

## Community Action Agency of Southern New Mexico Request for Proposals – Strategic Planning Services

### 1. Introduction

Community Action Agency of Southern New Mexico (CAASNМ) is seeking proposals from Consultants/Firms for the development of a comprehensive Strategic Plan that includes an Action Plan and Community Needs Assessment. CAASNМ anticipates that the planning process will take six to nine months. The outcome of the process will be a written, strategic plan document that incorporates the planning process, research, analysis, and strategies that will guide CAASNМ for the next five years.

CAASNМ encourages that any inquiries be submitted by email to CAASNМ at: **dawnh@caasnm.org**. All inquiries will receive a response and the inquiry and response shall be posted on the New Mexico Association of Community Partners website at: <https://nmcap.wordpress.com/>

Consultants/Firms will be selected for this project based on criteria stated in Section 4. Only proposals submitted by the deadline date will be considered. The proposals are due by close of business (5:00 p.m.) on Wednesday, November 29, 2017.

CAASNМ may request interviews with the top two Consultants/Firms before making a final decision.

#### **RFP Process**

One (1) Consultant/Firm may be selected, although CAASNМ is under no obligation to award a contract because of the selection process. Based on the proposals received, the selection committee will select Consultants/Firms to be interviewed. As a result of those interviews, the top-rated Consultant/Firm may be selected for contract negotiations.

### 2. Background

CAASNМ has been working nearly five decades to lift Southern New Mexicans out of poverty through high-impact programs that build self-reliance. Our mission is building self-reliance for low-income New Mexicans by connecting our community to high-impact programs that encourage family wellness, empower families and bridge resources. One of the agency's strengths is its ability to offer an innovative and unique scope of services to help people out of poverty. Last year, we reached over 8,500 families and 28,000 individuals.

#### Vision

Our vision is to create a community where opportunity exists for all to become self-sufficient.

CAASNМ administers more than \$3 million in grant and program funding to provide a variety of services in five southwestern counties of New Mexico: Dona Ana, Hidalgo, Sierra, Luna, and Grant, with limited services in other southern NM counties and statewide.

### **Child and Adult Care Food Program (CACFP)**

CACFP strives to improve the health and eating habits of participants enrolled in family day care and adult care homes and centers. The program offers reimbursement to the provider of these services for meals served.

Healthy Kids Healthy Childcare (HKHCC) initiative is a statewide partnership to train licensed childcare centers and to give them an action plan to promote healthy eating, physical activity, reduced screen time (time that children spend in front of a television screen or PC monitor), water availability, and breastfeeding resources.

### **Community Services Block Grant (CSBG) Program**

CSBG offers rent/mortgage, utility and prescription payment assistance. Funding is provided for past due bills if the applicant meets the income guidelines and provides the required documentation.

**Free computer literacy classes** allow clients to receive hands-on technical training so that they can learn basic computer skills.

**Financial Literacy** classes are presented to clients to learn about the importance of saving. Financial literacy is vital to our work helping clients build self-reliance. Through these financial literacy classes, clients are taught how to budget and stretch their dollar. The goal of these classes is that clients will be able to rely less on outside assistance.

**Individual development accounts (IDAs)** are currently offered to high school juniors and seniors to get a head start on saving money towards achieving higher education goals. IDA clients are matched 4:1 for contributions into their account, up to \$1000 of their savings, for an end total of \$5000.

**Children's Savings Accounts** CAASNМ offers savings accounts to eligible children to save for their future.

**Total Benefits Services** connects clients to services by pre-screening them for benefits, including: SNAP, access to health insurance through Medicaid, utility assistance and cash assistance.

## **3. Scope of Work**

As envisioned, the nature of the work shall, at a minimum, consist of: (A) project coordination; (B) organizational assessment; (C) organizational planning; (D) community needs assessment for five southwestern New Mexico counties; (E) development of a 3-5 year strategic plan document including an implementation/action plan; and (F) a final report with presentations to staff and the Board of Directors. Please note that consultants are not limited to the components presented here. Proposers are encouraged to expand on the suggested components and the approach they would take to refine the Strategic Plan. The scope of work for this proposal will include the following components:

### **A. Project Coordination**

The awardee will be expected to develop a timeline and coordinate with the CAASNМ's strategic planning committee throughout the course of the project. Regular meetings and status reports are expected to keep the project on schedule.

## **B. Organizational Assessment and Preparation**

CAASNМ desires a process that is inclusive and collaborative. The involvement of key community stakeholders in the process is critical to its success. The awardee will be responsible for reviewing necessary organizational documents, meeting and interviewing key staff and board members, coordinating a board/leadership retreat, and conducting internal evaluations of the organization that include an assessment of immediate issues to be addressed and SWOT and/or gap analyses.

## **C. Organizational Planning**

The awardee will be expected to assist in refining the vision for the CAASNМ which identifies its priorities and opportunities and clarifies the CAASNМ's role, mission and values. The work will also include engaging agency board, staff and community partners/stakeholders in the development of short and long-term agency goals, objectives, strategies, and providing outcomes that can be measured to assess the ongoing effect of the established goals and objectives.

### *Strategic Process*

The strategic process will include planning, facilitating, and evaluating a Planning Retreat with the board of directors and staff to:

- Review and revise, as necessary vision and mission statements
- Develop short and long-term goals and objectives based on the Community Needs Assessments and SWOT analyses
- Develop key strategies
- Develop key indicators and a set of outcomes that can serve as the basis for performance measures based on the Results Oriented Management and Accountability (ROMA) model. <http://www.nascsp.org/CSBG/594/ROMA.aspx?iHt=23>. Most performance measures will be tied to the National Performance Indicators as required by the National Association for State Community Services Programs. <http://www.nascsp.org/CSBG-Data-Collection-and-Reporting/957/CSBG-Annual-Report>.

The location, cost and event planning of the retreat will be coordinated through CAASNМ.

## **D. Community Needs Assessment**

Conduct a five (5) county needs assessment for Sierra, Luna, Dona Ana, Hidalgo, and Grant counties. Example of past assessment can be found at <https://caasnm.files.wordpress.com/2013/12/community-needs-assessment-final.pdf>

## **E. Strategic Plan Document**

The awardee will be responsible for preparing the final strategic plan document for review and presentation to the CAASNМ board and staff. In addition to including elements identified in the Community Needs Assessment and developed during the organizational planning phase, the strategic plan will also include an implementation/action plan with a defined implementation timeline that ensures the identified strategies become an active and integrated part of the agency's operations and the projected outcomes are measured and evaluated.

## **F. Final Report**

For documentation purposes, the awardee will be responsible for providing CAASNМ with a final report that includes all items listed in section 3 of this RFP and all documents prepared in execution of Scope of Work (i.e. timelines, meeting agendas, handouts, sign-in sheets, pictures of flipcharts created, the final strategic plan document, etc.).

CAASNМ will receive a draft Strategic Plan for review, corrections and revisions, with the final Plan to follow within a period not to exceed 30 days from the final date of the retreat. It will be required that both the draft and the final plan be submitted in printed and electronic Microsoft Word format.

## **4. Proposal Submission**

Proposals should be word processed in a clear, concise, 8 ½" by 11" format. Proposals should not include any unnecessary promotional material. The following information is required from each Firm submitting a proposal.

**a.** Cover letter

**b.** Legal name of the Consultant/Firm, address, phone, and email address, year the Firm was established and type of business.

**c.** An organization chart indicating roles of all individuals and Firms involved in this project. Include brief resumes for each individual identifying their qualifications and experience.

**d.** A brief statement of the Consultant's philosophy toward strategic planning for community action and the Firm's approach to be used in this project.

**e.** Management approach to the work.

**h.** Proposed scope of work and plan to accomplish the work.

**i.** Schedule or timeline for project.

**j.** Fee schedule and proposed fee to accomplish the work. Itemize all costs required to accomplish the work by task. To itemize salaries, indicate each project team member's name and title, estimated number of hours to be worked by each, the hourly wage for each, and each employee's total salary for the work. Hourly wages submitted shall remain in effect until project completion. If the estimated number of hours worked is exceeded, CAASNМ bears no responsibility to compensate for those hours.

**One (1) original proposal and six (6) copies are to be submitted to:**

Community Action Agency of Southern New Mexico  
Attention: Dawn Z. Hommer  
3880 Foothills Rd. Ste A  
Las Cruces, NM 88011  
E-mail: dawnh@caasnm.org

**Proposals must be received no later than 5:00 p.m. on November 29, 2017.**

Proposals received after that date will not be accepted.

## 5. Evaluation of Proposals

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

### A. ANTICIPATED TIMELINE

Proposal Deadline:	November 29, 2017
Selection of top two for Interviews	Week of December 4, 2017
Consultants Notified of Outcome	Week of December 4, 2017
Consultants Interviewed	Week of December 11, 2017
Contract Negotiations (May change and is based on State and Board Approval)	Week of December 18, 2017
Anticipated Award Date:	Week of January 8, 2018
Work Begins and Ends	TBD

## 6. Contract Requirements

The Consultant/Firm selected is required to agree to the terms contained below.

### A. Indemnification and Insurance Requirements

#### Indemnification

The Contractor agrees to indemnify, defend and hold harmless CAASNМ and its authorized officers, employees, agents and volunteers from any and all claims, actions, losses, damages, and/or liability arising out of this Contract from any cause whatsoever, including the acts, errors or omissions of any person and for any costs or expenses incurred by CAASNМ on account of any claim therefore, except where such indemnification is prohibited by law.

#### Insurance

Without in any way affecting the indemnity herein provided and in addition thereto, the Contractor shall secure and maintain throughout the Contract the following types of insurance with limits as shown:

#### 1. Workers' Compensation

Employer's Liability with \$250,000 limits, covering all persons providing services on behalf of the Contractor and all risks to such persons under this Agreement.

#### 2. Comprehensive General and Automobile Liability Insurance

This coverage to include automobile liability for owned, hired and non-owned vehicles.

#### 3. Errors and Omissions Liability Insurance or Professional liability insurance

Covers claims that arise from negligent acts or failure to provide the level of advice or service that was expected.

### B. Inaccuracies or Misrepresentations

If in the course of this procurement or in the administration of a resulting contract, CAASNМ determines that the vendor has made a material misstatement or misrepresentation or that materially inaccurate information has been provided to CAASNМ, the Proposer may be terminated from the procurement process or in the event a contract has been awarded, the contract may be immediately terminated.

## 7. Selection Process

The Strategic Planning Committee will be assembled to review and evaluate the submitted proposals. The committee will rank proposals based on the criteria stated below.

- Experience successfully completing similar projects especially with other Community Action Agencies 20 Points
  - Facilitation Experience 20 Points
  - The proposal indicates a clear understanding of the project and is appropriate to the charge 20 Points
  - The Work Plan addresses the entire Scope of Work, with timely benchmarks for results 20 Points
  - The budget is appropriate to plan needs 20 Points
- TOTAL: 100 Points

CAASNMs Chief Executive Officer (CEO) will approve the selection of the awardee(s). The CEO may request presentations by or meetings with any or all applicants, to clarify or negotiate modifications to the applicants' proposals prior to final selection. The CEO may negotiate any portion of the work plan and/or budget as necessary and at CAASNMs discretion.

CAASNMs reserves the right to reject any and all proposals received as a result of this RFP.

CAASNMs is under no obligation to award a contract as a result of this RFP.

Final Authority

The final authority to award contract rests solely with the CAASNMs Board of Directors.

## 8. Acceptance of Terms and Conditions

Submission of a proposal shall constitute acknowledgement and acceptance of all the terms and conditions contained in this RFP, unless otherwise specified in the proposal.

## 9. Payment

Payment to the awardee(s) will be made as follows: CAASNMs will pay within 30 days of receipt of acceptable invoices. Payment is contingent upon fulfillment of deliverables. Invoices should reflect actual services provided and actual reimbursable expenses incurred.

Itemize all costs required to accomplish the work by task. To itemize salaries, indicate each project team member's name and title, estimated number of hours to be worked by each, the hourly wage for each, and each employee's total salary for the work. Hourly wages submitted shall remain in effect until project completion. If the estimated number of hours worked is exceeded, CAASNMs bears no responsibility to compensate for those hours.

Final payment will be made after submission of the Final Report. **CAASNMs will not reimburse costs that exceed the contract amount total.**