



## **Request for Proposal**

### **Strategic Positioning Analysis for the Davenport Institute**

Release Date:

Due Date: June 8, 2018

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## Request for Proposals for Strategic Positioning Process

### **About the Davenport Institute**

The Davenport Institute for Public Engagement and Civic Leadership seeks to build stronger communities in California by promoting public participation in local governance. From its unique home in the Pepperdine School of Public Policy, the Institute functions as a think-and-do tank. We work with local governments and non-profit organizations to both promote and support constructive and broad-based civic involvement in decisions that affect people where they live and work. We also promote public engagement within academia as a key skill for preparing 21st century leaders. Over the past decade, the Institute has positioned itself as a champion of public engagement through both practice and scholarship. (See Exhibit A for more details on the history and projects of the Institute)

In 2017 the Institute was invited to apply for, and received, a capacity-building grant from the James Irvine Foundation to ensure that the Institute remains strong and gains independence. This support comes at an opportune time for the Institute. It has now been more than a decade since its founding, and nearly a decade since it joined Pepperdine University. Under new leadership, the Davenport Institute is shifting from start-up mode to strategically position itself as a leader in the still emerging field of public engagement. In 2017, the Institute adopted formal mission and vision statements and formalized the role of the Advisory Council.

The Institute is now seeking a consultant to help with a formal strategic positioning process that will engage our stakeholders toward the following objectives:

### **Objectives**

- To identify the most important programs for the Davenport Institute to support and promote over the next 5 years.
- To assess whether or not Davenport Institute resources are properly aligned with the most important initiatives.
- To make recommendations to the Davenport Advisory Council on changes needed to support priorities.

### **Desired Work Program**

1. Engage stakeholder groups identified in the RFP to:

- Determine the most urgent programmatic and support needs of local government in pursuing constructive and broad-based public involvement in decisions that affect people where they live and work.
  - Determine whether efforts should be focused on providing technical consulting support (specific projects with cities), on building capacity within city staff, or some balance of both.
2. Inventory the current staff workload and how the workload is allocated toward existing Advisory Council priorities, Pepperdine University related academic programs, and day-to-day administrative requirements.
  3. Assess how the current workload aligns with the future priorities identified by the stakeholder engagement.
  4. In light of stakeholder engagement and workload assessment, analyze the Institute's present marketing strategies and offer recommendations for improvement to ensure that Davenport marketing strategies are properly targeted, contemporary, and integrated with Pepperdine Marketing & Communications.
  5. Identify opportunities for expanding Davenport Institute ongoing resources (staff, financing) to support key future priorities.

### **Key Stakeholder Groups**

The Davenport Institute has worked with a wide range of cities, counties, government associations, and individual practitioners in the last decade. The consultant will be encouraged to reach out to a sample of those with whom the Institute has already engaged to learn their perspectives on the work and how the Institute can best support them in public engagement going forward. These would include:

- **Practitioners:** Local government staff and elected officials: cities, counties, special districts, COGs
  - Former grantees and clients
  - Certificate alumni
  - Staff who have attended Institute trainings or conference presentations
- **Scholars/ Students:** Teachers, researchers and students in MPP/MPA programs as well as emerging fields like collaborative governance, civic engagement and dialogue & deliberation who may be housed in other programs including law and dispute resolution, government, political science and community service fields.
- **Pepperdine Community:** School of Public Policy, Integrated Marketing and Communications, other schools within the University\*
- **Davenport Institute Advisory Council** (see attached list of members)

The Davenport Institute is also interested in learning from those actors and agencies which have no experience with or knowledge of the Davenport Institute to determine if there are ways to support their public engagement effort. the consultant should determine how to gauge interest from such stakeholders, particularly cities and counties with underrepresented populations and groups.

### **Deliverables**

1. **Preliminary Report:** Upon completion of stakeholder engagement and workload inventory consultant will draft a preliminary report on the current position of the Davenport Institute.
2. **Advisory Council Retreat:** Consultant will attend an Advisory Council retreat at a California location to be determined to present preliminary report and recommendations and to facilitate Advisory Council discussion/ recommendations.
3. **Final Strategic Positioning Report:** Consultant will incorporate advisory council feedback/ recommendations into a final report to be presented to the project Steering Committee and project manager.

### **Steering Committee**

The chosen consultant will work with a Steering Committee comprised of the Davenport Executive Director Ashley Trim, Administrative Assistant Sarah Axen, and Advisory Council Members Rod Gould, Ken Hampian, Lydia Romero and Kurt Wilson. The Steering Committee will review proposals and select the consultant. Executive Director Ashley Trim will serve as the Project Manager.

Consultant should expect four meetings with the the Steering Committee:

- Initial interview - prior to consultant selection
- Kickoff meeting - including finalizing timeline and guidance on connecting with known stakeholders
- Pre-Advisory Council Retreat Meeting - review preliminary report and recommendations and finalize draft retreat agenda
- Final Meeting - review draft of final recommendations, provide any needed clarification.

### **Timeline:**

Adjustments to timeline must be made in consultation with the Project Manager

**June 8** - Proposal Submission deadline

**July 9** - Finalist interviews with Steering Committee

**July 31** - Consultant Selection

**September 10** - Project Kickoff Meeting with Steering Committee

**October 31** - Initial Report due to Steering Committee

**November 5** - Report review with Steering Committee

**November 14-15** - Advisory Council Retreat

**December 20** - Final Report due to Steering Committee

**January 11** - Final meeting with Steering Committee

### **Pre-Proposal Conference Call**

On **May 21, 2018 at 2 pm PDT**, potential proposers may call-in to discuss and ask questions about the Strategic Positioning Analysis. Project manager Ashley Trim will lead this call and will be joined by one or more members of the proposal team. The call number is 319-527-9112. Entry code 684-701.

### **Submitting a Proposal**

To be considered for this engagement, each consultant shall provide an individual proposal in electronic format submitted before the deadline of **5 pm, PDT on June 8, 2018**. The proposal should include the following components:

1. Description of the consultant, firm or organization proposing to do the work
2. Name and work histories of key staff who will be working on this project
3. A written work plan which demonstrates methods and approach to the work.
4. The name, title, phone number, and email address of three customer references who will attest to consultants knowledge of local government and public engagement
5. A portfolio (may be a website link) highlighting relevant experience with local government, nonprofit or education clients.
6. A complete, itemized price quotation for all services and deliverables involved in this engagement. Price quotation shall include additional costs such as travel, lodging, gas mileage, after-hours and weekend rates, etc.

### **Please email the proposal to this address:**

[davenport.institute@pepperdine.edu](mailto:davenport.institute@pepperdine.edu)

[Ashley Trim, Executive Director, Davenport Institute for Public Engagement and Civic Leadership (310)-506-6878]

The most qualified proposers will be invited to interview with the steering committee. The Davenport Institute reserves the right to reject all proposals.

### **Award**

Upon award of this project, the qualified contractor shall sign a Consulting Services Agreement provided by Pepperdine University. Pepperdine University will not pay for services prior to delivery and acceptance of each deliverable.

Those interested in submitting a proposal are encouraged to explore the Institute's website (<https://publicpolicy.pepperdine.edu/davenport-institute/>) to gain a fuller picture of the Institute's work.

## **Exhibit A:**

### **Davenport Institute History and Programs: The First 10 Years**

The Davenport Institute for Public Engagement and Civic Leadership was founded as a non-partisan, non-profit organization called *Common Sense California (CSC)*. Pete Peterson was hired as its founding Executive Director in 2007. Through funding first from the Hewlett Foundation and then from the James Irvine Foundation, CSC provided Public Engagement Grants to support California local governments seeking to engage residents in policy decisions affecting their community. This initial offering revealed a gap in local government understanding of public engagement, which CSC responded to by developing trainings and resources aimed at fostering public engagement as a local government leadership skill.

This increased emphasis on education led CSC to seek affiliation with a well-regarded school of public policy to: 1) bring greater authority and legitimacy to the training, 2) offer greater access to research and best practices and 3) provide opportunities to prepare the next generation of public leaders with the skills needed for public engagement while they were still in graduate school. In 2010, CSC officially joined the endowed Davenport Institute at the Pepperdine School of Public Policy to become the Davenport Institute for Public Engagement and Civic Leadership at the Pepperdine University of Public Policy.

Under the Pepperdine School of Public Policy umbrella, the Institute had new opportunities to be involved in public policy as an academic field (from papers, to conferences, to research projects, to teaching) while remaining focused on the practice of public engagement through its work with local governments and, in particular, through the guidance of a dedicated Advisory Council composed of approximately 20 current and former local government staff and elected officials from across the State of California.

Over the next six years, the Institute added a number of specialized trainings, introduced a regular course offering in public engagement at the School of Public Policy, continued its annual grant program, provided occasional consulting and facilitation for local government public engagement efforts and served as a “clearing house” to help local governments identify appropriate resources, consultants, and online processes.

During this time the Institute grew organically in response to emerging needs in an emerging field. It developed an Evaluation and Recognition Platform to help local governments assess their readiness for public engagement and to recognize those who had made engagement a key component of good governance. It developed a training for law enforcement which has become a regular offering of the California Police Chief’s Association. Davenport Institute staff and advisors frequently presented at a variety of government and academic conferences. The Institute has also partnered with others on

large research projects such as the California Civic Health Index and a set of surveys measuring the attitudes of government and civic leaders toward public engagement.

In 2016, Pete Peterson stepped away from his role as Executive Director to become the Dean of the Pepperdine School of Public Policy, and then-Assistant Director Ashley Trim was appointed to be the new Executive Director. Having worked with the Institute since it joined the School of Public Policy, Ashley brought significant institutional knowledge to her new role. Under her leadership, the institute has continued to explore new opportunities in both academia and practice, including the development and launch of a Professional Certificate in Advanced Public Engagement. This certificate has become a major offering. In the last year, the Davenport Institute decided to consolidate and refocus its grant program for greatest impact. In 2017, the Institute awarded a public engagement grant to the City of Hayward, CA which is working with Chabot College, a local community college, to engage residents in that city's Tennyson corridor, easily one of the most diverse census districts in the country.

The Institute is supported by an endowment from Pepperdine University, as well as by various small grants and small fee-for-service offerings. Historically, major program support has come from the James Irvine Foundation, but that Foundation is changing its grant structure and will no longer be supporting this type of programmatic work. The annual budget of the Davenport Institute is under \$300K. The Davenport Institute remains a very lean organization. Our entire paid staff consists of a full time Executive Director, half-time administrator and very part time Senior Fellow who serves as a strategy advisor.

Supplemented by occasional contracted trainers and facilitators, as well as strategic partnership with like-minded organizations, the Davenport Institute has been able to punch well above its weight. As a snapshot (far from comprehensive) of our work, in 2017 the Davenport Institute:

- Delivered 7 half-day training sessions deliver for municipal governments and 4 public engagement trainings for public safety.
- Co-hosted 2 webinars on public engagement.
- Presented at 5 conferences.
- Participated in 3 consortium conversations.
- Moderated 2 academic panels
- Presented a number of shorter guest lectures or keynotes at university and governance events across the country.
- Launched the professional certificate program.
- Explored methods for connecting public engagement with increased trust in police, and drafted an article highlighting key findings.
- Consolidated our annual grant program and began working with the City of Hayward.



- Recognized the cities of San Luis Obispo, CA and Kirkland, WA for their commitment to public engagement through our Public Engagement Evaluation and Recognition Platform.
- Drafted new case stories highlighting public engagement practices, and wrote guest posts on blogs of partner organizations.
- Facilitated a series of community conversations with the City of Palos Verdes Estates, CA.
- Hosted a demonstration of a Citizens' Initiative Review process at the Pepperdine Malibu Campus, drawing students from across California, and earning media coverage.
- Delivered 10 "Davenport Discussions" - lunchtime events for MPP students at the Pepperdine School of Public Policy
- Facilitated the School's City Manager in Residence program and served as faculty advisor for the School's student ICMA chapter.

**Exhibit B:**

**Davenport Institute Staff and Advisory Council**

Staff:

**Ashley Trim**, Executive Director (full time)

**Sarah Axen**, Administrative Assistant (half time)

**Rod Gould**, Senior Fellow Local Government Solutions (part time). Rod is also the retired City Manager of Santa Monica

Advisory Council:

**Anne Ambrose**, Director of Administrative Services, City of Palmdale

**Rick Bishop**, Executive Director, Western Riverside Council of Governments

**Matt Bronson**, City Manager, City of Inglewood

**Jim Friedl**, General Manager, Conejo Recreation and Park District

**Ken Hampian**, City Manager (ret.), City of San Luis Obispo

**Jim Keene**, City Manager, City of Palo Alto

**Deb Linden**, Former Police Chief, City of San Luis Obispo

**Justin Lovell**, Public Works Administrator, City of San Francisco

**Mike Parness**, City Manager, City of Napa

**Bev Perry**, Former Mayor, City of Brea

**Lydia Romero**, City Manager, City of Lemongrove

**Susan Sherry**, Executive Director, Center for Collaborative Governance at CSU Sacramento

**Kathleen Tiegs**, Director, Cucamonga Valley Water District

**Maureen Tobin**, Communications and Engagement Manager, City of Morgan Hill

**Kurt Wilson**, City Manager, City of Stockton