

February 1, 2012

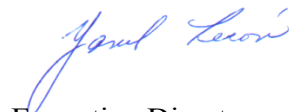
To Whom May I Concern:

The *Center For Latino Progress – CPRF (the Center)* is seeking proposals from consulting firms for the development of a comprehensive Strategic Plan. The strategic planning process should result in actionable recommendations regarding the scope and delivery of Center programming, effective recruitment and deployment of board capabilities and competencies, and re-defining the Center's image and brand in light of changes in the organization and the environment in which it operates. Having in 2011 undertaken a thorough revision of its by-laws and renamed itself (the Center was formerly known as the CT Puerto Rican Forum), and with a new board leadership now in place, the Center has set a very aggressive timetable for the envisioned planning process. While it recognizes the need to provide adequate time for participation and review by key stakeholders, the board expects the process to be completed by May 30. The outcome of the process will be a written strategic plan document that defines the specific opportunities and strategies that will guide the Center's work for the next 3 years, and describes the planning process, research, and analysis that led to them. The Center expects that the process will include an environmental scan, a SWOT analysis, and a process for developing a statement of mission/vision/values, issues and goals, strategies, objectives, timelines, and activities appropriate to the next chapter in the Center's organizational life.

Firms will be selected for this project based on criteria stated in Section Proposal Submission. Only firms submitting proposals by the deadline date will be considered. The proposals must be received by February 17, 2012 and sent to:

Center For Latino Progress – CPRF
Att: Nancy Pérez
95 Park Street, 2nd fl.
Hartford, CT 06106

Sincerely,

A handwritten signature in blue ink, appearing to read 'Paul Leon'.

Executive Director

REQUEST FOR PROPOSAL FOR STRATEGIC PLANNING

RFP Process

It is expected that one (1) firm will be selected as a result of the RFP, although the Center is under no obligation to award a contract as a result of the selection process. Based on the proposals received, the selection committee will select up to three (3) firms to be interviewed. As a result of those interviews a firm will be selected for contract negotiations. Bidders are welcome to include subcontractors in their proposals, but the Center's contract will be with the lead firm only.

Background (The information below will be forwarded to responders at their request).

- Background information on the agency
- Organizational structure, functions and staffing
- Any interfaces with other organizations or relationship to other projects
- Historical information and other work completed or in process
- Pertinent Data about budget, personnel and operations

Scope of Services

A. Project Coordination

The Center expects the Consultant to coordinate with the assigned staff and appointed board committee throughout the course of the project. Regular meeting and status reports are expected to keep the project on schedule and to keep all identified stakeholders apprised of the progress of the planning process.

B. Planning Process

The planning process is as important as the final product. The Center desires a process that is inclusive and collaborative. The involvement of staff and key stakeholders in the process is critical to its success. We anticipate that the process will engage the stakeholders in planning the future and serve as an opportunity for increased public/private sectors awareness of the role Center plays in community development and vitality.

- Proposed Project Schedule to Develop Strategic Plan

C. Needs Assessment/Environmental Scan

This component can include any but is not limited to the following tasks.

- a. Review of existing plans and documents pertinent to the strategic plan.
- b. Development of a demographic profile of the population served and community characteristics pertinent to strategic planning.
- c. Identification of trends, advocacy issues and economic development patterns pertinent to strategic planning.
- d. Assessment of the values, strengths, weaknesses and competencies of the organization.
- e. Identification of any competitors and assessment of their capabilities to compete with the Center in delivering services.
- f. Completion of a needs assessment that involves stakeholders, users and non users in the process and utilizes valid research mechanisms to gauge public opinion and identify future needs.

D. Assessment Report

E. Organizational Development Plan

F. Board Development Plan

G. Identification of Opportunities, Strategies and Vision

- a. Outline a vision for the Center that identifies priorities, opportunities and strategies that will clarify its role and confirm its mission and values. Establish action plans (objectives, resource needs, sustainability projection/plan, roles and responsibilities for implementation)

H. Strategic Plan Document and Executive Summary

- a. Preparation of final plan document for staff/board review and presentation. A master plan that includes an appendix with indicated materials below. Executive Summary and power point presentation copies for the board members, staff, and identified stakeholders. The power point presentation should include key components and documentation that substantiate findings, recommendations, and action plans.

Appendices

- I. *Action Planning* -- Specifies objectives, responsibilities and timelines for completion of objectives
- II. *Description of Strategic Planning Process Used* -- Describes the process used to develop the plan, who was involved, the number of meetings, any major lessons learned to improve planning the next time around, etc.
- III. *Strategic Analysis Data* -- Includes information generated during the external analysis and internal analysis and includes listing of strategic issues identified during the these analyses
- IV. *Goals for Board and Executive Director* -- Goals of the board and ED should be directly aligned with goals identified during strategic planning. This appendix will list goals for the board and can include recommendations for redesigning board committees to be associated with strategic goals. *Board Development Plan*. The appendix also lists goals for the ED goals -- these can be used (along with the ED job description) to form the basis for performance evaluations of the ED.
- V. *Budget Planning* -- Depicts the resources and funding needed to obtain and use the resources needed to achieve the strategic goals. Budgets are often depicted for each year of the term of the strategic plan
- VI. *Operating Plan* -- Describes the major goals and activities to be accomplished over the coming fiscal year.
- VII. *Financial Reports* -- Includes last year's budget (with estimated expenses and the actual amounts spent), this year's current budget (again with estimated amounts and actual amounts spent), a statement of financial position, statement of financial activities, etc.
- VIII. *Monitoring and Evaluation of Plan* -- Include criteria and mechanisms for the monitoring and evaluation of plan implementation, including assignment of responsibilities and frequencies of plan implementation assessment and review.
- IX. *Communication of Plan* -- Describe the actions that will be taken to communicate the plan and/or portions of it, and to whom.

Proposal Submission

1. A proposal describing your qualifications (or the qualifications of the team of consultants) and how the tasks described above would be carried out.
2. A firm estimate of fees to be charged, and an estimate of expenses that would be incurred
3. Resumes of all consultants who would be involved in the project.

4. Names, phone numbers and contact people at three nonprofit organizations who have been your clients during the last 18 months, whom we can call on as references.
5. Interviews of the selected firms will be conducted no later than **March 2**. A final selection will be made by **March 7**, and it is expected work by the successful bidder will begin by **March 12, 2012**.

Evaluation of Proposals

A selection committee of qualified people will be assembled to review and evaluate the submitted proposals. The selection committee will rank proposals based on the criteria stated below.

- a. Experience and expertise of the proposer(s) particularly in strategic planning
- b. Relevancy of similar work experience
- c. Approach to the project and philosophy towards strategic planning
- d. Understanding of the scope of the project and a logical methodology for carrying out the tasks in the scope of work.
- e. Demonstrated ability to lead, facilitate and coordinate project
- f. Availability of firm's personnel for meetings
- g. Experience working with ethnically, socially, and culturally diverse communities
- h. Proposed Costs and Payment Terms

The Center reserves the right to reject any and all proposals received as a result of this RFP. The Center is under no obligation to award a contract as a result of this RFP.