



REQUEST FOR PROPOSALS Strategic Planning

I. Summary of Essential Information

- RFP Issued: July 20, 2026
- **Proposals Due:** **August 31, 2026 @ 4:30 p.m. MST**
- Selection: On or before September 18, 2026
- Work Commences: October 5, 2026
- Draft Report: March 5, 2027
- Final Report: On or before April 2, 2027
- Present to Board of Directors: May 5, 2027
- Respond to: Sharon Sargent CLSBids@clsaz.org

II. About Community Legal Services

Community Legal Services was incorporated in 1952 and is one of three Legal Services Corporation (LSC) funded legal aid firms serving the State of Arizona and Tribal Nations. Founded in Maricopa County, over the years, CLS expanded to serve five counties in Arizona – La Paz, Maricopa, Mohave, Yavapai and Yuma Counties. CLS has offices located in Kingman, Phoenix, Prescott, San Luis and Yuma.

CLS is dedicated to increasing fairness in the civil justice system and balancing the scales of justice for Arizonans with low incomes. Our five main practice areas are Housing, Public Benefits, Consumer, Employment and Family Law. CLS is also home to the statewide Farmworker Program. CLS provides this service and support through a staff of approximately 90 team members and our Volunteer Lawyers Program. Every day these talented, passionate individuals strive to ensure the amount of money someone has does not dictate the level of justice they receive.

CLS is led by a Board of Directors of between 21 to 30 members, including attorney, client-eligible and public members. CLS' annual budget is approximately \$11 million. Approximately 60% of our current budget is from the Legal Services Corporation.

305 S. 2nd Ave, Phoenix, AZ 85003 Phone 602-258-3434

Advocate. Litigate. Educate

III. Scope of Work

Community Legal Services (CLS) is seeking proposals from qualified consultants or firms to assist CLS in creating a strategic plan for the next four (4) to five (5) years, and an implementation plan. The strategic planning consultant will work with a steering committee, including staff and board members, to develop these plans. The strategic plan should:

- Clearly define and articulate CLS' mission, vision, core values, messaging/ brand positioning in relation to key audiences and set out what we want CLS to look like in 4 – 5 years; and
- Set out clear, prioritized organizational goals and objectives, including program goals and organizational development goals; and
- Include infrastructure review, including administrative staffing, compliance and organizational structure with recommendations to ensure appropriate measures are in place for service delivery support; and
- Include recommendations for enhanced outreach and awareness strategies with attention to underserved communities; and
- Include recommendations for enhanced board participation in fundraising, public awareness activities and program oversight; and
- Address the impact of the proposed goals for CLS' delivery of services to our clients, community needs, fundraising, diversification of funding, staffing, technology and facilities; and
- Include an implementation plan with timetables and benchmarks; and
- Include a framework for quarterly and annual monitoring and reevaluation under the plan; and
- Be written as an outward-facing document that CLS can share, in whole or in part, with funders and other stakeholders.

IV. Budget

CLS has budgeted \$30,000 - 40,000 for this project.

V. Proposal Format

Please be concise when responding to this RFP. Responses should not exceed 10 pages and should include:

- One-page executive summary or cover letter
- Relevant background and experience; prior work in organizational/ strategic planning
- Description of proposed approach to facilitating the strategic planning process and producing requested deliverables

- Description of how your approach will ensure the strategic plan will be achievable with CLS' reasonably foreseeable budget and/or include activities aimed at recruiting the resources needed to implement the plan
- Describe how staff, board, community members, partners and stakeholders will be engaged in the process
- Detailed budget and payment schedule, including number of onsite visits and cost per trip, data gathering and analysis and other costs associated with the process
- At least three (3) professional references with contact information (contact person, organization name, address, telephone number and email address), including at least one from an organization that has completed or has begun implementing a strategic plan for which the vendor provided strategic planning services

VI. Evaluation Criteria

- Clear, customized, logical goals and action steps
- Experience and success with similar organizations; alignment with CLS' mission and culture
- Staff qualifications
- Cost and value
- Timeline
- References

VII. Terms and Conditions

- All deliverables will be owned by CLS, its successors and assigns.
- CLS will not pay vendor costs associated with preparing responses to this RFP.
- CLS reserves the right to modify or cancel this RFP.
- This document represents an initial request for proposals only and in no way should it be construed as a contract or letter of intent.
- CLS reserves the right to refrain from contracting with any vendor that has responded to this RFP, whether the vendor's response has been evaluated and whether the vendor has been determined to be qualified. Exercise of this reserved right does not affect CLS' right to contract with any other vendor.
- CLS will interview the final candidate(s). If a candidate declines a request for an interview or demonstration for any reason, the candidate may be eliminated from further consideration. Vendors who are not selected will be notified by email.

VIII. Non-Endorsement

- The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to CLS in any literature, promotional materials, brochures, sales presentations or the like without the express written consent of CLS' Executive Director or Deputy Director.

IX. Inquiries

Questions about this RFP may be directed to Sharon Sergent, Executive Director, at CLSBids@clsaz.org.