



TO: Prospective Vendors
FROM: Toby L Berry
Chief Executive Officer
DATE: June 30, 2021
RE: Request for Proposals: Strategic Planning and Community Needs Assessment & Report

Community Action Agency, a private non-profit organization, is seeking proposals from consultants and or firms for the development of a comprehensive Community Needs Assessment and Strategic Planning. Community Action Agency will consider proposal for both the needs assessment and strategic planning or for one of the aforementioned.

Community Action Agency anticipates that the assessment process will take six to nine months, to provide adequate time for participation and review by key stakeholders to include agency participants, staff, and other groups to be identified in the proposal. The outcome of the process will be a written assessment that presents the methodology, the research, the analysis, trends and service gaps impacting low-and-moderate-low income individuals/families within the agency's three-county service area. The finished document will serve as a guide that the agency will utilize in planning and development of the next Strategic Plan and provision of services.

The process for strategic planning is expected to take three to six months, to provide adequate time for Community Action Agency's participation and review by key stakeholders and policy makers. The outcome of the process will be a written strategic plan document that presents the planning process, the research, the analysis, opportunities and strategies that will guide CAA for the next two to three years.

We invite you to submit written proposals in response to the "Strategic Planning and Community Needs Assessment & Report." A hard copy of the information is attached or it can be found on our website at www.caajlh.org.

If you choose to respond, proposals must be submitted in accordance with the guidelines provided by **4:00 PM of September 1, 2021**. One (1) copy of the complete proposal, as outlined, should be submitted electronically, by mail or hand delivered to:

Community Action Agency
Attn: Katrina Duling
1214 Greenwood Ave
Jackson, MI 49203
kduling@caajlh.org

Please note that all electronically submitted proposals will receive a confirmation within 48 hours to verify receipt of required documents.

If you have any questions, please contact Toby Berry, at 517-784-4800 or tberry@caajlh.org. Thank you in advance for your interest in this opportunity.

Sincerely,

Toby L Berry, CEO

Community Action Agency – Mission, Values and Principles

The mission of Community Action Agency is providing a local approach to address the causes and conditions of poverty by promoting self-sufficiency in Jackson, Lenawee and Hillsdale Counties through programming, advocacy and leadership to low income residents of Jackson, Lenawee and Hillsdale counties.

This is accomplished through the provision of multiple services aimed at self-sufficiency, education, and support.

Community Action Agency has been providing services to low- and moderate-income individuals and families since 1965 in Jackson, Hillsdale and Lenawee counties. The agency currently operates 60+ programs with over 230 employees working in 3 Agency operated locations, multiple public-school buildings and community centers.

Community Action Agency is one of 28 independent community action agencies in the state of Michigan. Community action agencies in this state network collaborate with numerous and varied local and state agencies and organizations to promote self-sufficiency and support individuals and families to become economically secure and invested members of their local communities.

Community action agencies administer a wide range of programs that meet the needs of local communities, including early childhood programs (Head Start, Early Head Start, Great Start Readiness Program), YouthBuild, Lead Remediation, Low-Income Weatherization Assistance Program, Low-Income Heating Assistance Program, Home Buyer and Foreclosure Programs, among others.

For additional background information on Community Action, please reference these sites:

National Community Action Foundation <https://www.ncaf.org>

Community Action Partnership <http://www.communityactionpartnership.com>

Michigan Community Action Agency Association <http://www.mcaaa.org>

Community Action Agency <http://www.caajlh.org>

Our commitment to changing the policies and culture of our organization is enhanced by our work as a Trauma Informed Agency, our embracement of Diversity, Equity and Inclusion, and our commitment to being an Anti-racist Organization. Community Action Agency seeks to expand attitudes and skills through didactic, educational and training opportunities.

Community Action Agency receives **Community Services Block Grant (CSBG) funding**. The Community Services Block Grant (CSBG) provides funds to alleviate the causes and conditions of poverty in communities. The Legislative Authority is Community Opportunities, Accountability, and Training and Educational Services Human Services Reauthorization Act of 1998, P.L. 105-285. Recipients of CSBG are committed to meeting the requirements of the established CSBG Organizational Standards as outlined by the Department of Health and Human Services, Office of Community Services in Information Memo 138 of 2015. The Organizational Standards are organized in three thematic groups comprising nine categories and totals of 58 standards for private, nonprofit entities and 50 for public entities. The purpose of the organizational standards is to ensure that all agencies have appropriate organizational capacity, in both critical financial and administrative areas, as well as areas of unique importance to the mission of the Community Action network.

The listed organizational standards strengthen accountability and results of our programs. These standards are meant to ensure that Community Action Agency fulfills the mission of CSBG as outlined in the CSBG Reauthorization Act with regards to Maximum Feasible Participation. Customer satisfaction, quality improvement, **strategic planning**, and the **community assessment** are all activities in which CAA encourages the participation of low-income individuals/families.

Standard 1.2: The organization analyzes information collected directly from low-income individuals as part of the Community Assessment. Data can be collected through a variety of ways including, but not limited to, focus groups, interviews, community forums, customer surveys, etc. Documentation that this standard is being met includes data summaries, review of low-income data in the with notation in the appendix of the assessment, community forum summaries, interview transcripts.

Standard 2.2: The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process. These sectors would include at minimum: community-based organizations, Ofaith-based organizations, private sector, public sector, and educational institutions. Documentation is needed to demonstrate that all five sectors have been engaged: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions. CCA prefers that survey data is used for this portion of the assessment but focus groups can also be utilized.

Standard 2.3: The organization communicates its activities and its results to the community.

Standard 3.2: As part of the community assessment, the organization collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).

Standard 3.3: The organization collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment. This will be documented in the analysis section of the assessment.

Standard 3.4: The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed. Conditions of poverty may include items such as: numbers of homeless, free and reduced school lunch statistics, SNAP participation rates, etc. Causes of poverty may include items such as: lack of living wage jobs, lack of affordable housing, low education attainment rates, etc. This will be documented through analysis section of the assessment.

Scope of Services

As envisioned, the scope of service for this proposal(s) will include the following components.

Please note that consultants are not limited to the components presented here and proposers are encouraged to expand on the suggested components and the approach they would take to refine the Strategic Plan and Community Needs Assessment.

At a minimum, the following items should be included as components of the Community Assessment:

- Conditions of poverty: key findings and analysis
- Causes of poverty: key findings and analysis
- Demographic make-up of potentially eligible families including their number, geographic location, and racial/ethnic composition.
- Data specific to poverty and its prevalence related to gender, age, and race/ethnicity for service area. (Organizational Standard 3.2)
- Data on poverty and prevalence, comparisons, trends, and current (gender, age, race/ethnicity)
- Qualitative and quantitative data: from all geographic service areas, trends, and comparisons. (Organizational Standard 3.3)
- Customer satisfaction data
- Participation and information from low-income individuals
- Input gathered from key sectors (at least community organizations, faith groups, private sector, public sector and education).
- Other social service agencies in the geographic area and the constituents they serve.
- Data regarding the health, nutrition, and social service needs of the communities as defined by community institutions.
- Availability and accessibility of community resources that can address the needs of eligible families.
- Key findings on the causes and conditions of poverty and the needs of the communities assessed. (Organizational Standard 3.4)
- Community member narratives (This is a best practice from the Community Action Partnership).
- Community profiles for each locality
- Key findings section to the final report
- Available resources at agency and in the community assets
- Relationship of CAA's activities to other anti-poverty services
- Data analysis and identification of areas of greatest community needs
- Level of needs and changes over time
- Gaps at family, agency and community level

Project Coordination

Community Action Agency expects the Consultant to coordinate with CAA's assigned staff throughout the course of the project. Regular meetings 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.

Public Process

The planning process is as consequential as the final product. CAA desires a process that is inclusive of our mission, values, and principles. The consideration and involvement of key community stakeholders in the process is critical to its success.

Needs Assessment

This component may include but is not limited to the following tasks:

- Review of existing Needs Assessment and documents pertinent to strategic planning.
- Assessment of the values, strengths, weaknesses and competencies of CAA.
- Identification of any fellow service providers and assessment of their capabilities to compete with CAA in delivering services.

Program Inventory and Analysis

Inventory existing program offerings and partnerships to serve as a baseline to identify service gaps and opportunities for different delivery options, partnerships and collaborations.

Identification of Opportunities, Strategies and Vision.

Refining the vision for CAA which identifies its priorities, opportunities and strategies and clarifies CAA's role and confirm its mission and values.

Strategic Planning Document and Executive Summary

Preparation of final plan document for review and presentation of plan to the CAA Board

Optional Components that can be part of Strategic Planning include the following:

- Financial Plan
- Implementation Plan
- Performance Measures

Evaluation of Proposals

The following tentative schedule for evaluation of the proposals is planned.

Proposals Received Through	September 1, 2021 by 4:00 pm
Selection Committee Review Week of	Week of September 7, 2021
Selection of top proposals for Interview	Week of September 21, 2021
Notification	October 1, 2021

- A committee will be assembled to review and evaluate the submitted proposals. The committee will rank proposals based on the criteria stated below.
- Experience and expertise of the proposer(s) particularly in strategic planning and/or evaluation of demographic data.
- Experience of the Project Manager in planning and in gathering statistical characteristics of populations served.
- Relevancy of similar work experience.
- Management approach to the project and philosophy towards strategic planning.
- Understanding of the scope of the project and a logical methodology for carrying out the tasks in the scope of work.
- Demonstrated ability to lead, facilitate and coordinate project involving extensive community participation.
- Cost for the work to be completed.
- Availability of firm's personnel for meetings.

CAA reserves the right to reject any and all proposals received as a result of this RFP. Community Action Agency is under no obligation to award a contract as a result of this RFP.

Proposal Submission

- Proposals should be word processed in a 12-point font and in 8 ½" by 11" format. Proposals should not include any unnecessary promotional material. The following information is required from each company/organization submitting a proposal.
- Cover letter including: Legal name of the consultant firm, address, phone, fax and email address, year the firm was established and type of business.

- An organization chart indicating roles of all individuals and company/organization involved in this project. Please, include brief resumes for each individual identifying their qualifications and experience.
- A brief statement of the consultant's philosophy toward planning and inclusion of diverse socioeconomic groups for Community Action and the company/organization approach to be used in this project.
- Qualifications, related experience and references.
- Management approach to the work.
- Proposed scope of work and plan to accomplish the work.
- Schedule or timeline for project.
- Fee schedule and proposed fee to accomplish the work.

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Community Action Agency
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Community Action Agency will consider proposal for both the needs assessment and strategic planning or for one of the aforementioned.

Any Proposal submitted in response to this request shall be irrevocable for a period of 45 days from the due date of the Proposal and may not be withdrawn by any Vendor during such period. After such period of 45 days, the Proposal may be withdrawn by a Vendor at such Vendor's request if such Vendor's Proposal has not been selected prior to any such request to withdraw.

Proposals received after 4:00 pm on September 1, 2021 by 4:00 pm will not be accepted.