



**LEGAL SERVICES CORPORATION**

**REQUEST FOR PROPOSALS  
FOR STRATEGIC PLANNING CONSULTANT**

***Open: November 5, 2015 – December 16, 2015***

## INTRODUCTION

The Legal Services Corporation (LSC) is seeking proposals from qualified consultants to assist LSC in evaluating and updating its current strategic plan for an additional four-year period. LSC is looking for a consultant or consulting firm that can offer the most advantageous balance of price, quality, and performance to LSC for the consulting services requested. The consultant will be expected to conduct interviews and develop surveys and webinars for a diverse audience in order to evaluate the goals articulated in LSC's 2012-2016 Strategic Plan and determine whether those goals should be maintained or expanded moving forward. The successful candidate will also be expected to collate the deliverables into a comprehensive report that will inform the 2017-2020 Strategic Plan, which will be presented to LSC's Board of Directors during the April 2016 Board Meeting. The successful candidate will not be expected to draft the 2017-2020 Strategic Plan.

## ABOUT LEGAL SERVICES CORPORATION

LSC is a federally established and funded grant making organization that supports civil legal aid providers across the country. Its mission is to expand access to justice by *funding* high-quality, free attorneys for low-income Americans in basic civil matters like divorce, child custody, and eviction. It does not provide direct legal services itself.

LSC is headed by a bipartisan board of directors, whose 11 members are appointed by the President of the United States and confirmed by the United States Senate. Much like federal agencies, LSC receives an annual appropriation and is subject to ongoing congressional oversight. But as a private nonprofit, it enjoys greater independence and flexibility than its federal counterparts. For example, LSC has initiated a large-scale fundraising campaign in conjunction with its 40th anniversary observation.

LSC promotes equal access to justice by awarding grants to independent legal aid providers through a competitive grants process. LSC distributes almost 95 percent of its total funding in grants. LSC currently has 134 grantees with more than 800 offices in every county in the United States, the District of Columbia, the Commonwealth of Puerto Rico, the U.S. Virgin Islands, Guam, and Micronesia.

LSC performs robust oversight of its grantees, conducting audits and on-site visits to evaluate grantee quality and compliance with statutory and regulatory requirements and various funding restrictions. LSC also provides training and technical assistance to grantees. LSC encourages its grantees to leverage limited resources by partnering and collaborating with other funders of civil legal aid, including state and local governments, Interest on Lawyers' Trust Accounts programs, state access to justice commissions, the private bar, philanthropic foundations, law schools, and the business community.

LSC grantees are administered by local governing bodies, which are statutorily required to be comprised of mostly attorneys and client-eligible members. The legal services provided by grantees differ based on the unique and pressing needs of the respective communities served. The most common practice areas, however, are family, housing, income maintenance,

consumer, health, and employment law. The types of cases frequently encountered by LSC grantees include evictions, debt collection, foreclosures, divorces, child custody, spousal abuse, child abuse or neglect, access to health care, and benefit claims such as unemployment, disability, food stamps and public assistance.

### **RFP OVERVIEW**

For the past 15 years, LSC has actively engaged in strategic planning for the organization with the primary goal of advancing LSC's mission: *To promote equal access to justice in our Nation and to provide high quality civil legal assistance to low-income persons.* In 2000, LSC's Board of Directors first adopted a Strategic Directions plan for the period 2000-2005. In 2006, the Board adopted Strategic Decisions 2006-2010. In 2011, LSC undertook a more comprehensive strategic planning process and developed the current 2012-2016 Strategic Plan, which set three primary goals: (1) to maximize the availability, quality, and effectiveness of the civil legal services that its grantees provide to eligible low-income individuals; (2) to become a leading voice for civil legal services for poor Americans; and (3) to achieve the highest standards of fiscal responsibility both for itself and its grantees. Each of these planning documents is located in LSC's FOIA Public Reading Room at: <http://www.lsc.gov/about-lsc/foia/foia-electronic-public-reading-room>.

LSC now seeks the services of a consultant who will work with LSC to solicit feedback on and evaluate the 2012-2016 Strategic Plan in order to guide LSC's Board of Directors in updating that Plan for the period 2017-2020. As is described in more detail in the *Duties, Tasks, Milestones, and Deliverables* section below, the successful candidate will work closely with LSC's senior management and Board of Directors to conduct interviews and develop surveys and webinars for a diverse audience including LSC's staff and Board of Directors, grantees and their client-eligible board members, external stakeholders, and Congress, in order to evaluate the 2012-2016 goals and determine whether those goals should be maintained or expanded moving forward. The successful candidate will also be expected to collate the deliverables into a comprehensive report that will inform the 2017-2020 Strategic Plan, which will be presented to the Board during LSC's April 2016 Board Meeting.

### **DUTIES, TASKS, MILESTONES, AND DELIVERABLES**

Using the following assumptions, the successful consultant will be expected to perform the following duties and tasks and complete the following milestones and deliverables during the project term:

#### ***Duties and Tasks***

The successful candidate will be expected to work closely with LSC's strategic planning team, comprised of LSC senior management and Board Members, to solicit feedback, evaluate, and update the 2012-2016 Strategic Plan by performing the following tasks:

**1. Kick-Off Meeting**

The strategic planning consultant will meet with LSC's strategic planning team in Washington, D.C. to discuss the parties' roles and responsibilities in the strategic planning process. LSC will provide the consultant with relevant information from prior strategic planning processes and the parties will discuss the best means for executing the project deliverables.

**2. Create and Conduct Anonymous Surveys**

The strategic planning consultant will work with LSC's senior management and Board to create and conduct several different types of surveys that can elicit comparable responses from a variety of sources, including LSC's staff, grantees, board members of grantees, external stakeholders and funders, and select Congressional staff. The goal of these surveys is to assess whether LSC's current goals should continue to inform LSC's 2017-2020 strategic vision and what, if any, new goals should be articulated.

**3. Conduct Board of Director and Board Committee Member Interviews**

The strategic planning consultant will conduct telephonic interviews of LSC's Board of Directors and Board Committee Members to evaluate the current goals articulated in the 2012-2016 Strategic Plan and to discuss the Board's vision for LSC. Additional information on LSC's Board and Committees can be found at: <http://www.lsc.gov/about-lsc/board-members>.

**4. Conduct Interviews of Client-Eligible Board Members of Grantees**

With assistance from LSC's senior management, the strategic planning consultant will identify and interview client-eligible board members of LSC's grantees with geographical and case type diversity to identify their needs from LSC and to determine how LSC's current goals address those needs in order to inform LSC's 2017-2020 strategic vision. The interviews should solicit feedback from client-eligible board members of grantees, both in their capacity as board members and as proxies for the clients their organizations serve. To learn more about our grantees' clients, please see client success stories at: <http://www.lsc.gov/what-legal-aid/client-success-stories>.

**5. Conduct Interviews and Follow-Up Calls with Congressional Staff**

In connection with the Congressional staff survey described in Task 2 above, the strategic planning consultant will conduct follow-up calls to Congressional staff that have not responded to the survey. The consultant will also interview interested Congressional staff.

**6. Draft and Facilitate Up To 3-4 Webinars**

The strategic planning consultant will work with LSC's senior management to develop and facilitate 3-4 webinars with interested stakeholders and partner organizations in order to solicit feedback on whether LSC's current goals should continue to inform LSC's 2017-2020 strategic vision and what, if any, new goals should be articulated.

## **7. Final Compilation and Report**

At the conclusion of the survey, interview, and webinar period, the strategic planning consultant will compile and analyze the information obtained during the strategic planning process. The consultant will provide a written report with its analysis and recommendations for the 2017-2020 Strategic Plan, as well as the compilation of survey responses, interview summaries, and webinar results. The consultant will not be expected to draft the 2017-2020 Strategic Plan, the final report and compilation it provides should be sufficiently comprehensive to guide LSC in drafting the Plan.

## **8. Attend Periodic Meetings**

LSC expects that the strategic planning consultant will be available for periodic meetings, including the Kick-Off Meeting, and conference calls throughout the planning process. If needed, the selected consultant should also be available to attend LSC's Board Meetings in Washington, D.C. (April 17-19, 2016) and Burlington, Vermont (July 17-19, 2016).

## **9. Weekly Status Updates**

The strategic planning consultant will provide weekly status updates via email to a designated LSC member throughout the planning process, as well as be available by phone, as needed.

### ***Milestones***

The strategic planning consultant will perform the work described in *Duties and Tasks* as follows:

<b>DUE DATE</b>	<b>DELIVERABLE</b>
January 8, 2016	Initial Kick-Off Meeting completed
January 26, 2016	Present draft surveys, interview questions and webinar presentations to LSC for review
February 1, 2016	Send surveys to LSC staff, grantees, client-eligible board members of grantees, select funders, and select Congressional Staff
February 1 – 29, 2016	Conduct interviews of Board of Directors and Board Committee Members, client-eligible board members of grantees, and, if needed, Congressional staff
February 15-19, 2016	Facilitate Webinars
March 1 – 22, 2016	Compile and analyze results of surveys, interviews, and webinar
March 25, 2016	Interim Report and Recommendations to LSC due
March 31, 2016	Final Report and Recommendations to LSC due

***Project Management***

**1. Dedicated Team**

The successful candidate will have dedicated staff assigned to the project, including a primary point of contact for the duration of the engagement.

**2. Location of Performance**

Candidates will be available at times to meet with LSC's senior management and Board of Directors onsite in Washington, D.C. and may also be expected to travel to LSC's Board Meetings in Washington, D.C. and Burlington, Vermont, April 17-19 and July 17-19, respectively. The consultant is not required to perform the tasks described above onsite at LSC.

***Estimated Contract Term and Schedule***

LSC estimates that its strategic planning process will take ten months to complete. The consultant will perform the majority of the tasks described in the RFP over the course of four months between January and April, 2016, but should remain available to consult with LSC throughout the strategic planning process.

**CONSULTANT QUALIFICATIONS**

The successful candidate will have demonstrated experience creating and conducting surveys, interviews, and other steps necessary for strategic planning for nonprofit organizations. The candidate should be adept at tailoring surveys and interview questions to a variety of audiences, while simultaneously creating a cohesive plan to ensure that all work elicits information capable of comparison. Knowledge of the legal services community is not a requirement, but is highly desirable. LSC expects this engagement to be a team process and seeks candidates that are willing to work collaboratively to achieve LSC's goals. Candidate should provide at least three (3) references in their bids.

**RFP SCHEDULE**

<b>DATE</b>	<b>EVENT</b>
November 5, 2015	RFP issued
November 13, 2015	Deadline for respondents to submit RFP questions
November 17, 2015	LSC responds to RFP questions
December 16, 2015	Deadline for respondents to submit proposals
December 17-19, 2015	Evaluation of proposals
December 19, 2015	Notification to successful consultant of preliminary selection and contract negotiation
December 23, 2015	Contract approval
January 6, 2016	Performance begins

## PROPOSAL SUBMISSION REQUIREMENTS

All proposals must be 15 pages or less (exclusive of cover letter, table of contents, biographies, sample work product), well-organized, and demonstrate how the consultant's proposed services, approach and methodology, qualifications, experience, and terms meet or exceed LSC's requirements. Candidates should include the following information in their proposals:

### ***Consultant Information***

1. Full name, address, telephone number, contact person, email, and website.
2. Consultant overview, including a brief history, number of employees, and number of years in operation.
3. RFP point-person. Please include title, phone number, and email address.
4. Your experience in working with a grant-making organization like LSC to update and revise a strategic plan.
5. Your opinion on five critical factors that contribute to successful strategic planning.
6. Your experience evaluating, updating and revising strategic plans versus conducting the process from the ground-up.
7. Your unique capabilities/experiences that your firm would bring to the process.
8. Samples of surveys, questionnaires, and webinars that you have developed in the past.
9. Your experience facilitating webinars.
10. Your experience working with the legal services community.
11. A breakdown of the types of organizations that you have worked with in the past (e.g., non-profits, funders, government, commercial) and the type of work provided.
12. Examples of your experience soliciting feedback from high-level individuals, such as members of Congress.
13. Three (3) references.

### ***Pricing and Pricing Methodology***

Pricing must be itemized and include a written explanation of all fees and cost, including travel costs to Washington, D.C. for the Kick-Off Meeting and Board Meeting, and Burlington, Vermont for the Board Meeting. LSC is a 501(c)(3) tax exempt organization.

### ***Product Staffing***

Provide resumes and/or biographies for staff members who will be assisting LSC purchase, install, use, and maintain the product (i.e. the sales, customer service, maintenance and repair, and technical assistance staff).

### ***Other Information***

You may provide other information or material that you believe is relevant to our evaluation or that provides additional features or value to LSC.

### RFP RELATED QUESTIONS

Please submit questions relating to this RFP by email to Helen Gerostathos Guyton at [guytonh@lsc.gov](mailto:guytonh@lsc.gov), with a Cc: to Rebecca Fertig Cohen at [cohenr@lsc.gov](mailto:cohenr@lsc.gov), **no later than 5:30 pm EST, on November 13, 2015**. Answers to questions will be shared with all RFP respondents and posted to <http://www.lsc.gov/rfp-strategic-planning-consultant>.

### PROPOSAL DEADLINES AND MODE OF DELIVERY

Proposals must be in electronic form (PDF or Microsoft Word), and received **on or before 5:30 p.m., Eastern Time, December 16, 2015**. Please email your proposal to:

Helen Gerostathos Guyton  
Contracts Coordinator  
Legal Services Corporation  
3333 K St. NW, 3rd Floor  
Washington, DC 20007  
202.295.1632  
[guytonh@lsc.gov](mailto:guytonh@lsc.gov)

You are solely responsible for ensuring that your proposal is delivered on time. Late proposals may be accepted in LSC's sole discretion. You must bear all costs incurred in preparing your proposal; contract awards will not cover proposal costs.

### PROPOSAL EVALUATION CRITERIA

The contract will be awarded to the consultant who provides the **best value** – the most advantageous balance of price, quality, and performance – to LSC. Proposals will be evaluated based on the following criteria:

- ✓ **Quality**
  - Qualifications and experience of consultant and proposed staff
  - Technical expertise
  - Delivery schedule
  - Project plan and approach
- ✓ **Performance**
  - Timeliness of deliverables
  - Capacity
  - Understanding of and ability to meet LSC's needs
  - Responsiveness to LSC
  - Professionalism of representatives



- ✓ **Price**
  - The reasonableness of the price for the service being provided.
  - Whether the price is realistic (especially if it is an estimate), reflects a clear understanding of LSC's need, and is consistent with other parts of the proposal.
  - Cost by labor category (if a times and materials contract).
  - The cost of incidental expenses, including taxes and service fees, administrative costs, travel and transportation costs.
- ✓ **Demonstrated reputation for excellence in price, performance, and quality**
- ✓ **Willingness to accept LSC's terms**

### **LSC'S RIGHTS**

LSC reserves the right to:

- Accept or reject any or all proposals, or any part thereof;
- Waive any informalities or technicalities contained in any proposal received;
- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any respondents on any or all aspects of its proposals;
- Cancel or re-issue this RFP at any time;
- Retain all proposals submitted in response to this RFP;
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion;

### **CONFIDENTIALITY**

During the RFP process, you may be given access to LSC's confidential or proprietary information. You agree not to use this information for your or any third-party's benefit, and will not disclose this information to any person who does not have a need to know.

### **FREEDOM OF INFORMATION ACT**

The Freedom of Information Act (FOIA) and associated LSC regulations may require LSC to disclose certain documents to the public, including portions of your proposal. Generally, LSC will not release any documents that would cause your consultant competitive harm. You are encouraged, however, to label any confidential information contained in your proposal to facilitate LSC's ability to withhold it from disclosure.