



**REQUEST FOR PROPOSALS:**

***Board Training Expert***

Coast to Coast Legal Aid (CCLA) is soliciting proposals from qualified firms for  
***Board Training Expert***

The term of the engagement shall be until completion of the evaluation and all timely requirements of this RFP.

The award shall be made to the offeror whose proposal is determined by CCLA to be the most advantageous to the organization. Evaluations shall be based on the factors set forth in the Request for Proposal and an evaluation of each response prepared. The review committee may contact the firms regarding their proposals for the purpose of clarification and record in writing the nature of the clarification. If it is determined that no acceptable proposal has been submitted, all proposals may be rejected. New proposals may be solicited on the same or revised terms or the procurement may be abandoned.

CCLA reserves the right to reject any or all proposals or to waive any non-material irregularities and technicalities. CCLA anticipates awarding one contract, but reserves the right to award more than one contract if in its best interest. If CCLA selects a proposal, CCLA will provide a written notice of the award.

The Proposer understands that neither this RFP nor the notice of award constitutes an agreement or a contract with the Proposer. A contract or agreement is not binding until a written contract or agreement has been executed by both CCLA and the successful Proposer.

### **GENERAL INFORMATION**

Coast to Coast Legal Aid of South Florida, Inc. (CCLA) is an LSC-funded non-governmental, nonprofit 501(c)3 law firm providing free civil legal assistance to low income residents of Broward County since January 2004. CCLA has provided legal advocacy for marginalized individuals in our community, helping thousands of economically disadvantaged residents to gain greater access to justice and much-needed legal assistance to remove barriers to a healthy and stable life.

CCLA provides free civil legal assistance in three primary unit areas of law: (1) The EACH Unit (Economic Advocacy and Community Health) provides free legal advice, limited services and representation to low income individuals and their families in the areas of Healthcare, Social Security disability and SSI, food stamps, TANF (Temporary Assistance for Needy Families) and Unemployment Compensation. (2) The Family law and domestic violence unit provides legal advice, counsel, and representation to victims of intimate partner violence for their family law cases including: Injunctions for Protection, Dissolution of Marriage, or Paternity Defense; (3) The Senior Citizen Law Project Provides legal advice and representation in the following areas: landlord-tenant and public/subsidized housing, eviction defense, health and public benefits, Medicaid, Medicare, managed care and long term care, foreclosure defense, bankruptcy (to save home), debt collection defense, defending garnishment of social security and wages, abuse, exploitation and representation of victims to obtain protective orders against abusers by family members;

and holistic legal services for veterans to avoid homelessness.

CCLA's 2020 annual budget was \$ 4,811,294 with a staff of 51 FTEs. Our largest funder, Legal Services Corporation (LSC) has imposed "special grant conditions" on our 2021 funding. This RFP is based upon those conditions which are outlined below. CCLA is required to respond to LSC by the dates listed by LSC and therefore **any proposal MUST address the timely submission of the deliverable by the proposer** with sufficient time for CCLA to report to LSC. **Your deadlines are in red**

1. Develop plan, and provide mandatory board training to all board members on the following topics by May 1, 2021: • board member fiduciary responsibilities, • managing conflicts of interest, • organizational leadership and leadership succession planning, • evaluation and oversight of program performance, • program policy governance, • internal controls and fiscal oversight, • executive director evaluation, and • compliance with LSC regulations. **Proposer plan due to CCLA no later than January 20, 2021.**
2. Develop a plan to develop protocols for ongoing board training and program orientation for all new members by May 1, 2021. **Proposer plan due to CCLA no later than January 20, 2021.**
3. Submit a report on the board training conducted and the development of protocols for ongoing board training and program orientation, which shall include the topics covered during the training provided, a list of board members who attended the training, and the protocols developed for ongoing training and program orientation. Please also indicate which board members have received program orientation. **Proposer plan due to CCLA no later than April 15, 2021.**

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### *Instructions for Respondents*

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## **SCHEDULE**

<b>Activity</b>	<b>Timeline</b>
<b>Solicitation Date:</b>	December 29, 2020
<b>Site Visit (not mandatory)</b>	<u>Due to coronavirus, this by appointment only: contact Patrice Paldino, Executive Director, at <a href="mailto:patricepaldino@legalaid.org">patricepaldino@legalaid.org</a>; include "site visit" in the subject line of your email</u>

<b>Deadline to Submit Questions:</b>	<b>By 5 PM on January 4, 2021</b>
<b>Responses to Questions Posted:</b>	<b>By 5 PM on January 5, 2021</b>
<b>RFP Responses due:</b>	<b>By 3 PM on January 7, 2021</b>
<b>Notice of Award:</b>	<b>By 3 PM on January 8, 2021</b>
<b>Agreement executed:</b>	<b>By January 11, 2021</b>
<b>Contract Effective Date:</b>	<b>January 12, 2021</b>

CCLA is on a very strict timeline and therefore will not entertain late proposals.

**1. SUBMITTING PROPOSALS**

Proposals must be saved in PDF format and emailed to [patricepaldino@legalaid.org](mailto:patricepaldino@legalaid.org).

NOTE: The subject of the email *MUST* include “Response to **Board Training Expert RFP**”.

CCLA reserves the right to reject proposals with or without cause and for any reason, to waive any irregularities and to solicit and re-advertise for other proposals. Incomplete or non-responsive proposals may be rejected by CCLA as non-responsive or irregular. CCLA reserves the right to reject any proposal for any reason, including, but without limitation, if the Proposer fails to submit any required documentation, if the Proposer is in arrears or in default upon any debt or contract to, or has failed to perform faithfully any previous contract with any not-for-profit or governmental jurisdiction. All information required by this RFP must be supplied to constitute a proposal.

**2. SCOPE OF WORK**

Develop a plan and provide mandatory board training, to all board members on the following topics by May 1, 2021: • board member fiduciary responsibilities, • managing conflicts of interest, • organizational leadership and leadership succession planning, • evaluation and oversight of program performance, • program policy governance, • internal controls and fiscal oversight, • executive director evaluation, and • compliance with LSC regulations. Provide all required reports according to the schedule outlined above.

**3. TECHNICAL REQUIREMENTS**

Proposers must have at least five years of experience in board training.

4. **PROPOSAL COSTS**

Neither CCLA nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this RFP. Proposers should prepare their proposals simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the RFP.

5. **INQUIRIES**

Proposers may email inquiries for interpretation of this RFP to [patricepaldino@legalaidthe.com](mailto:patricepaldino@legalaidthe.com) until **5 PM on January 4, 2021**. CCLA will not respond to inquiries received after **5 PM on January 4, 2021**. Please include "**Question Regarding Board Training RFP**" in the subject line.

CCLA will record its responses to inquiries and any supplemental instructions in the form of a written addendum. If addenda are issued, a link will be posted to the [coasttocoastlegalaidthe.com](http://coasttocoastlegalaidthe.com) website by 5:00 PM January 5, 2021. It is the sole responsibility of a Proposer to remain informed as to any changes to the RFP.

6. **DELAYS**

No delays are anticipated because of the short timeframe for compliance.

7. **PRE-PROPOSAL MEETING** No pre-proposal meeting is scheduled.

8. **PROPOSAL FORMAT**

In order to ensure a uniform review process and to obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified herein.

All information submitted by the Proposer shall be in PDF format with the PDF electronic signature or a wet ink signature provided via scanning.

All proposals shall be submitted as specified in this RFP. To be considered, the proposal must respond to all parts of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal. You may use this section to add relevant information but additional points will not be awarded for extraneous information in the appendix that are not responsive to the RFP.

Proposers shall prepare their proposals using the following format:

1. **Letter of Transmittal**

This letter will summarize in a brief and concise manner, the Proposer's understanding of the scope of work and make a positive commitment to provide its services on behalf of CCLA. The letter must name all of the persons authorized to make representations for or on behalf of the Proposer, and must include their titles, addresses, and telephone numbers. An official authorized to negotiate and execute a contract on behalf of the Proposer must sign the letter of transmittal.

## 2. Title Page

The title page shall show the name of Proposer's agency/firm, address, telephone number, name of contact person, date, and the Project name (i.e., "**Board Training RFP Proposal**")

## 3. Table of Contents

Include a clear identification of the material by section and by page number.

## 4. Organization Profile and Qualifications

This section of the proposal must describe the Proposer, including the size, range of activities, and experience providing similar services, including:

- Documentation indicating that it is authorized to do business in the State of Florida and, if a corporation, is incorporated under the laws of one of the States of the United States.
- A description of the primary individuals responsible for supervising the work including the percentage of time each primary individual is expected to contribute to this work.
- Resumes and professional qualifications of all primary individuals and identify the person(s) who will be CCLA's primary contact and provide the person(s)' background, training, experience, qualifications and authority.

## 5. Experience / References

The Proposer must describe its expertise in and experience with providing *Board training services* similar to those required by this RFP.

## 6. Approach to Providing Services

This section of the proposal should explain the Scope of Work as understood by the Proposer and detail the approach, activities and work products to be provided.

## 7. Compensation

The proposal shall document the fee proposal for the goods and/or services along with a proposed schedule of payments.

## 8. Additional Information

Any additional information which the Proposer considers pertinent for consideration should be included in a separate section of the proposal.

## 9. **PROPOSAL – Procedural Information**

### A. Interviews:

CCLA reserves the right to conduct personal interviews or require presentations prior to selection. CCLA is not responsible for any expenses which Proposers may incur in connection with a presentation to CCLA or

related in any way to this RFP.

**B. Request for Additional Information:**

The Proposer shall furnish such additional information as CCLA may reasonably require. This includes information, which indicates financial resources as well as ability to provide the services. Failure to provide additional information requested may result in disqualification of the proposal.

**10. EVALUATION METHOD AND CRITERIA**

CCLA shall be the sole judge of its own best interests, the proposals, and the resulting negotiated contract or agreement, if any. CCLA reserves the right to investigate the financial capability, reputation, integrity, skill, business experience and quality of performance under similar operations of each Proposer, including shareholders, principals and senior management, before making an award. Awards, if any, will be based on both an objective and subjective comparison of proposals and Proposers. CCLA's decisions will be final. CCLA's evaluation criteria may include, but shall not be limited to, consideration of the following:

1. Narrative describing methodology and scope of work (30 points)
2. Experience and expertise (20 points)
3. Technical merit and completeness of the proposal (5 points)
4. Fee proposal (40 points)
5. Small business / minority owned business (5 points)

**11. REPRESENTATIONS AND WARRANTIES**

In submitting a proposal, Proposer warrants and represents that:

1. Proposer has examined and carefully studied all data provided, and any applicable Addenda; receipt of which is hereby acknowledged.
2. Proposer has reviewed [lsc.gov](http://lsc.gov) for a review of LSC's structure and regulations. The proposer, while not required to be proficient in the LSC regulations, is familiar with the site and will refer to it as needed. Proposer is also satisfied as to all federal, state and local laws and regulations that may affect the cost and ability to perform the services specified in their proposal.
3. Proposer has given CCLA written notice of all conflicts, errors, ambiguities, or discrepancies that Proposer has discovered in this RFP and any addenda thereto, and the written resolution, if possible, by CCLA is acceptable to Proposer.
4. The RFP is generally sufficient in detail and clarity to indicate and convey understanding of all terms and conditions for the performance of the services to be performed.