeholders as needed (IDT, Roundtable, etc.)
- Report outline, draft report, and final report that includes:
  - A survey of municipal strategies and models that have been successful in building wealth for BIPOC communities within the focus areas outlined for this process. Strategies should include timelines, cost, evidence-based impacts, and other key considerations.
  - Specific recommendations for key programs and/or policies that would align with the ECI and City of Seattle's goal of building generational wealth for BIPOC communities
  - Recommendations on specific state/county/city policies that should be revised to better facilitate building BIPOC generational wealth in Seattle
- Adapted version of the report that specifically responds to Council Member Morales' [Statement of Legislative Intent \(SLI\)](#).

## Estimated Performance Schedule

The consultant must be available to commence work on this project no later than mid-April 2022. The timeline of the contract is estimated to run for 6-9 months.

The scope of work and deliverables schedule begin when the contract is executed by all parties and ends when this portion of the project is completed, unless amended by written agreement or terminated earlier under termination provisions. Our estimated schedule is as follows:

Tasks	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
RFP released & selection	■	■							
Project Start-up			■						
Check-ins with DON staff			■	■	■	■	■	■	■
As-needed briefings with stakeholders			■	■	■	■	■	■	■
Consultant's research & analysis			■	■	■				
Submit draft report and response to SLI; present to IDT						■			
Submit final response to SLI; present to IDT						■	■		
Submit final comprehensive report; present to IDT							■	■	

## Contract Budget

The budget for this contract is \$60,000.

## Minimum Qualifications

The following minimum qualifications are required:

- **Project Management:** The consultant must demonstrate that they can manage a project and interact with multiple collaborators, including other consultants who will work on parallel and complementary deliverables (e.g., Inventory of current City Generational Wealth programs, Community Assessment of current programs.)
- **Racial Equity Analysis:** The consultant must demonstrate their experience and commitment to centering the voices and needs of those most affected by the impacts of racial inequities.
- **Program and Policy Analysis:** The consultant must demonstrate their experience researching and analyzing the impact of programs and policies focused on economic and/or community development, race-based income disparities, community-wealth-building, and/or related issues.
- **Communications:** The consultant must demonstrate that they have experience producing materials, including formal reports and presentations, which are accessible and clearly explain complex concepts to diverse audiences through written and graphic communications.

## **Proposal Content Requirements**

Prepare your response as follows. Use the following format and provide all attachments. Please note that incomplete applications will not be considered. Please do not include brochures or letters of support.

1. Please complete the Cover Page (Attachment A).
2. Please complete the Application Questions (Attachment B). Limit this section to 5 pages and use 12-point font for legibility.
3. Please complete the Reference Sheet (Attachment C). We are asking you to provide the names and contact information for at least 2 references.
4. Please complete and submit the consultant questionnaire found at the following link:  
<http://www.seattle.gov/Documents/Departments/FAS/PurchasingAndContracting/Consulting/fas-cpcs-consultant-questionnaire.docx>

## **Deadline & Terms for Submission**

The RFP closes Thursday, March 10, 2022, at 5:00pm. Applicants should submit proposals electronically to the Dept of Neighborhoods using the following email address: Jackie.Mena@seattle.gov and putting in the subject line “BIPOC Generational Wealth Strategies Research & Analysis RFP”

**BIPOC Generational Wealth Strategies  
Research & Analysis**

**Attachment A: Application Cover Page**

Organization	
Legal Business Name of Consultant or Consulting Firm	
Name of Lead Contact	
Phone	
Email	
Website URL, if available	
UBI #	
City of Seattle Business License #	
<b>Are you able to begin work in April 2022?</b>	

# BIPOC Generational Wealth Strategies

## Research & Analysis

### Attachment B: Application Narrative

Please address the following topics in your application. Limit your application to 5 pages using 12-point font. Attachments and exhibits, if included, are not counted toward the limit.)

- Approach and Methodologies: Describe your understanding of the project and your approach for carrying out the work components. Be specific in describing the criteria or framework you will use in developing the research, analysis, and recommendations of Generational Wealth municipal strategies that best meet the needs of the IDT and align with the context of the Seattle Metropolitan Area. Please include strategies and tactics you would employ and indicate your experience or success in employing such an approach on other projects. Be explicit in describing how you will integrate principles of racial equity and representation and indicate your experience or success on other projects.
- Qualifications & Team Composition: Summarize team (including subconsultants, if any) qualifications and demonstrated experience analyzing community and/or economic development strategies, specifically as they relate to addressing race-based wealth gaps. Provide each team member's name, title and responsibilities within the project.
- Availability: Comment on the adequacy of the schedule of deliverables in the scope of work. Considering your firm's current and planned workload, comment on its capacity to complete the work within the time limitations identified in this RFP.
- Cost Proposal: Identify estimated hours and project costs associated with the proposal, indicating the hourly rates that apply to each team member and total estimated cost based on assigned tasks. Also include all additional expenses that the city would be charged and how the expenses will be calculated.

**BIPOC Generational Wealth Strategies  
Research & Analysis**

**Attachment C: References**

REFERENCES	
Reference 1	Reference 2
Name:	Name:
Phone:	Phone:
Email:	Email:
Project Worked On:	Project Worked On:
Date of Project:	Date of Project:
Is there anything else we should know about this reference?	Is there anything else we should know about this reference?