REQUEST FOR PROPOSALS
Capacity Building Consultant – Puerto Rico

INTRODUCTION

LISC is issuing this Request for Proposals (RFP) to seek a qualified individual to assist with organizational development consulting in Puerto Rico for local CDFIs, housing nonprofits, and other community-based organizations. The consultant must be based in Puerto Rico and be willing to travel across the island for hands-on capacity building assistance to non-profits working in community development.

DISTRIBUTION & SELECTION TIMELINE

This RFP will be posted on the LISC website (www.lisc.org). The consultant(s) selected for the work will be notified by close of business on July 30, 2023, or earlier. The work is expected to be completed by December 31, 2023.

BACKGROUND

This Request for Proposals (RFP) seeks consultants to supplement LISC’s existing staff capacity to deliver technical assistance under LISC’s Capacity Building Program. LISC considers submissions of qualifications in response to this RFP as they are received. Funds will be awarded, and work conducted in accordance with all applicable funding requirements, including but not limited to those of the Department of Housing and Urban Development and those required by the Federal Funding Accountability and Transparency Act. All services are provided under the supervision of LISC staff. Services may include the delivery of direct TA, on-call (remote) TA, workshops and trainings, and the development of web-based materials, written products, and training courses.

CONSULTING SERVICES NEEDED AND SCOPE OF WORK ELEMENTS

LISC seeks to engage a bilingual consultant based in Puerto Rico to assist in building the capacity of non-profit community development organizations, particularly those working in partnership with other public, private, and non-profit sector partners to address affordable housing, economic mobility, and resiliency needs of local Puerto Rican communities.

Scope of services:

1. Provide technical assistance to community-based organizations in Puerto Rico to build their capacity for strong organizational management and execution of community development projects and programs. Includes delivering TA and guidance related to some if not all of the following:
   - Board governance
   - Financial management
   - Organizational policies and procedures
   - Community connections
   - Executive leadership
   - Human resources and staff development
   - Management information and compliance monitoring systems
   - Preparation for publicly funded projects
   - Connecting organizations around potential partnerships with local government and others
(2) Produce training and tools to support capacity building among non-profit community development organizations in forms that are accessible to organizational leaders. This may include hosting small in-person convenings, holding webinars or producing/translation materials for use by non-profit leaders.

(3) Represent LISC in meetings with community development leaders in the public, private, and non-profit sectors in Puerto Rico with an aim of gathering critical information about the community development landscape and capacity building needs, and to help refine training and technical assistance activities and tools.

Beneficiaries of the consultant’s TA and trainings will include non-profit community development organizations, all of which are eligible for HUD Section 4 support.

CONSULTANT BUDGET AND BILLING

LISC will enter a “deliverables-based” contract with the consultant, meaning that consultant will be paid a flat fee upon satisfactory completion of each deliverable. Consultant may invoice LISC upon completion of each delivery, or if preferable, invoice LISC for all deliverables at once at the end of the contract. LISC has not set a minimum or maximum amount for consultant bids in this RFP. The consultant has discretion to propose their fee for each task in the scope of work, keeping in mind that fees must be reasonable relative to the services performed, and that LISC is a nonprofit organization with obligation to be responsible steward of its federal and private grant funds.

CONSULTANT QUALIFICATIONS

Required qualifications include:

1. Minimum 8 to 10 years of relevant experience providing assistance on organizational development to nonprofit community organizations,
2. Experience planning national meetings, conferences or trainings,
3. Nonprofit industry knowledge and/or experience,
4. Experience designing and developing training related to community development, specifically housing and economic development (with an emphasis on small business development)
5. Strong oral and written communication skills,
6. A bachelor’s degree in a related field,
7. Bilingual in Spanish and English,
8. Resides in Puerto Rico and is able to travel to any of the municipios, as needed.

The following additional qualifications are strongly preferred:

1. Experience working with LISC,
2. Knowledge of and experience working with the state agencies in Puerto Rico,
3. Knowledge of and experience working with HUD programs, and
4. An advanced degree in a related field.

RFP RESPONSE INSTRUCTIONS

Consultants must submit a complete response package that includes the following items in order:

1. Proposal cover page (found at the end of this RFP), with all information completed.
2. A narrative (maximum one page) that describes how the consultant meets the required qualifications and, if applicable, the preferred qualifications.
3. A brief resume and a list of clients worked with during the past five years. (LISC reserves the right, during
the proposal review stage, to request letters if reference from up to three clients with whom the consultant
has worked in the past three years; however, consultant is not required to submit reference letters with their
response to this RFP.)

4. Consultant’s proposed pricing, using the following table of modular tasks.

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<tr>
<th>Task</th>
<th>Fee</th>
<th>Timeline</th>
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| Needs assessment and scope of work for non-profits that are identified as 
  those needing organizational development and capacity building assistance. |
| Perform a light touch needs assessment to familiarize yourself with the needs of the 
  organization. Develop a scope for engagement for the non-profit assisted. Please 
  indicate your per non-profit organization fee in the “fee” box, as well as the total fee for the 
  estimated 5 non-profits assisted. |     |          |
| Provide direct technical assistance to identified non-profit organizations in 
  response to their capacity gaps. Implement the scope of work. Facilitate calls and 
  meetings with the clients and perform follow-up communication as needed. Develop tools, products, checklists, and any other needed resources to assist the non-profit in addressing their needs identified in the assessment. This can include assistance with building budgets, strategic plans, policies and procedures, bylaws, etc. Please indicate your per non-profit organization fee in the “fee” box, as well as the total fee for the estimated 5 non-profits assisted. If applicable, please include all estimated travel costs as part of the fee; consultant will not be reimbursed separately for travel expenses. |     |          |
| Cohort trainings. Schedule and facilitate up to 3 trainings/webinars with the non-
  profits seeking assistance, as needed. Please indicate your fee per training session in the 
  “fee” box, as well as the total fee for the estimated 6 planning calls. |     |          |
| Meetings with stakeholders. Meet with community stakeholders including public 
  entities such as municipio staff and staff of state and federal agencies, as needed. If 
  applicable, please include all estimated travel costs as part of the fee; consultant will not be 
  reimbursed separately for travel expenses. |     |          |

**Notes/Budget Narrative**

(Please use the budget narrative if you need to provide further explanation on your bids for any of the above tasks, please use the space below for your notes.)
LISC will deem as unresponsive and unqualified any responses that do not include all of the above items. Consultants interested in responding to this RFP should email Madeline Fraser Cook, VP Community Building and Resilient Solutions at mfrasercook@lisc.org, if there are any questions.

Proposals are due by email (in Microsoft Word or PDF format), no later than 5:00pm Eastern time on July 31, 2023 to mfrasercook@lisc.org.

EVALUATION REVIEW AND SELECTION PROCESS

LISC’s Capacity Building program staff will evaluate proposals based upon responsiveness to the criteria described above, completion of experience, rate/price, and availability. Selected consultants will be notified by LISC no later than close of business on August 7, 2023.

LISC is committed to working with SBEs, MBEs, and WBEs, and encourages proposals from SBEs, MBEs, and WBEs.

LISC IS AN EQUAL OPPORTUNITY EMPLOYER COMMITTED TO DIVERSITY & INCLUSION
Consultant Response to Puerto Rico Capacity Building RFP

Cover Page

Please complete and return with full package to:

mfrasercook@lisc.org

| Name:       |
| Company Name (if applicable) |
| Street:     |
| City:       | State: | Zip:  |
| Phone:      |
| Email:      |
| Website:    |

Two-three sentence Bio of Consultant and/or Company including length of time as a consultant. Please attach a resume for the consultant and/or the company.