



**Project Amistad
REQUEST FOR PROPOSAL
2022 – 2026 Strategic Plan
RFP No. ADM03242021**

Mission Statement: To advocate, connect and deliver social services to communities ensuring a dignified and meaningful life for all.

Project Amistad (PA), a 501(c)(3) nonprofit agency, was established in 1976 to provide transportation and social services to elderly persons, persons with disabilities, persons at-risk and persons in need within El Paso County. Volunteers from the League of United Latin American Citizens (LULAC) organization provided services as part of their social service programs. Through word of mouth, the services provided by the volunteer organization grew such that there was a need to establish a formal structure to coordinate transportation services and to meet the growing needs of providing social services (food & clothing drives, housing needs, transportation, financial support when possible, and advocacy).

PA is seeking Requests for Proposal (RFP) from entities with extensive experience in providing consultation services towards the development of a Strategic Plan. The goal of this project is to develop the agency's 2022-2026 Strategic Plan. The 2017-2021 Strategic Plan was designed to begin the strategic planning process for the agency. This work led to the development of the agency's Vision, Mission Statement, and Values and identified priorities needing to be addressed by the agency. Additionally, a "Quality Assurance Plan" (QAP) was developed and incorporated into the Strategic Plan.

During the evaluation process, PA reserves the right, where it may serve in PA's best interest, to request additional information or clarification from prospective consultants, or to allow corrections of errors or omissions. Throughout this procurement process, facts and requests for information may warrant PA to make amendments to this RFP. Should this occur, all known respondents will be notified in writing. PA will retain all submittals for future reference.

PA will receive written and sealed competitive bids until 5:00 P.M. MST, April 22, 2021, addressed to Andrea Ramirez, Chief Executive Officer, 3210 Dyer, El Paso, TX 79930. Any proposal received after the date and hour specified will be rejected and returned unopened to the offeror. Each proposal and supporting documentation must be in a sealed envelope or container plainly labeled in the lower left-hand corner: "RFP ADM03242021 2022-2026 Strategic Plan" with the closing date and time.

Upon consideration of the submittals, PA reserves the right to accept or to reject any and all submittals, to waive technicalities, and to make any investigation deemed necessary concerning the submitter's qualifications to provide the services covered by the specifications, and to accept what in PA's sole judgement is the most qualified submitter.

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I. Introduction

A. Request for Proposal (RFP)

Project Amistad (PA), a 501(c)(3) nonprofit agency, was established in 1976 to provide transportation and social services to elderly persons, persons with disabilities, persons at-risk and persons in need within El Paso County. Volunteers provided services from the League of United Latin American Citizens (LULAC) organization as part of their social service programs. Through word of mouth, the services provided by the volunteer organization grew such that there was a need to establish a formal structure to coordinate transportation services and to meet the growing needs of providing social services (food & clothing drives, housing needs, transportation, financial support when possible, and advocacy).

B. Term of Engagement

The contract will be effective until the Strategic Plan is implemented in 2022. This contract must remain in effect until the expiration date, performance of services ordered, or termination by either party with a 30-day written notice. Such written notice must state the reason for cancellation. PA does not guarantee any specific amount of compensation, volume, minimum, or maximum number of services under this proposal and resulting contract.

II. Scope of Work

A. Description of Scope of Work

PA is seeking Requests for Proposal (RFP) from entities with extensive experience in providing consultation services towards the development of a Strategic Plan. The goal of this project is to develop the agency's 2022-2026 Strategic Plan. The 2017-2021 Strategic Plan was designed to begin the strategic planning process for the agency. This work led to the development of the agency's Vision, Mission Statement, and Values and identified priorities needing to be addressed by the agency. Additionally, a "Quality Assurance Plan" (QAP) was developed and incorporated into the Strategic Plan.

The successful bidder will:

- Guide the Board of Directors (BOD) to develop the Strategic Plan.
- Facilitate the BOD's working sessions resulting in a Strategic Plan for 2022-2026.
- Work with the agency's management staff and establish working sessions as deemed necessary.
- Complete a written plan for submission to the BOD for their approval in late 2021.

III. Project Overview

The consultant will meet with the Strategic Planning Committee (board members and management staff) and guide them through the process resulting in the completion and approval of the 2022-2026 Strategic Plan. Two working sessions will be held which could range from

three to four hours each. The committee and consultant will report to the BOD at the designated meeting dates. Management staff will provide ongoing support throughout the process.

The consultant will have an initial planning session with management staff to review the data and documentation to be used as a starting point. Prospective bidders interested in submitting a formal proposal, should respond to this inquiry and schedule a session with management staff that will respond to questions and provide copies of current materials to be used throughout the process. Sessions with prospective bidders will be structured such that the same information will be presented to all bidders. As a condition of receiving such information, your expression of interest in proceeding shall be deemed to constitute your agreement to protect, preserve and maintain all such information strictly confidential.

IV. Calendar Dates

The following is a tentative timeline for the completion of the 2022-2026 Strategic Plan. Dates are subject to change.

1. February 2021
 - Development of RFP.
2. March 2021
 - Appointment of Planning Committee by BOD
 - Review tentative schedule.
 - March 24, 2021 – RFP released
3. April 2021
 - April 16, 2021 – Respondents asked to submit questions ahead of time to allow management to have prepared responses. Q&As submitted are shared with all firms.
 - April 19, 2021 – Respondent questions and answers are shared with all firms.
 - April 22, 2021 – RFP Due by 5pm MST
 - April 26, 2021 Evaluate proposals and select respondent(s) for interview sessions
4. May 2021
 - Selected respondent(s) present
 - May 19, 2021-Strategic Planning Committee Members present their top choice to the BOD for approval
 - Schedule planning sessions with the consultant
 - Schedule and conduct working sessions with the consultant and working sessions with the board committee and the agency's management staff.
 - Mail surveys to obtain community feedback about Amistad.
5. June 2021 – July 2021
 - Working session with BOD, consultant, and management staff
 - Follow up work groups.
 - Review community assessments
6. August 2021 – September 2021
 - Working session with board of directors, consultant, and management staff
 - Follow up work groups.
 - Review preliminary 2022-2026 Strategic Plan.
7. November 17, 2021 (Wednesday 3:30 PM)
 - 2022–2026 Strategic Plan presented to the Board of Directors for approval

V. Submission requirements

The RFP is to be organized according to the following outline to achieve a uniform review process and obtain the maximum degree of comparability. The response must be single-spaced, 12 pt. Times New Roman font, 15-page limit. One original response, three copies, and one electronic copy on a USB drive of the proposal must be submitted by the due date and time (refer to page 1 of the RFP).

A. Title page

Contain the following: the RFP subject, the name of the proposing consultant and contact information and the date of submission.

B. Table of Contents

Include a clear identification of the material by section and by page number.

C. Company Background & Experience

1. Briefly introduce your company, providing a summary of the administration, organization and staffing of your company, including multiple office locations, if applicable.
2. Provide an organizational chart indicating the positions and names of the core management team which will undertake this engagement.
3. Include resumes for each person to be assigned. Include any professional designations and affiliations, certifications, and licenses, etc.
4. Describe the experience of the company in the last 36 months in providing consulting services in a similar scope.
5. Describe any relationships with your existing clients that might jeopardize your objectivity or independence.
6. Disclose any potential conflict(s) of interest that may exist with PA's management staff and BOD.
7. Other projects currently underway by the bidder.
8. One marketing type brochure can be included which does not count as part of the 15 pages.

D. Pricing

1. Documentation as to costs to PA for completion of this project (as well as a payment schedule), and provide supporting detail demonstrating that all costs are reasonable and necessary (include breakdown as to the various types of expenses to be charged (personnel; mailing; supplies; other).
2. The consultant will be an independent contractor (not an employee of PA) and will not receive any employment benefits normally offered to agency employees.

E. References & Other

1. Provide references for similarly successful projects from five clients, including the name of the company, contact name, telephone, fax, and email address. Please include references that will be responsive if they were to be contacted.

2. Provide marketing materials, flyers, annual report, and other information deemed necessary.
3. List any added values above and beyond contracted services that your company will provide.
4. List your company's commitment to Corporate Social Responsibility within the community.
5. While not the sole determining factor, special consideration will be given to Historically Underutilized Businesses (HUB) or Disadvantaged Business Enterprises (DBE) as defined by the State of Texas HUB / DBE Program. If your company is a HUB / DBE, be sure to include the HUB / DBE Certification Number as businesses are encouraged to respond to this bid request.
6. PA expects the respondent to be in compliance with Title VII of the Civil Right Act and with EEOC Laws and Regulation and prohibits discrimination in employment based on race, color, religion, sex, gender, gender expression, gender identity, genetic information, national origin, age, ancestry, creed, and denial of family and medical care leave, disability (mental and physical), marital status, medical condition, and sexual orientation.

The respondent must include this paragraph and state that the company complies.

VI. Evaluation Criteria

1. All proposals will be evaluated by an evaluation committee and will include PA's Board of Directors and Corporate Management Team.
2. Respondents to this RFP may be required to submit additional information that PA may deem necessary to further evaluate the offeror's proposal.
3. The committee will select the top two companies and will schedule an interview session.

All research and materials created, developed, compiled, or produced pursuant to or as a result of this project (including but not limited to all reports) will be considered ordered and commissioned by PA as works made for hire under the copyright laws, and made in the course of services rendered. If, for any reason, the proposed research, and materials to be provided are not considered works made for hire under the copyright laws, then the applicant will be required to assign all right, title and interest in and to such research and materials to PA.

Any submissions to PA shall become the property of the agency (not including any intellectual property rights contained in such submission), and the agency is not required to return any submitted materials to any applicant. By submitting a proposal, each applicant grants the agency the right to duplicate, use, disclose, and distribute all of the materials submitted for evaluation, review, and research to board members and management level staff. In addition, each applicant guarantees that the applicant has full and complete rights to all of the information and materials included in the proposal. Each applicant also guarantees that all such materials are not defamatory and do not infringe upon or violate the privacy rights, copyrights, or other proprietary rights of any third party.

The successful bidder will be required to sign a binding agreement. Until both parties have signed an agreement, no express or implied commitment has been made to provide financial support. Applicants are

not authorized to commence work until the agreement is fully executed. If applicants opt to commence work, they do so at their own risk. No oral or written statement other than the signed, written agreement will govern or modify the relationship.

PA will have complete rights to the reports created for this project and they will be the sole property of the agency. The final report to the Board of Directors will include the 2022-2026 Strategic Plan, a final invoice, and a summary with recommendations deemed valuable as the agency moves towards implementing said Plan.

Respond to this inquiry by 5:00 pm, MST April 22, 2021. Applicants selected to be interviewed by a committee of the BOD and management staff will be notified shortly thereafter, and interviews will follow. Submitting an initial bid does not guarantee that the bidder will be invited to an interview. The selected consultant will be invited to attend the BOD meeting on Wednesday, May 19, 2021 at 3:30 PM.

Respondents are asked to submit questions ahead of time to allow management to have prepared responses. Q&A's submitted are shared with all firms. Questions are due by April 16, 2021. Respondent questions and answers will be shared with all firms by April 19, 2021.

Please submit questions to:

Andrea Ramirez, CEO, aramirez@projectamistad.org and copy Chanah Schwartz, Executive Assistant to the CEO, cschwartz@projectamistad.org.