



Request for Proposals: Strategic Planning Consultant

Introduction

Appalachian Research and Defense Fund of Kentucky, Inc. (AppalReD Legal Aid) seeks an experienced Strategic Planning Consultant to guide and execute a comprehensive strategic planning process. AppalReD Legal Aid has been providing high quality civil legal services to the low-income and vulnerable in its 37-county service area in eastern and south-central Kentucky for over 50 years. These services are supported by funding from the Legal Services Corporation, the Commonwealth of Kentucky, and other government and private sources. These services include housing, domestic violence, family, consumer protection, health, public benefits, expungement, disaster legal assistance, and elder law. AppalReD Legal Aid has five offices and approximately 60 staff. AppalReD Legal Aid serves about 10,000 people a year. For more information about AppalReD Legal Aid, please visit our website www.ardfky.org.

AppalReD Legal Aid's most recent strategic plan was from 2020-2022. AppalReD Legal Aid extended the plan through 2023 and fulfilled nearly all of the goals we set. We now seek to lay the foundation of our future with the next plan. Our goals are to develop a strategic plan that will guide our efforts to enhance service delivery, sustain or increase funding, and strengthen our impact over the next five years.

AppalReD Legal Aid is characterized by a period of transition and growth. There is a new leadership team. The organization's budget increased by Three Million Dollars over the past five years. Additionally, AppalReD Legal Aid has multiple new projects and funding sources, including Project Renew, which serves low-income individuals impacted by substance use disorder, and legal services for flood survivors of the catastrophic July 2022 flood that impacted 15 counties of the service region.

Significantly, this plan will be the first post-pandemic plan where the lessons we learned working and practicing law in virtual or remote environments will inform how we continue to meet our communities' needs in the future. In advance of strategic planning, AppalReD Legal Aid completed a Regional Needs Assessment focused on the legal needs of low-income people in our service area. Additionally, the staff and board engaged in a values workshop to define our organization values. Both documents will anchor and inform our next strategic plan.

The consultant's role is critical in shaping our future. The strategic planning process is intended to achieve the following:

- **Develop short and long term goals for the organization, including metrics and benchmarks for evaluating progress and success**
- **Examine our current organizational structure and determine how to successfully integrate special projects and response teams within the structure**
- **Assess best use and direction of resources in response to the recent legal needs assessment**
- **Target systemic advocacy aligned with the legal needs assessment.**
- **Ensure Necessary Resource Development to Sustain a Growing Program.**

Proposal Contents

Consultant proposals should include the following:

- A detailed approach to conducting the strategic planning process including the work to be performed, estimated hours, and other relevant information
- Development of a plan to monitor and evaluate the implementation of the strategic plan
- A budget estimate for the entire project
- A statement of prior experience with facilitating strategic planning for non-profit organizations. Experience working with and knowledge of legal services organizations is preferred

Project Budget

AppalReD Legal Aid seeks proposals with budgets up to \$35,000.

Project Timeline/Due Dates

A. RFP Release Date	June 20, 2024
B. Proposals Due to AppalReD Legal Aid	July 19, 2024
C. Notice of Award Released (on or before)	August 2, 2024
D. Draft Assessment Submitted to AppalReD Legal Aid	January 15, 2025

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| E. Final Assessment Submitted to AppalReD Legal Aid | March 1, 2025 |
| F. Consultant Presentation to AppalReD Legal Aid Board of Directors | April 2025 |

Selection Criteria

In awarding a contract for services to facilitate our strategic planning process, AppalReD Legal Aid will examine several factors and criteria including:

- The extent to which the consultant’s response describes its methodology and addresses the organization’s intentions in its narrative;
- The specific plans to be used to perform the services;
- Qualifications and experience facilitating strategic plans for nonprofit organizations, including legal services organizations; and
- Total cost for providing services.

RFP respondents may be asked to revise their proposal based on further negotiations. This document represents an initial request for proposals only and in no way should be construed as a contract or letter of intent.

Confidentiality

Unless otherwise required by law, all information disclosed by AppalReD Legal Aid during the proposal process shall be considered confidential and should not be released to outside parties.

Likewise, all proposals from RFP respondents will only be reviewed by AppalReD Legal Aid staff and/or Board as necessary for the fair selection of the contractor and will not be shared with outside parties, unless otherwise required by law.

Project Deliverables

All recommendations identified during this engagement will be documented and reviewed with AppalReD Legal Aid management. All deliverables produced during the engagement are for the sole use of AppalReD Legal Aid and will remain the property of AppalReD Legal Aid.

Supplementary Information

RFP respondents may find it useful to review the following links and documents before submitting a proposal:

1. [AppalReD Legal Aid Regional Needs Assessment April 2024](#)

2. [AppalReD Legal Aid Core Values](#)
3. [AppalReD Legal Aid Strategic Plan 2020-2022](#)

Questions may be directed to Angeleigh Dorsey, Executive Director, via email (angied@ardfky.org).

Submission Information

Please submit proposals via email to Angeleigh Dorsey (angied@ardfky.org) with the subject line "Strategic Planning RFP." Applications will be accepted until Friday, July 19, 2024.