



Advocacy to Legacy

Request for Proposals (RFP)

**Advocacy to Legacy, Inc.
Home Roots Initiative**

Date: March 10, 2025

Submission Deadlines: April 11, 2025, at 2:00 p.m.

Submission Contact & Address:

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Proposals will be accepted in electronic form only.

1. INTRODUCTION

Advocacy to Legacy's Home Roots Initiative ("Initiative") seeks proposals from a single or qualified team of consultants for two projects to support minority small businesses and conduct the following tasks:

1) Address needs of minority small businesses in Bloomfield and the surrounding communities through the following tasks:

- comprehensive targeted community engagement process;
- preparation of a marketing strategy with an implementation process to support the Initiative;
- a community needs assessment for services including generation of data analysis and reporting to support recommended findings

2) Address facility and property needs for the property located at 112-115 Cottage Grove Road, Bloomfield, CT ("Home Roots at Cottage Grove") through the following task:

- conduct a facility/property needs assessment with improvement recommendations

This Initiative funded through a State of Connecticut Department of Community and Economic Development (DECD) Community Investment Fund (CIF) planning grant seeks to engage members of Bloomfield and the surrounding communities to offer insight and input that will ultimately support community members with access to needed services, foster the small business community providers of those services, and strengthen the economic impact and growth of the small business providers while providing a facility that is a “one-stop, easy access” complex.

Strategies and policies will be developed from the outcomes and will be utilized to address economic growth, unique challenges, and opportunities facing individuals within the local communities.

After receiving community input, a needs assessment will be completed. A data analysis and reporting component will then be generated to further define existing community conditions. Consultants will conduct a comprehensive process and ultimately complete an economic development strategies document specifically for minority small businesses in Bloomfield and the surrounding communities.

2. ABOUT THE HOME ROOTS INITIATIVE

Home Roots, based in Bloomfield, Connecticut, is a partnership between the nonprofit Advocacy to Legacy (A2L) and Cottage Grove Circle, located at 112-116 Cottage Grove Road. This partnership was formed to support A2L’s mission of educating and making a positive impact on the people who live in and around Greater Hartford. Cottage Grove Circle was formed with the purpose of providing space to foster small businesses that provide much-needed community services in a “one-stop location” for the local community. These services include life/health/auto insurance, accounting, bookkeeping, driving school, home health aid, holistic behavioral health, home improvements, real estate, West Indian Foundation, Medicare/Medicaid Access HealthCT assistance, sheriff, financial investments and others. The vision is to provide a facility that houses small business service providers, with an emphasis placed on minority-owned businesses. The local area hosts a variety of industries, including manufacturing and insurance, as well as a diverse population base. It boasts a rich cultural mix, with a population reflecting African American, Caribbean, and other ethnic backgrounds. Its proximity to Hartford provides additional economic and cultural opportunities.

3. PURPOSE OF THE RFP

The purpose of this RFP is to solicit and contract with a consultant or team demonstrating the expertise and capacity to implement the tasks outlined in the Introduction. Home Roots is seeking to identify additional services needed, how to raise awareness of, and communicate to the area, that those services and small businesses are available to the community, and to upgrade the facility at 112-116 Cottage Grove Road.

The process will aim to:

- Gather input on service needs, challenges, and aspirations of greater Bloomfield’s minority communities
- Identify opportunities for current and potential service providers aimed at enhancing economic vitality, job creation, and business development
- Provide specific recommendations for providers, policies, and programs to support economic growth and equity
- Develop a marketing plan and strategy to promote the vision of Home Roots, including a budget-conscious communication and marketing plan, social media, building signage, etc.
- Work in conjunction with the Cottage Grove Circle building owner to identify facility renovations and upgrades, and provide cost estimates, and necessary drawings to facilitate a “shovel-ready” plan

The goal of this process is to foster small business growth and development in a facility that can service multiple needs of the community.

Proposers may choose to bid on one or more of the following tasks outlined in the following Scope of Work. The preference would be for a team approach to provide the full scope as outlined.

4. SCOPE OF WORK

The selected consultant(s) will be responsible for the following tasks:

A. Community Engagement Strategy

- Develop and execute a comprehensive community outreach and engagement plan that includes culturally relevant methods to ensure robust participation from the area’s minority population and minority small business community
- Identify key stakeholders and community leaders within the minority groups
- Interview and facilitate a conversation with the current service providers located at 112-116 Cottage Grove to capture information on the synergy that can be created and expanded for the benefit of the Home Roots Initiative and the community
- Use diverse outreach methods, including, but not limited to, public forums, surveys, focus groups, interviews, and social media outreach, to engage and capture a wide range of input
- Facilitate focus groups, community meetings, and individual interviews to discuss barriers, opportunities, and recommendations to promote the mission of the Home Roots Initiative

- Ensure that engagement efforts are accessible, inclusive, and transparent.

B. Data Analysis and Reporting

- Conduct a review of community socio-economic data focused on the minority population to characterize existing conditions and projected trends of relevance.
- Analyze the data collected to identify key themes, trends, and community priorities related to the targeted populations that would utilize the services offered by the Home Roots' small businesses.
- Collect data on minority small businesses' perspectives on key issues such as affordable housing, workforce development, small business support, access to capital, and other factors contributing to economic success. Other issues will be determined as part of the community engagement process and analyzed by the consultant.
- Prepare a report capturing and illustrating findings to be incorporated into the needs assessment.

C. Service Needs Assessment

- Develop a needs assessment based on the information and data collected in the previous tasks to identify services that can be provided by small minority businesses
- Identify opportunities for growth and expansion of current and potential small businesses for the Initiative
- Identify short-term methods to identify services that are lacking, or which can be expanded within the Initiative
- Ensure that the recommendations and methods are accessible, inclusive, and transparent

D. Develop a Marketing Strategy and Implementation Plan to Promote the Home Roots Initiative and the small businesses within the facility

- Assess the current marketing and awareness methods utilized to promote Home Roots
- Develop a multi-faceted marketing plan that addresses the visual awareness of the location (i.e., signage) and the programmatic offerings of the Initiative and its small business offerings
- Ensure that the recommendations and methods are budget-conscious and easily attainable for both the Initiative and the small businesses

E. Conduct a Facility Needs Assessment and Cost Analysis

- Working with the facility ownership, review any current plans and documents relating to the facility located at 112-116 Cottage Grove
- Examine any plans, documents, etc. that have been submitted through the CIF grant request process or with requests associated with the Town of Bloomfield
- Conduct a facility/property needs assessment with improvement recommendations – including interior and exterior buildings and property
- Prepare a cost analysis based on the recommendations and confirm the cost is attainable for the program
- Work with an architect who will prepare construction drawings as needed for the project, including but not limited to, interior/exterior renovations; elevator installation; signage installation (related to Task D); infrastructure upgrades
- Ensure that the recommended renovations and improvements are, to the best of your knowledge, providing ADA conformity and improving the facility for the small businesses operating there and the community frequenting the facility and its small businesses.

F. Home Roots Initiative Strategies Document

- Provide a document with recommendations for developing actionable strategies that address the identified needs of and data analysis findings for the Initiative in providing services to Bloomfield and the surrounding communities
- Prepare a final report summarizing the findings from the community engagement process, highlighting critical needs, challenges, and opportunities
- Prepare a final report that addresses the required facility upgrades highlighting the recommendations as a benefit to the execution of the Home Roots Initiative
- Prepare a final document clearly illustrating policy and strategy recommendations for the near- and long-term

G. Final Deliverables

- A Community Engagement and Marketing and Implementation Strategy Plan and timeline.
- A comprehensive Service Needs Assessment report, as detailed in this RFP, with data analysis, findings, and recommendations to assist the Home Roots Initiative in engaging and educating the surrounding Bloomfield community as to the small business services available
- A Home Roots Initiative Strategies Document as detailed in this RFP
- A presentation of an interim report summarizing the community engagement results, needs assessment, data analysis, and economic development strategies document

- A detailed Facility Needs Assessment and Cost Analysis as detailed in this RFP.
- A presentation of the final report to relevant stakeholders, including Bloomfield and the surrounding communities' minority business owners, Advocacy to Legacy, Town of Bloomfield officials, community leaders, and other stakeholders as determined.

5. PROPOSAL REQUIREMENTS

Interested consultants should submit their proposal in the following order:

A. General Information

- Contact Information: Name of consultant/firm, mailing address, phone number, e-mail address and website
- Letter of Interest: What interests you about this opportunity and what differentiates your process and experiences from others

B. Proposal Narrative, Qualifications, Team, and References

- Opening Narrative: A detailed description of the consultant's approach to conducting the community engagement process, including methodology, engagement strategies, and timeline
- Qualifications: A summary of the consultant's experience and qualifications, including relevant projects and references, and firm's brochure
- Team: A description of the team's expertise, including qualifications of key personnel. Include name, email address, title, and education. An organizational chart should be included illustrating the proposed team organization. Project management and task leads should be clearly identified, including prime consultants and subcontractors and their respective roles.
- References: Three (3) client references (please include each individual's name, address, phone number, email address, and work conducted for the bidder).

C. Project Approach - Plan, Budget, and Cost Proposal

- Work Plan: Detailed work plan, to include:
 - List of meetings and milestones
 - Specific activities to be conducted in each phase
 - Schedule (duration) of activities in each phase
 - List of deliverables

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- **Budget:** A detailed budget outlining the costs by task associated with the project, including personnel, materials, outreach efforts, data collection, and reporting. An hourly rate and expense schedule should be included. Project management costs should be detailed.
- **Cost Proposal:** A full cost proposal should be provided to supplement the detailed budget. Such a proposal may also identify hourly costs for subsequent and optional work related to future implementation or pursuing additional grant funding for implementation phases.

D. Timeline

- A proposed timeline to complete the full project, from the engagement process to planning through final report submission. Key milestones should be identified. The deadline to complete the study is December 19, 2025.

E. Attachments & Supporting Documents

- Supporting documents as applicable

6. PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated based on the following criteria with an emphasis upon qualifications, scope of work, work plan and budget:

- Understanding of the project goals and the community's needs
- Methodology and approach to community engagement
- Consultant's experience and qualifications
- Budget feasibility and cost-effectiveness
- Ability to meet project deadlines

7. Submission Deadline

All proposals must be submitted by **April 11, 2025, at 2:00 PM ET**. Late proposals will not be considered.

8. Submission Instructions

Proposals must be submitted via email to Advocacy2Legacy@gmail.com.

All proposals must be formatted in 8.5"x11" pages and submitted electronically by **April 11, 2025 at 2:00 PM EST** to advocacy2legacy@gmail.com as a single PDF file not

exceeding 15MB in total size. The subject line should state, “**Home Roots Initiative - Bloomfield, CT.**” Mailed copies will **NOT** be accepted.

9. Questions and Clarifications

Any questions regarding this RFP should be directed to Violette Haldane, Executive Director, via email at Advocacy2Legacy@gmail.com. The deadline for submitting questions is April 2, 2025 at 5:00 PM, and will be answered by April 4, 2025. Answers will be posted on the Advocacy to Legacy website at advocacytolegacy.org.

10. Additional Information

The selected consultant will be expected to collaborate closely with representatives from Advocacy to Legacy and Cottage Grove Circle, along with the Town of Bloomfield, and other relevant stakeholders throughout the project.

11. Evaluation, Notification & Timeline

A. Evaluation:

Proposals will be reviewed and evaluated by Advocacy to Legacy, Cottage Grove Circle, and a selected Town of Bloomfield team member based on the stated proposal evaluation criteria stated within this RFP including an emphasis upon qualifications, scope of work, work plan, and budget.

B. Notification of Selection:

Upon evaluation of proposals and contacting professional references, all proposers will receive written notification regarding their proposal and interviews may be scheduled with more than one finalist. A final recommendation will be submitted for approval by Advocacy to Legacy which is not subject to appeal. The selected consultant will be notified of an intent to award.

Additional information may be required from the selected applicant prior to awarding the project. Advocacy to Legacy reserves the right not to select a proposal if it is deemed insufficiently responsive to the service need. In the event no proposal is selected, Advocacy to Legacy may elect to issue a new RFP.

The selected consultant will be required to enter into a formal contract with Advocacy to Legacy, Inc. after approval from the CT Department of Economic and Community Development.

C. Timeline

The following is the RFP process timeline.

March 10, 2025	Release RFP
April 2, 2025 5:00 pm	Deadline for Questions
April 4, 2025	Questions & Answers Posted
April 11, 2025 2:00 pm	Deadline for Receipt of Proposals
Please see the required Standard Terms and Conditions in Appendix A.	

Appendix A: Standard Terms and Conditions

Consultants (“Consultant(s)”) shall be aware of the following terms and conditions addressing Request for Proposals for the Home Roots Initiative:

1. Advocacy to Legacy does not expressly state or imply any obligation to reimburse firms for any expenses incurred in preparing submissions in response to this request.
2. Advocacy to Legacy does not and shall not discriminate on the basis of sex, race, color, creed, national origin, age, marital status, sexual orientation, or disability of the Consultant, its employees, or its contractors in the award to the successful Consultant.
3. The selected firm must be able to meet all Connecticut Commission on Human Rights and Opportunities (CHRO) affirmative action and equal employment opportunity practices and guidelines.
4. Advocacy to Legacy reserves the right to conduct such discussions with those who have submitted proposals (Consultants) or provided references to assist in the evaluation of any proposal, or to secure maximum clarification and completeness of any proposal.
5. All proposals submitted must be valid for a minimum period of sixty (60) days after the date of the proposal opening. Each Consultant must submit with the proposal a list of all subcontractors, independent contractors, or sub-consultants employed or proposed to be employed by the Consultant in the performance of the contract.
6. Advocacy to Legacy reserves the right to select the most responsible and responsive proposal that it finds to be within the best interests of Advocacy to Legacy, including the right to select a Consultant for reasons other than lowest price. DECD must concur with the selection.
7. Advocacy to Legacy makes no guarantees to any Consultant. The only obligations to be undertaken by Advocacy to Legacy will be those contained in the negotiated contract with the successful Consultant.
8. All work product generated by Consultant will be the property of the Advocacy to Legacy, including without limitation all rights to reproduce, license, assign, sell, and otherwise use the work product in any form, size, format, or medium for any purpose.
9. The Consultant will agree not to discriminate through the services or activities made possible by or resulting from any future contract on the grounds of sex, race, color, creed, national origin, age (except minimum age and retirement provisions), marital status, sexual orientation, or disability. Any violation of this provision shall be considered to be a violation of a material provision of any future contract and shall be grounds for cancellation, termination, or suspension of said contract. The Consultant shall at all times, both in the proposal and in the contract process, comply with all applicable city, state, and federal anti-discrimination laws, rules, regulations, and requirements thereof.
10. All respondents must complete, sign, and return the “CHRO Contract Compliance Regulations Notification to Bidders” form to the grantee at the time of bid opening. Bids

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not including this form should be considered incomplete and rejected. This form can be found at ct.gov/chro.

11. Proposers agree that they or their employees do not currently have, nor will they have, any conflict of interest between themselves and Advocacy to Legacy. Any perceived or potential conflict of interest must be disclosed in the proposal.

12. The State of Connecticut and Advocacy to Legacy shall be listed as additionally insured in Consultant's Certificate of Insurance under the following coverages:

1. Commercial General Liability – \$1M per occurrence
2. General Aggregate - \$2M
3. Umbrella Liability - \$1M