



## **Request for Proposal Strategic Planning**

**Deadline for Submission: December 15, 2022**

### **PURPOSE:**

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead Connecticut Legal Rights Project, Inc. (CLRP), Board of Directors and staff through a long-range strategic planning process.

The goal of this plan is to identify specific measures and outcomes for the next five years, identify the governance and operation structure that will ensure CLRP success in achieving these outcomes, develop a plan for financial diversity and stability to sustain organizational growth, and provide strategies to ensure that CLRP's work and impact is centered in addressing racial equity both internally and externally.

Specifically, CLRP is seeking a consultant to provide the following services:

- Work with a Strategic Planning Team, comprised of Board Members, The Executive Director, as well as key staff, to articulate a clear plan for CLRP for 2023-2028. This plan should identify specific measurable outcomes, governance structure, organizational structure, fundraising goals and opportunities, grant making, internal and external communication plan, and programming objectives for the organization all while centering anti-racism and equity.
- Conduct a small scope internal and external survey to evaluate CLRP's success in achieving its goals outlined in its logic model and current priority statement and conduct a general analysis using SWOT (strengths, weaknesses, opportunities, threats), NOISE (needs, opportunities, improvements, strengths, expectations), or another validated method, of internal and external perceptions of the organization.
- Develop a timetable of implementation with specific measurable benchmarks, objectives and tasks to be accomplished to achieve goals. Identify clear, measurable outcomes for how to measure organizational and strategic effectiveness, impact, and success.
- Establish a framework and process for the organization's leadership to effectively implement the strategic plan and monitor progress toward achievement of goals and objectives.
- Facilitate all meetings and provide leadership, direction and expert consultation and advice related to the development of an effective strategic plan, including successful implementation.
- Deliverable should be a clear, easily consumed, strategic planning roadmap, accompanied by a strategic

planning timeline, implementation and evaluation methodology.

- Ensure that the plan takes an intersectional and anti-racist approach that includes current and potential clients, staff, partner organizations, friends, donors, grantors, and other relevant stakeholders as identified by CLRP.

### **BACKGROUND INFORMATION:**

CLRP provides high quality legal services to low income persons with psychiatric disabilities living in Connecticut, primarily on matters related to their treatment and civil rights.

One of CLRP's most important goals is to empower people with psychiatric and other labels by increasing their own ability to influence the decision-making processes that, to a large extent, control their lives.

CLRP is a non-profit Connecticut corporation with its principal place of business in Middletown. It is governed by a Board of Directors which meets on a quarterly basis.

The Executive Director of CLRP is hired by the Board of Directors and has full responsibility, both fiscal and administrative, for running the Project, hiring/firing staff, and entering into contracts on behalf of CLRP.

In addition to the Executive Director (who is an attorney), CLRP's staff includes a Legal Director, Business Manager, staff attorneys, paralegals, Operations Coordinator and Operations Assistants/Screeners.

Advocacy staff spend substantial time at satellite offices in mental health facilities throughout the state.

### **MISSION:**

Connecticut Legal Rights Project, Inc., (CLRP) is a statewide non-profit agency which provides legal services to low income individuals with mental health conditions, who reside in hospitals or the community, on matters related to their treatment, recovery, and civil rights.

CLRP represents clients in accordance with their expressed preferences in administrative, judicial, and legislative venues to enforce their legal rights and assure that personal choices are respected and individual self-determination is protected.

CLRP develops and supports initiatives to promote full community integration which maximizes opportunities for independence and self-sufficiency.

### **MANAGEMENT ISSUES TO BE ADDRESSED/SCOPE OF WORK:**

CLRP is at a critical point in its organizational development, having completed a working draft of a logic model to explain our theory of change. We found that process, and the roadmap it created, to be a productive way to focus the board and staff on the tangible needs of the organization but have realized that our current way of doing the work may need to be changed as staff turns over. We also need to figure out how to preserve effectively the institutional knowledge of people who have worked at CLRP for decades, and bring new people on board so that the work can continue.

## **CURRENT OPPORTUNITES AND CHALLENGES:**

CLRP would like to build off the success of our planning processes to date and create a vision of our north star, including policy goals, number and scope of legal services and fund raising goals. We are committed to becoming an anti-racist organization; our work combating systemic barriers for our clients, many of whom present with intersectional identities, requires us employ an anti-racist, intersectional, and equity lens in our work.

CLRP staff is currently stable, but we anticipate continued change and turnover as people contemplate retirement. The current staffing level is not sufficient to address both day-to-day needs of our clients and the litigation work that is necessary to change the systems in which our clients live.

We expect that this process will mainly involve the staff and Board of the organization but want to include input from key stakeholders of the organization, including potential clients.

## **THE CHALLENGES FOR THIS PLAN INCLUDE:**

This plan will be focused on the strategic plan that will support continued accomplishment of the organization's mission as it undergoes a period of change driven by resources and retirements. We would also like to re-commit to our mission and values and re-focus our priorities, and a pathway to support the work, that infuses anti-racism into our mission and values.

In developing the 2023-2028 plan, the applicant selected for this project will be expected to: guide the organization in establishing its Strategic Planning Team, conduct interviews and facilitate all working sessions with the Team and other key Board and staff members, and perform a SWOT or NOISE analysis. Based on the analysis, specific goals will be identified and, ultimately, the consultant will develop a final strategic plan that reflects our commitment to continuing the work our clients need as we work towards becoming an anti-racist organization, and provides CLRP with clear objectives and action steps that lead to achieving organizational goals. The strategic plan will also include information on effectively monitoring progress and how and when the agency should reassess goals, objectives and action steps to make sure that they are still relevant and reflect environmental changes that may impact CLRP's ability to implement the plan and recommendations.

Specific areas that need to be addressed in the creation of a 3-5 year strategic plan include but may not be limited to:

- An environmental scan that examines internal and external opportunities and perceptions impacting the organization's ability to achieve its mission.
- A thorough assessment of infrastructure needs including, but not limited to space, technology, human capital and financial resources.
- The development of a sustainable financial and programmatic model to achieve goals.

The proposal will provide an executive summary of the work that will be performed by the consultant and a detailed work breakdown structure, with timeframes, of the steps that will be taken to develop a strategic plan.

## **GLOBAL PROJECT REQUIREMENTS & TIMELINE:**

1. CLRP is seeking proposals from applicants who capable of addressing all of the above stated management issues and who can provide additional expertise to help the organization and the community it serves achieve a successful project outcome.
2. Successful applicants would implement an intersectional and anti-racist approach to the process.
3. While CLRP understands that completing this project requires significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing all project work products and final deliverables (e.g. writing organizational assessments, writing the actual strategic plan, etc.). The staff will not be expected to be involved in writing work project products or final project deliverables.
4. Applicants are to propose which aspects of the project will require Board and/or staff involvement and include the expected time requirements for all activities involving their participation.
5. Proposals must include a clear description of the applicant's plan to complete all of the project components (i.e. in what order will the projects be completed, how long each component will take to complete, etc.), a proposed budget, and expectations regarding payments upon completion of each component of the plan.
6. Applicants must include in their project timelines "check-in" points for CLRP to be provided with project status updates. As work products/deliverables are completed prior to the established check-in points, applicants will be required to send CLRP these materials to facilitate the status update meetings and/or conference calls. The successful applicant will be responsible for setting up the check-in meetings/calls, preparing an agenda for each meeting/ call, sending out meeting invites and writing meeting minutes.
7. In addition to the check-in meetings and/or conference calls, the applicant will be expected to present a status update on her/his preliminary findings and recommendations prior to writing the final project deliverables and strategic plan.
8. CLRP will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected will provide the agency with ongoing coaching and implementation support as needed, per letter of agreement.

## **EVALUATION CRITERIA:**

In awarding a contract for consulting services to develop a long-range strategic plan for the organization, CLRP will examine a number of factors and criteria will include:

1. The extent to which the proposal addresses the stated management issues and clearly describes the scope of work
2. Specific plans or methodology to be used to perform the services
3. Qualifications and experience of consultant in providing strategic planning development

4. Availability for work to be conducted during early 2023, with strategic plan draft presented to the CLRP board no later than at their October 2023 board meeting.

#### **APPLICATION PROCESS & PROCEDURES:**

Please provide a complete written response to this RFP which is double-spaced and does not exceed 15 single-sided pages. Proposals should include:

1. A brief Executive Summary.
2. A description of the applicant's general approach to strategic planning consultation, including methodology, perspective, or philosophy that guides your work with organizations in this undertaking.
3. Experience, if any, with legal services organizations, CLRP's client population, and/or taking an anti-racist approach to strategic planning.
4. A clear explanation of how the consultant will address the management issues to be examined at CLRP and approach to ensuring the approach and plan encompasses anti-racism, intersectionality, and equity.
5. A list of project deliverables to be created with a detailed timeline for each deliverable and overall project completion.
6. Credentials and qualifications of key personnel who will take responsibility for working directly on this project, including three references.
7. Example(s) of a finished strategic plan created by your company.

Applicants must submit an electronic copy of the proposal. Please note that CLRP will not return any proposals it receives and will not reimburse applicants for any costs they incur in developing their proposals.

Send completed proposals, by **December 15, 2022**, to Kathy Flaherty, Executive Director of CLRP at [kflaherty@clrp.org](mailto:kflaherty@clrp.org).