



REQUEST FOR PROPOSAL (RFP)
STRATEGIC PLANNING
FOR LEGAL AID SOCIETY OF SAN DIEGO

RFP Issue Date: February 21, 2024
RFP Submission Deadline: April 30, 2024

RESERVATION OF RIGHTS: By submitting a proposal, the respondent understands and agrees to the reservation of rights by Legal Aid Society of San Diego as listed in this Request for Proposal. LASSD reserves the right to amend or cancel this Request for Proposal at any time.

Issued: February 21, 2024
Request for Proposal (RFP)
STRATEGIC PLANNING
for Legal Aid Society of San Diego

1. Invitation

Legal Aid Society of San Diego (LASSD) is seeking proposals from qualified consultants, firms, or professionals (“Facilitator(s)”) to assist the organization in creating a strategic plan for the next three-year period from 2025-2028. LASSD seeks a Facilitator with the most advantageous balance of quality, performance, and price for the services requested. The goal is to ensure a specific and actionable plan that effectively meets our objectives.

LASSD is actively seeking diverse firms that align with our commitment to racial equity. Your organization's dedication to promoting diversity and inclusivity is highly valued, and we encourage you to submit a proposal. We believe that a range of perspectives and experiences will enrich our strategic planning process and help us create a more equitable future.

2. Introduction

LASSD, incorporated under its current name in 1953, is a nonprofit poverty law firm that has been providing free legal services to lower income San Diego residents for more than 100 years. LASSD provides legal services in the areas of landlord-tenant law, public benefits, immigration, family, housing discrimination, consumer protection, health, federal tax disputes and many other subject matter areas. LASSD has three offices in San Diego County, with clinic locations in many of the San Diego Superior Courthouses. LASSD currently has over 220 employees.

3. Scope and Objectives

- **Relocation or remodel:** LASSD needs to decide whether to engage in substantial remodeling of its headquarters or search for a new office building. Any office location must be able to accommodate necessary staff, be strategically located within a reasonable distance from one of the San Diego County Courthouses or another prime service location and be located near public transportation in order to be accessible to applicants and clients. Part of this process includes planning for the move, selecting a location, 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 or remodeling of the current headquarter.
- **Unrestricted Funds:** The organization is primarily funded by federal grants which are accompanied by funding restrictions. LASSD 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 LASSD's unrestricted funds, etc.

- **Recruitment and Retention of Staff:** LASSD is located in San Diego County which is the second largest county in the State of California. Due to San Diego County's high costs of living, recent inflation costs, and lack of, and reduction in, funding, it is difficult for LASSD to offer a competitive salary and incentives to allow the organization to recruit and retain highly qualified staff, including diverse staff. LASSD 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, LASSD is located in San Diego County, which is the second largest county in California. Since the Covid-19 pandemic, the State of California and San Diego County have experienced a significant increase in new residents. Since 2003, LASSD has served the community and has grown over the years. It is LASSD's desire to develop and implement strategies that will expand and enhance the organization, which will allow LASSD to serve San Diego County in its service region and the growing need for legal assistance.
- **Board of Directors Growth and Development:** Review Board of Directors bylaws, recruiting and selection process, and culture to encourage engagement, enthusiasm, and contribution.
- **Innovation:** Improve LASSD's technology, centralized intake, online intake application, encourage innovation and innovative ideas for the delivery of legal services, etc.

Development and implementation of a strategic planning process to include meaningful input from the Board, management, staff, and community stakeholders. The final product should include a written plan with goals, interim benchmarks, timelines for task completion, and identify those responsible for completion. The plan should also include measures against which to assess progress and a mechanism for tracking implementation, including regular reports to the Board.

The consultant is expected, at minimum, to perform the following under this contract:

1. Design and establish a comprehensive strategic planning process.
2. Develop a three-year strategic plan consistent with the above-cited objectives.
3. Provide recommendations and implementation strategies for this plan.

It is anticipated that these tasks will be accomplished through a combination of:

- Review of LASSD printed material, publications, and website, outreach and marketing materials, educational program materials, development documents, and relevant research documents.
- Review and incorporation of LASSD's most recent Needs Assessment (estimated completion date of August 1, 2024) to ensure that we remain relevant over the next three years that may include interviews and surveys of members of the Board, management team, staff, and community stakeholders, (including the legal services and client communities) or other creative means of gathering data and relevant input.
- Focus groups, public forums, committee meetings, and/or any other method that will be useful in receiving input (email, website, etc.) that identify dominant issues, design consensus building objectives and strategies that can be implemented.

The successful candidate will be expected to collate the data and analyses into a comprehensive strategic plan document, with feedback from LASSD's Executive Management Team.

At the conclusion of the project, it is expected that the final product will reflect a clear statement of LASSD's mission, vision and core values that encapsulate its purpose, uniqueness, and direction moving forward. The product will be packaged in a format presentable for marketing and public distribution.

The 2025-2028 Strategic Plan is to be presented to LASSD's Board of Directors during the December 2024 or January 2025 Board Meeting.

4. Deliverables

All products and recommendations identified during this engagement will be documented and reviewed with the LASSD Executive Management Team. All deliverables produced during the engagement are for LASSD's sole use. All work papers, analyses and final reports will remain the property of LASSD and may not be distributed or released to others without the prior written consent of LASSD.

Project Deliverables under this contract will include the following:

- Strategic planning project plan including tasks, dates, deliverables, and progress meetings.
- Copies of all instruments used to gather information from the client and legal community, including needs analysis surveys and interview questions.

- Interim briefings with LASSD committee for feedback on direction of the plan.
- Final 2025-2028 strategic plan, that specifies goals, objectives, strategies, timeline, and required resources (i.e., financial and human) for implementation incorporating necessary revisions along with a presentation for LASSD.
- Recommendations and implementation strategies for this plan, with Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART) goals prioritized by year or quarter, etc.

5. Proposal Submission Requirements

Please submit the following with the proposal in a single PDF file as an email attachment:

1. Responder's full legal name.
2. Responder's head office mailing (for billing) and website address.
3. Name, telephone number, email address of the responder's designated contact person.
4. Federal Taxpayer ID for the responder.
5. Expertise of the responder, including the core focus of services provided.
6. A brief statement of your understanding of the services to be performed; include your added value of your services and differentiation from competitors, and your approach and methodology for providing these services.
7. Describe your experience providing similar services. Explain your history working with legal services organizations, including knowledge of resources available to nonprofits.
8. Provide a sample of similar work.
9. Total proposed project cost itemized as appropriate.
10. Names of principal staff and key personnel who will provide the services. Submit resumes and qualifications for each key staff person, with summaries of experience and expertise.
11. Describe each person's role and responsibility with the project. Any substitutions of staff after the award of the contract will require the approval of LASSD.
12. Signature of an officer or designee legally authorized to bind the applicant to the proposal cost and schedule.
13. Provide the name, title, address, and contact information of three references for clients of similar size for whom you have provided the same or similar services. Provide information on the actual services provided and length of time services have been provided to the client, along with a snapshot of the nature of the client's business.

14. RFP respondents shall bear all costs associated with the proposal meeting(s), interview(s), preparing, and submitting their bids. LASSD shall in no event be responsible for or liable for those costs.

6. Evaluation Criteria

Proposals will be evaluated based on the consultant's responsiveness to the RFP, qualifications, references, and the total price quoted for all items covered by the RFP. The following will be reviewed and scored with a decision made based on the responses:

- Overall proposal quality, which includes compliance with all RFP requirements, in a well-organized, and easy-to-follow format.
- Proven successful experience with similar projects.
- Clear description of the services to be provided, with project timeline, payment schedule, final deliverables.
- Familiarity with the delivery of legal services to low-income individuals.
- Demonstrated commitment to racial equity and promotion of diversity.
- Familiarity with San Diego County demographics and resources highly desirable.
- Results of information obtained from client references.
- Ability/commitment to meet our desired time deadlines.
- Budget/costs.

The successful bidder may be asked to participate in negotiations and/or to revise their proposal based on the negotiations. In submitting a proposal, each consultant acknowledges that they have read and understand these requirements.

7. Award of Contract

Award of the contract resulting from this RFP will be based upon the most responsive bidder whose offer will be the most advantageous to LASSD in terms of cost, experience, assessment of the quality of past work, and other factors as specified elsewhere in this RFP.

LASSD reserves the right to:

- Consider proposals based on their relative merit, risk, and values to the organization.
- Negotiate with all respondents to the RFP.
- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential consultant, when it is in LASSD's best interest.
- Accept an offer that is not the lowest priced offer.

Competitive proposals will be considered and will result in a Fixed Price Contract.

RFP respondents may be asked to revise their proposal based on further negotiations. This document represents an initial request for proposals only and in no way should be construed as a contract or letter of intent.

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

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

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

8. Rejection of Proposals

LASSD reserves the right to accept or reject any and all proposals and to waive any minor discrepancies or technicalities in the proposal or specifications, which are required to complete this project, or when deemed to be in the best interest of LASSD.

9. Proposal Costs

Neither LASSD 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. LASSD is a 501(c)(3) tax-exempt organization.

10. Proposal Delivery and Due Date

Proposals are due to LASSD on or before April 30, 2024, at 5:00 p.m. PST. Proposals shall be emailed in a single PDF file to Daniel Benson at danielb@lassd.org. You will be sent confirmation of email receipt. If you do not receive a receipt within two business days, please contact Mr. Benson. Proposals submitted in any manner other than as detailed in this section or submitted after the deadline, shall be deemed invalid and may be excluded from consideration.

**Please address your proposal to Joanne L. Franciscus, CEO/Executive Director/Chief Counsel.

11. Timeline and Milestone Dates

- Request for Proposals issued: February 21, 2024
- Questions regarding this RFP due by March 31, 2024

- Proposals due to LASSD: April 30, 2024
- Contract start date: July 1, 2024
- Draft plan due to LASSD: Oct 1, 2024
- Completion date: Nov 1, 2024
- NOTES:
 - As part of the selection process, LASSD may conduct interviews with a shortlist of RFP respondents being considered for this contract. LASSD must proceed through a fiscal process prior to award. Should announcement of the award be delayed due to this process, all respondents will be advised as to the delay and anticipated release of Notice of Award.
 - Above-listed deadlines are an estimate. Actual deliverable deadlines will be negotiated with the Respondent/Contractor. (There may be advantages to spreading the study over a longer period; we will discuss this option with our shortlist of RFP respondents during the further interview/negotiations states.)

12. Inquiries/Contact Information

Direct any questions to Daniel Benson, Directing Attorney: danielb@lassd.org or 619-471-2665.