



**REQUEST FOR
PROPOSALS(RFP):
STRATEGIC PLANNING
FACILITATOR**



Coast to Coast Legal Aid of South Florida, Inc. (CCLA) is soliciting proposals from qualified firms or professionals (“Facilitator(s)”) for:

STRATEGIC PLANNING

ORGANIZATIONAL OVERVIEW

CCLA is a Legal Services Corporation (LSC) funded, non-profit 501(c)3 organization that was established in 2003. CCLA provides free civil legal services to low-income and otherwise eligible residents of Broward County and is located in Plantation, Florida, a suburb of Fort Lauderdale. CCLA’s 2024 budget is approximately \$5 million with a staff of just under 50 FTEs. Our mission is to improve the lives of low-income persons in our community through advocacy, education, representation, and empowerment. 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. We believe all individuals are entitled to quality civil legal representation and equal access to justice, regardless of their income.

CCLA provides free civil legal assistance in three primary unit areas of law:

(1) The Family Law and Victims of Crime Unit provides legal advice, counsel, and holistic representation to pro se litigants, eligible clients, and victims of intimate partner violence, human trafficking, and victims of crime who are seniors including: Injunctions for Protection, Dissolutions of Marriage, Paternity Defenses, assertion and enforcement of victims’ rights in criminal cases, expungements for victims of human trafficking, housing, and benefits;

(2) The Senior Citizen Law Project provides legal advice, assistance, and representation to seniors age 60+ and caregivers in the following areas: landlord-tenant including, public/subsidized housing, eviction defense, health and public benefits, Medicaid, Medicare, naturalization to assist clients to qualify for SSI and Medicaid benefits, managed care and long term care, foreclosure defense, debt collection defense, defending garnishment of social security and wages, abuse, financial exploitation and representation of victims to obtain protective orders against abusers by family members; and

(3) The EACH Unit (Economic Advocacy and Community Health) provides free legal advice, assistance, and representation to low-income individuals and their families in the areas of healthcare access, Medicaid, Medicare, Social Security Disability and SSI, SNAP (food stamps), TANF (Temporary Assistance for Needy Families), and reemployment benefits.

RFP OVERVIEW

CCLA seeks the services of a facilitator who will assist CCLA in developing a strategic plan to realize our goal of organizational excellence and to provide more effective and efficient services that will have the greatest impact on Broward County individuals, families and the community.

Instructions for Respondents

SCHEDULE

Solicitation Date Announcement	January 26, 2024
Zoom Meeting with members of CCLA Management Team (not mandatory and only with appointment)	This is by appointment only. Contact CCLA at RFP-CCLA@legalaid.org and include "Zoom Meeting for RFP" in the subject line of your email.
Deadline to Submit Questions	By 5 PM on February 16, 2024
Responses to Questions Posted	By 5 PM on February 23, 2024
RFP Responses Due	By 5 PM on March 1, 2024
Notice of Award	By 5 PM on March 15, 2024
Contract Executed	By 5 PM on March 29, 2024
Contract Effective Date	By 5PM on April 1, 2024
Start date of Strategic Plan Process	April 1, 2024
Attend CCLA Board meeting to update on Strategic Plan	April 17, 2024
Completion date of Strategic Plan Process	May 31, 2024
Presentation of final Strategic Plan to Board	June 12, 2024

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

1. SUBMITTING PROPOSALS

Proposals must be saved in PDF format and emailed to RFP-CCLA@legalaid.org.

NOTE: The subject of the email *MUST* include “Response to **Strategic Planning Facilitator**”.

The term of the engagement shall be until completion of the strategic plan and all timely requirements of this RFP. The award shall be made to the Facilitator 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 RFP. The review committee may contact the firms/professionals regarding their proposals for clarification and record in writing the nature of the clarification. If CCLA selects a proposal, CCLA will provide a written notice of the award. CCLA anticipates awarding one contract but reserves the right to award more than one contract if in its best interest. 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 proposals with or without cause and for any reason, to waive any non-material irregularities and technicalities, and may 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 Facilitator fails to submit any required documentation or meet deadlines, if the Facilitator 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.

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

2. KEY ELEMENTS, STATED GOALS, & FOCUS OF THE STRATEGIC PLAN

- **Mission Statement and Vision** - CCLA desires to review and revise its current mission statement, purpose statement, and set a clear vision for future growth.
- **Rebranding and Marketing** - CCLA seeks to review and possibly revise its name, image, and logo design to distinguish itself from its sibling organization, Legal Aid Service of Broward County. Additionally, examine internal and external opportunities and perceptions impacting CCLA’s ability to achieve its mission.
- **Relocation** - CCLA is in search of a new office location that can accommodate our entire staff, is within a reasonable distance from the Broward County Courthouse, and is located near public transportation for applicants and clients. Part of Relocation

includes planning for the move, setting up infrastructure, announcing move to community, etc. This may also include starting a capital campaign to raise funds to purchase property in the future.

- **Unrestricted Funds** - The organization is primarily funded by federal grants which are accompanied by funding restrictions. CCLA needs to implement strategies to identify and create new fundraising campaigns and special events, increase the number of fundraising activities, maintain current donor relationships, identify and cultivate new donor/sponsor relationships, develop an annual gift giving program to increase CCLA's unrestricted funds, etc.
- **Recruitment and Retention of Staff** - CCLA is located in Broward County which is the second largest county in the state of Florida. Due to Broward County's high costs of living, recent inflation costs, and lack of, and reduction in, funding, it is difficult for CCLA to offer a competitive salary and incentives to allow the organization to recruit and retain highly qualified staff, including diverse staff. CCLA needs to implement strategies and identify new grants and/or revenue to increase its annual budget, which would allow the organization to offer a competitive salary and raises and incentives to staff.
- **Organization Growth and Development** - As previously stated, CCLA is located in Broward County, which is the second largest county in Florida. Since the Covid-19 pandemic, the state of Florida and Broward County have experienced a significant increase in new residents. Since 2003, CCLA has served the community and has grown over the years. It is CCLA's desire to develop and implement strategies that will expand and enhance the organization, which will allow CCLA to serve Broward & Collier Counties in its service region and the growing need for legal assistance.
- **Board of Directors Growth and Development** - Review Board of Directors bylaws and culture to encourage engagement, enthusiasm, and contribution.
- **Innovation** - improve CCLA's technology, centralized intake, online intake application, encourage innovation and innovative ideas for the delivery of legal services, etc.

3. **SCOPE OF WORK**

- The strategic planning Facilitator will work closely with CCLA Management and other designated staff, as well as members of CCLA's Board of Directors to develop and execute a five-year strategic plan.
- Conduct an opening meeting with CCLA Management and/or Strategic Planning Team, conduct conference calls, virtual or in-person meetings, and in-person interviews with Board of Directors, CCLA Management, Managing Attorneys, and other staff as needed.
- Gathering and analyzing information through document review including CCLA's 2022 Needs Assessment, surveys from CCLA staff, clients, community partners, and stakeholders.
- Interviews with key stakeholders.
- Conduct meetings with focus groups and community partners if necessary.
- Develop and implement a process for engaging CCLA staff and its Board in the strategic planning process.
- Assist with development and finalization of a long-term organizational Strategic Plan.

- Preparation and presentation of the final Strategic Plan to management and the Board of Directors.
- The successful Facilitator will have a dedicated staff person(s) assigned to the strategic planning project, including a primary point of contact for the duration of the engagement.

4. **TECHNICAL REQUIREMENTS**

Facilitators must have at least five years of experience in strategic planning. Experience leading strategic planning for legal aid organization(s) and knowledge of legal service organizations is preferred.

5. **PROPOSAL COSTS**

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

Pricing must be itemized and include a written explanation of all fees and costs, including travel costs if any. CCLA is a 501(c)(3) tax-exempt organization.

6. All deliverables and work product produced will be owned by CCLA, its successors and assigns. Materials submitted in response to this RFP will not be returned.

7. CCLA reserves the right to change this RFP schedule or issue amendments to this RFP at any time. CCLA reserves the right to cancel or reissue the RFP.

8. The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services.

9. **INQUIRIES**

Facilitators may email inquiries for interpretation of this RFP or other questions to RFP-CCLA@legalaid.org until **5 PM on February 16, 2024**. CCLA will not respond to inquiries received after **5 PM on February 16, 2024**. Please include **"Question Regarding Strategic Planning 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 coasttocoastlegalaid.org website **by 5:00 PM February 17, 2024**. It is the sole responsibility of Facilitators to remain informed as to any changes to the RFP.

10. **DELAYS**

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

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

12. **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.

RFP Proposals/Responses must be delivered via email to RFP-CCLA@legalaid.org. All information submitted by the Facilitators shall be in PDF format with a 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.

Facilitators shall prepare their proposals using the following format:

A. **Letter of Transmittal**

This letter will summarize in a brief and concise manner, the Facilitator'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 Facilitator, and must include their titles, email addresses, and telephone numbers. An official authorized to negotiate and execute a contract on behalf of the Facilitator must sign the letter of transmittal.

B. **Title Page**

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

C. **Table of Contents**

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

D. **Organization Profile and Qualifications**

This section of the proposal must describe the Facilitator, 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(s) and provide the person(s)' background, training, experience, qualifications and authority. The person(s)' experience in working with non-profit organizations and/or legal services organizations for strategic planning.
- Your opinion on five critical factors that contribute to successful strategic

assessment.

- Your unique capabilities/experiences that you bring to the process.

E. Experience / References

The Facilitator must describe its expertise in and experience with providing strategic planning services similar to those required by this RFP. The Facilitator must provide three references and three examples of completed strategic plans.

F. Approach to Providing Services

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

G. Compensation

The proposal shall provide the fee proposal for the goods and/or services along with a proposed schedule of payments, proposed project schedule, and timeline.

H. Additional Information

Any additional information which the Facilitator considers pertinent for consideration or that provides additional features or value should be included in a separate section of the proposal.

13. PROPOSAL – Procedural Information

Interviews:

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

Request for Additional Information:

The Facilitator 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.

14. 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 Facilitator, 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 Facilitators. CCLA's decision will be final. CCLA's evaluation criteria may include, but shall not be limited to, consideration of the following:

- A. Narrative describing methodology and scope of work (30 points)
- B. Experience and expertise (20 points)
- C. Technical merit and completeness of the proposal (5 points)
- D. Fee proposal (40 points)
- E. Small business / minority owned business (5 points)

15. REPRESENTATIONS AND WARRANTIES

In submitting a proposal, Facilitator warrants and represents that:

- A. Facilitator has examined and carefully studied all data provided, and any applicable addenda; receipt of which is hereby acknowledged.
- B. Facilitator has reviewed www.lsc.gov for an overview of LSC's purpose and regulations. The Facilitator, while not required to be proficient in the LSC regulations, is familiar with the site and will refer to it as needed. The Facilitator 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.
- C. Facilitator has given CCLA written notice of all conflicts, errors, ambiguities, or discrepancies that Facilitator has discovered in this RFP and any addenda thereto, and the written resolution, if possible, by CCLA is acceptable to Facilitator.
- D. 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.
- E. The Facilitator will discuss the approach to using data in the strategic planning process and to developing success metrics as part of strategic plans.
- F. The plan will be affordable, useful, and practical to implement. The plan will successfully achieve stated goals.