



Casa Youth Shelter

Strategic Visioning and Planning

Request for Proposals

March 6, 2019

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Tentative Timeline

March 6, 2019	Release Request for Proposals
March 18-21, 2019	Voluntary Shelter Tours (subject to request)
March 22, 2019	Bidder Inquiry / Question Deadline
April 3, 2019	Proposal deadline: Six (6) bound and one (1) unbound copies of the proposal shall be submitted not later than 4:00 PM Submit to: Kathleen Cyr, Administrative Manager Casa Youth Shelter 10911 Reagan Street Los Alamitos, CA 90720
April 10-12, 2019	Selected Consultant Interviews with Strategic Planning Committee
April 16, 2019	Consultant Recommendation Presented for Board of Directors Consideration
May 1, 2019	Consultant Contract Executed
May 21, 2019	Introductory Presentation and Strategic Visioning with the Board of Directors
May – August 2019	Research, Needs Assessment and Documentation (Subject to Consultant's proposal and capacity, this activity may be accelerated.)
September 13, 2019	Draft Strategic Plan Submitted to Strategic Planning Committee
October 22, 2019	Board of Directors Review of Final Draft Strategic Plan
November 19, 2019	Completed Strategic Plan Provided for Board of Directors Adoption

The Casa Youth Shelter Board of Directors reserves the right to modify this timeline to facilitate the acquisition of a Strategic Planning Consultant and/or complete this scope of work.

Background

Building on the vision of our founder Myldred Jones, Casa Youth Shelter (CYS) works with families to provide safe shelter, counseling, outreach, and support services to more than 200 children, ages 12-17, and their families each year. With 12 beds, children are provided temporary shelter, assistance and, as needed, referral to continued support services. CYS is also a California licensed Group Home and provides provide housing to foster youth through age 18. CYS is located at: 10911 Reagan Street in Los Alamitos, Orange County, California.

Our Current Vision and Mission are identified below:

Our Vision

A community where all adolescents in crisis have a safe space to stay in an environment that promotes healthy family relationships.

Our Mission

Provide temporary shelter for runaways and youth in crisis, enabling them to come through the crisis with increased personal strength and a sense of renewal while in a supportive environment, with family reunification as a primary goal.

CYS maintains an annual budget in excess of \$1,200,000. Funding is provided through various fundraising activities and a federal grant. Current information on CYS programs and services may be obtained at www.casayouthshelter.org.

Anchored in our exemplary clinical and shelter program, the CYS Board and administration understand that current programs and services require reflection and consideration in light of the changing needs of youth in crisis, to make the most of opportunities to better serve the needs of our service population. Additionally, since June 2017, CYS has retained a new Executive Director, celebrated its 40th anniversary, and acquired a neighboring property that will significantly increase the footprint of the existing shelter.

Purpose

The Casa Youth Shelter Board seeks a professionally-qualified consultant to work directly with its Strategic Planning Committee, and a broad array of community stakeholders, to create a three- to five-year strategic plan ("Plan") through a comprehensive, data-driven, and participatory planning process. The Plan shall serve to identify strategic priorities to guide the development of the Shelter's programs and services, and the work of the Board, to ensure it is meeting the evolving needs of youth, within the context of its mission statement and anticipated resources, while optimizing overall Shelter operations.

Scope

The consultant shall, at minimum, accomplish the following:

Planning Activity and Final Deliverable

1. Design and execute a strategic visioning and comprehensive planning process.
2. Develop an actionable three- to five-year strategic plan, including a projected budget for its implementation.

3. Develop and present recommendations for Plan implementation and support structure.
4. Produce a print ready, summary plan document for reproduction by Casa Youth Shelter (models may be found at: <http://lnfy.org/wp-content/uploads/2018/06/LNFY-Strategic-Plan-2018-21.pdf> and [https://www.covenanthousetoronto.ca/homeless-youth/Page/Files/2312_FINAL%20-%20CovenantHouse StratPlan Handout 2018 print.pdf](https://www.covenanthousetoronto.ca/homeless-youth/Page/Files/2312_FINAL%20-%20CovenantHouse%20StratPlan%20Handout%202018%20print.pdf)).

Research

It is anticipated that these tasks will be accomplished through a combination of activities, such as:

- Literature review, interviews, survey development and analysis, and/or any other research method that will be useful in receiving stakeholder and community input to define best practices and effective youth support and intervention methods;
- Facilitated group meetings with stakeholders to create consensus regarding a strategic vision and strategic plan (including goals, objectives, strategies, and tactics); and
- Presentation, review, and discussion of youth services-related data and analysis, stakeholder plans, and best-practices with the Strategic Planning Committee to provide input and direction in the development of the Plan.

Strategic Plan Development

The Board seeks the consultant's proposal and recommendations to guide an effective and efficient process for the development and documentation of an actionable strategic plan. The Board and the Strategic Planning Committee envision a scope of work that includes, but is not limited to, the following elements:

1) Consensus Building – Vision and Key Goals Development with Leadership and Stakeholders

Develop and lead a process that includes consensus building among the shelter's leadership and stakeholder partners to:

- a) Create and affirm a ***shared strategic vision*** that:
 - builds on Casa Youth Shelter's existing mission statement
 - is clearly stated
 - is compelling
 - is timely
 - describes a clear and present need
 - motivates people to act
 - is audacious
- b) Identify ***six to ten achievable goals*** that are key to supporting the vision.

2) Research – Needs Assessment, Gaps Analysis, SWOT Analysis, Related Research, etc.

Support and facilitate the data-driven efforts of the Shelter's technical coordinator, whose role will be to identify, research, and analyze information that will enable the Board and its stakeholders to better understand the status of youth in crisis, an array of efforts the Shelter may conduct to address issues associated with this population, and opportunities for enhancing the Shelter's services. Key factors to understand during this stage include, but are not limited to:

- The current status of youth in crisis in the communities the Shelter serves (in total, stratified by population, stratified by geography, etc.)
- Local and regional resources available to address issues related to youth in crisis (i.e., an inventory)
 - What is working?
 - What changes are necessary (e.g., programs, cultural changes, etc.)?
 - What don't we know? What else do we want to know?
- Gaps in programs and services to address needs of youth in crisis
- Opportunities and approaches for Casa Youth Shelter to fill programs and/or service gaps (e.g., coordination of programs, implementation of programs, etc.)

This research should produce the substantive data-driven documentation and findings to inform the strategic planning process. In cooperation with the Shelter's technical coordinator, responsibilities include: facilitation of the process for information collection; documentation of data and findings; and analysis and presentation of data, findings, and recommendations in a complete and timely manner to inform strategic plan development.

3) Documentation – Memorialize Findings and Write the Strategic Plan

Based on consensus building and research work products, develop and document an actionable strategic plan to serve as the blueprint for the Shelter's continued organizational development and work with youth in crisis. The Plan should include:

- An Executive Summary
- A comprehensive, detailed plan that identifies:
 - Shared Vision
 - Goals
 - Objectives
 - Strategies
 - Tactics
 - Responsible Partners and their Roles
 - Measures
 - Outcomes

This Plan should *also* include:

- A financial summary identifying budgetary requirements to support the Plan
- Resource development strategies
- Initial communications strategies (What are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)

4) Recommendations – Implementation of the Strategic Plan

Develop recommendations to support successful implementation of the proposed Strategic Plan. Recommendations shall include, but not be limited to:

- A detailed time-phased budget plan
- Launch event
- Infrastructure needed to support implementation of the Plan
- Leadership and Working Committees structure needed to act on the Plan
- Performance tracking and evaluation metrics

Consultant Qualifications

To accomplish the scope of work requested, the Consultant will need to possess and demonstrate the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledge of collective impact or collaborative strategic initiatives
- Strong facilitation skills with diverse audiences
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Knowledge of social services and approaches to supporting youth in crisis, ages 12-23
- Experience at gathering and utilizing data to inform and complete the strategic planning process
- Knowledge of budgeting
- Knowledge of marketing, communications, and branding
- Knowledge of resource development

Proposal Elements

Proposals must include the following:

General Information

Casa Youth Shelter's Board of Directors understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in scope activities. Further, if a consultant group or partnership of consultants is proposed, the proposal should indicate who will serve as the lead person for the purposes of this RFP and the engagement.

Consultant Qualifications and Roles

The proposal must describe the consultant's qualifications to conduct the RFP scope of work activities, including expertise, knowledge, and experience. Experience should include examples of conducting similar or related work (i.e., working with other collaborative or collective impact initiatives to create a strategic vision and strategic plan).

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct as well as information about their level of expertise, knowledge, and experience to conduct those specific activities.

Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:

- A detailed narrative of key activities to be conducted and work products produced;
- A timeline of key activities, progress milestones, and deliverables;
- Disclosure of individuals, including external contractors, responsible for achievement of key activities, progress milestones, and deliverables; and
- A proposed fee schedule, including proposed progress payments and reimbursable expenses, tied to identified project milestones and/or deliverables.

References

The proposal should include three references of individuals who can speak to their experience with the bidder's performance on projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address.

Previous Work Product

The proposal should include examples of the bidder's written work produced to address a similar scope of work as requested within this RFP (e.g., strategic planning).

Proposal Submission

Six (6) bound and one (1) unbound copies of the proposal shall be submitted to: Kathleen Cyr, Administrative Manager, Casa Youth Shelter, 10911 Reagan Street, Los Alamitos, CA 90720, not later than 4:00 PM on April 3, 2019.

Inquiries and Point of Contact

For the purpose of providing clarifying information concerning this RFP, all potential bidders are encouraged to submit questions in writing to: Kathleen Cyr, Administrative Manager at Casa Youth Shelter, via email at: kcyr@casayouthshelter.org, by 4:00 p.m. on March 22, 2019. Responses to questions submitted will be provided to all bidders of record as a supplement to this RFP.

Additionally, upon request, potential bidders may be provided a tour of CYS facilities during the period of March 18-21, 2019. To request a tour, please contact Kathleen Cyr via email at: kcyr@casayouthshelter.org.

Consultant Selection Criteria

Proposal Evaluation

Consultant selection will be based on the consultant's written proposal, interview, and the results of reference checks. The proposals will be reviewed and evaluated based on the following criteria:

- Qualifications and Experience (30 Points)
- Proposal Scope and Depth (25 Points)
- Work Plan Description and Quality (25 Points)
- Proposal Cost and Overall Value (20 Points)

Reference Evaluation

Information from references will be evaluated as unsatisfactory, satisfactory and exemplary.

Interview Evaluation

Bidders identified to be highly responsive to this RFP will be asked to participate in an interview to further evaluate their fit and capacity for this project. Consultant interviews will be scheduled to take place April 10-12, 2019.