



Request for Proposals (RFP)

Casa Latina Strategic Planning Process for Board of Directors, Staff and Stakeholders *Seattle, Washington*

1. Overview

Casa Latina is seeking a qualified consultant or firm to lead the Board of Directors through the first part of a comprehensive strategic planning process in Spanish and English. The goal is to lay the initial groundwork to develop a clear and actionable strategic plan in 2025 that aligns with Casa Latina's mission, values, and long-term objectives. The process should engage staff and key stakeholders, assess current organizational strengths and challenges, and outline strategic priorities for Phase 3 & 4. The first phase of the process will begin in early October and conclude by January 30, 2025.

2. About Casa Latina

Casa Latina is a Seattle-based nonprofit dedicated to empowering Latino immigrants through employment, education, and community organizing. Our programs include job placement services, leadership development, English language education, and advocacy for workers' rights. With the changing landscape in immigrant services and the community we serve, we are looking to refresh our strategic priorities and strengthen our impact over the next five years.

3. Scope of Work

The selected consultant or firm will work closely with the Board of Directors and senior leadership to facilitate phase 1 & 2 of the strategic planning process. This includes:

- **Phase 1: Discovery & Research**
 - Conduct a review of Casa Latina's mission, vision, and core values.
 - Analyze Casa Latina's strengths, weaknesses, opportunities, and threats (SWOT analysis).
 - Engage key stakeholders in outreach and through interviews, surveys, and focus groups, including board members, staff, clients, and community partners.
- **Phase 2: Strategic Planning Workshops**
 - Facilitate at least two strategic planning workshops with the Board of Directors to establish strategic priorities.
 - Lead discussions with members, community partners and staff in Spanish and English on Casa Latina's long-term goals, organizational capacity, and financial sustainability.

- Facilitate consensus-building on key objectives and outcomes for the next 3-5 years.
- Facilitate a 1 day workshop in Spanish with Board, Staff and Members in mid November, tentatively scheduled for November 13th.
- **Phase 3: Draft Strategic Plan (For 2025)**
 - Synthesize information from the discovery phase and workshops into a draft strategic plan.
 - Present the draft to the Board for feedback and revisions.
- **Phase 4: Final Strategic Plan & Implementation Roadmap (for 2025)**
 - Finalize the strategic plan with actionable goals and timelines.
 - Develop an implementation roadmap, including responsibilities, resources, and metrics for success.
 - Present the final plan to the Board for approval.

4. Timeline

The strategic planning process is expected to begin in **early October 2024** and conclude by **January 30, 2025**. Below is a tentative timeline:

Milestone	Tentative Target Completion Date
RFP released	September 2024
Proposal submission deadline	October 20, 2024
Consultant selection	October 24, 2024
Kickoff meeting with Board & leadership	November 4, 2024
Discovery phase: interviews, surveys, etc.	November 4 th – November 21, 2024
Strategic planning workshops	November 22 – December 13, 2024
Draft strategic plan presented	January 20, 2025
Feedback and revisions	January 25, 2025
Final strategic plan presented	January 30, 2025

5. Proposal Submission Requirements

Interested consultants or firms should submit a proposal that includes the following:

- **Cover letter** introducing your firm and expressing interest in this project.
- **Qualifications and experience** in facilitating strategic planning processes for nonprofit organizations, particularly those serving immigrant or worker rights organizations. We are looking for someone who has experience leading a strategic planning process in a bilingual format, with a diverse constituency group and with prior experience working with nonprofit organizations and boards of directors.
- **Proposed methodology** outlining your approach to engaging stakeholders and facilitating the strategic planning process.
- **Proposed timeline** confirming your availability and ability to meet the deadlines outlined.

- **Budget** including a breakdown of costs for phase 1 & 2 of the project. The budget is \$50,000 for the project (November -January) and should include expenses related to logistics and in person convenings for meetings and events related to the development of the plan.
- **References** from at least three similar projects completed in the last five years.

6. Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Demonstrated experience with strategic planning in nonprofit settings
- Demonstrated experience with bilingual facilitation in Spanish and English
- Understanding of Casa Latina's mission and goals
- Quality and clarity of the proposed methodology
- Ability to meet the project timeline
- Budget and cost-effectiveness
- References and past performance

7. Submission Process

Proposals should be submitted via email in PDF format to **marisa@casa-latina.org** no later than **5:00 PM (PST) on October 20, 2024**. Late submissions will be considered on a case by case basis.

8. Contact Information

For any questions or clarifications regarding this RFP, please contact:

Dr. Marisa Herrera, Interim Co-Executive Director
Casa Latina
marisa@casa-latina.org

9. Conclusion

We look forward to receiving your proposals and appreciate your interest in supporting Casa Latina in this important strategic planning process.