



**SOUTH TEXAS DEVELOPMENT COUNCIL  
COMMUNITY ACTION PROGRAM**

**Strategic Planning  
And  
Comprehensive Community Needs Assessment  
Request for Proposals  
(Jim Hogg, Starr, and Zapata Counties)**

**PROPOSALS DUE:  
09/23/2024  
No later than 5:00 PM CST**

**Attn: Juan E. Rodriguez, Executive Director**  
[jerodriguez@stdc.cog.tx.us](mailto:jerodriguez@stdc.cog.tx.us)  
**(956) 722-3995**

Physical Address	Mailing Address
1002 Dickey Ln. Laredo, TX 78043	P.O. Box 2187 Laredo, TX 78044

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**INTRODUCTION**

The South Texas Development Council (STDC) is a regional planning commission and political subdivision of the State of Texas organized and operated under the Texas Regional Planning Act of 1965, as amended, Chapter 391 of the Texas Local Government Code. STDC is funded through federal, state, and local grants. In 2008, STDC was designated as a Community Services Block Grant (CSBG) eligible entity and has been operating the CSBG and Comprehensive Energy Assistance Program (CEAP) under its Community Action Program (CAP) department.

The CAP Department's mission is to enhance the quality of life for residents in Jim Hogg, Starr, and Zapata Counties by addressing the causes and conditions of poverty. Through direct services, advocacy, partnerships, and leadership, we create economic opportunities that empower individuals and communities.

For additional background information on Community Action, please refer to these sites:  
National Community Action Partnership <http://www.communityactionpartnership.com>  
National Community Action Foundation <https://www.ncaf.org>  
Texas Association of Community Action Agencies <https://tacaatx.org/>  
Texas Department of Housing and Community Affairs  
<https://www.tdhca.texas.gov/programs/community-affairs-division>  
South Texas Development Council <https://stdc.cog.tx.us/>

**GENERAL CONDITIONS**

**Purpose**

The purpose of this solicitation is to solicit proposals for the development of the CAP Department's **Strategic Plan** and **Comprehensive Community Needs Assessment (CNA)** for the counties of Jim Hogg, Starr, and Zapata Counties. For detailed information regarding the scope of work, see **Attachment A**.

**Submission Information**

Closing date: Proposals must be submitted no later than **5 p.m., September 23, 2024**

Inquiries & Contact Person:

All questions concerning this RFP packet should be directed to Juan E. Rodriguez at [jerodriguez@stdc.cog.tx.us](mailto:jerodriguez@stdc.cog.tx.us). Correspondence with individuals other than those listed herein will not be allowed. From the issuance date of this RFP, until a contractor is selected, and the selection is announced, contractors are not allowed to communicate regarding this RFP with any STDC director, employee, or consultant. Any inquiry regarding this RFP must be directed to the contact listed above. STDC reserves the right to disqualify any Proposer who is found in violation of this provision. No questions other than written via email will be accepted, and no response other than written will be binding upon STDC. Submittals will remain on file in accordance with the Texas Open Records Act.

#### Costs of Submission Preparation:

All costs incurred in the preparation of responding to this RFP, any associated travel costs, and subsequent contracted for costs will be the sole responsibility of the Proposer and will not be reimbursed by STDC. Unless otherwise stated, all materials submitted by the Proposer in response to this RFP shall become the property of STDC.

#### Submission Instructions to Proposers:

To be considered responsive and receive an evaluation, proposals must fully address all sections of the RFP. Your proposal should be addressed as follows:

South Texas Development Council  
Community Action Program  
RFP for Strategic Planning and Community Needs Assessment  
ATTN: Juan E. Rodriguez, Executive Director  
1002 Dickey Ln.  
Laredo, TX 78043  
OR via email to [jerodriguez@stdc.cog.tx.us](mailto:jerodriguez@stdc.cog.tx.us)

It is the responsibility of the Proposer to ensure that the proposal is received by the date and time specified above. **LATE PROPOSALS WILL NOT BE CONSIDERED.** Confirmation of receipt is the sole responsibility of the Proposer. Proposal submissions may include value-added alternatives and any relevant information in addition to the information requested in the RFP. Proposals may be withdrawn in writing prior to the deadline.

#### Notification of Award:

STDC anticipates but does not guarantee that a contract or multiple contracts will be awarded on or around September 26, 2024. Award(s) will be made to the Proposer(s) based on the listed evaluation criteria and the responses that are most compatible with STDC's needs. STDC will be the sole judge in making this determination.

STDC is not bound to accept the lowest bid, nor any proposal submitted. A contract for the approved proposal will be drafted based upon the factors described in this RFP. The term of this Agreement is for a one-year period.

STDC may investigate the qualifications of any individual or institution under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP. STDC also reserves certain rights, including, but not limited to, the following:

- A. Reject any or all of the proposals
- B. Issue subsequent Requests for Proposals
- C. Cancel the entire Request for Proposal
- D. Remedy technical errors in the Request for Proposal process
- E. Appoint evaluation committees to review qualifications and proposals
- F. Seek the assistance of outside technical experts in evaluation
- G. Approve or disapprove the use of particular subcontractors
- H. Solicit best and final offers from all, some, or one of the contractor(s)
- I. Award a contract to one or more contractor(s)
- J. Waive informalities and irregularities in RFP
- K. Award without discussion
- L. cancel an awarded contract within a thirty (30) day written notice if performance is unsatisfactory. No penalty and/or fee may be imposed
- M. Conduct pre-contract negotiations with any and/or all potential qualified contractors

This RFP shall not, in any manner, be construed to be an obligation on STDC to enter into a contract or result in any claim for reimbursement of cost for any effort expended in responding to the RFP or in anticipation of any contract.

Expected Timelines\*:

RFP Publication:	September 6, 2024
RFP Submission Deadline:	September 23, 2024 by 5 pm CST
Estimated Contract Start Date:	October 1, 2024
CNA First Draft presented:	November 14, 2024
CNA Revised Draft presented:	January 9, 2024
Strategic Plan Draft presented:	January 9, 2024
Strategic Plan Revised Draft presented:	March 20, 2024

\*Timeline subject to change upon negotiations with selected proposer.

**ADDITIONAL TERMS & CONDITIONS**

Confidentiality:

The Proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to STDC, the Proposer agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the Proposer's possession, to these employees on the Proposer's staff who must have the information on a "need-to-know" basis. The Proposer agrees to notify immediately, in writing, STDC's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

#### Limitations and Reservations:

STDC reserves the right to negotiate the terms and conditions of the contract with any of the evaluated Proposers. Should the successful Proposer and STDC fail to come to an agreement, STDC may at its sole discretion award work to any of the remaining Proposers. The Proposer to whom the contract is awarded shall be required to enter into a written contract with STDC. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract.

This RFP does not commit STDC to award a contract, to pay any costs incurred for the preparation of proposals or to procure or contract for any services.

STDC specifically reserves the right to vary the provisions set forth herein any time before the execution of a contract where such variance is deemed to be in the best interest of the needs of STDC.

If selected for negotiations, Proposer may be required to prepare and submit additional information before final Proposer(s) selection, to reach terms for the provision of services, which are agreeable to both parties.

#### Small, Women and/or Minority-Owned Business:

Efforts will be made by STDC to utilize small businesses, women and minority-owned businesses, with the consideration that the primary responsibility is the most favorable return to STDC. A Proposer qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201).

#### Equal Opportunity:

It is the policy of STDC not to discriminate on the basis of race, color, creed, gender, religion, marital status, age, national origin or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief or any other consideration made unlawful by applicable federal, state or local laws. Contractor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Agreement, with respect to hiring, tenure, terms, conditions, and privileges of employment, or a matter directly or

indirectly related to employment, because of age or race, color, creed, gender, religion, marital status, age, national origin, or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief. Contractor further agrees that every subcontractor entered into for the performance of the Agreement shall contain a provision requiring non-discrimination in employment herein specified binding upon each subcontractor. Breach of the covenant may be regarded as a material breach of the Agreement.

## **COMPLIANCE WITH STATE AND FEDERAL LAWS**

Historically Underutilized Businesses:

It is STDC policy to encourage participation of small and historically underutilized businesses (HUBs), as defined in Government Code, Chapter 2161. "Historically underutilized business (HUB): means an entity with its principal place of Business in this state that is:

- a corporation formed for the purpose of making a profit in which 51 percent or more of all classes of the shares of stock or other equitable securities are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the corporation's control, operation, and management;
- a sole proprietorship created for the purpose of making a profit that is completely owned, operated, and controlled by an economically disadvantaged person;
- a partnership formed for the purpose of making a profit in which 51 percent or more of the assets and interest in the partnership are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the partnership's control, operation, and management;
- a joint venture in which each entity in the venture is a historically underutilized business, as determined under Government Code Chapter 2161; or
- a supplier contract between a historically underutilized business as determined under Government Code, Chapter 2161 and a prime contractor under which the historically underutilized business is directly involved in the manufacture or distribution of the goods or otherwise warehouses and ships the goods.

It is the goal of STDC to include HUBs in at least 10 percent (10%) of the total value of contracts awarded annually.

Certification with Regard to Lobbying:

No Federal appropriated funds will be paid to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any federal Contract, the making of any federal grant or loan, the entering into of any cooperative agreement or the extension, continuation, renewal, amendment or modification of any federal Contract, grant, loan, or cooperative agreement.

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

#### Equal Employment Opportunity:

The Equal Employment Opportunity Clause required under Executive Order 11246, the affirmative action commitment for disabled veterans and veterans of the Vietnam era, set forth in 41 CFR 60, the affirmative action clause for handicapped workers, set forth in 41 CFR 60, and the related regulations of the Secretary of Labor, 41 CFR Chapter 60, are incorporated by reference in the contract. By accepting the contract, vendor certifies that it complies with the authorities cited above, and that it does not maintain segregated facilities or permit its employees to perform services at locations where segregated facilities are maintained, as required by 41 CFR 60.

#### Drug Free Workplace:

The Contractor is considered a representative of the Agency while carrying out the duties of the contract. The Agency has a policy that prohibits the possession and/or use of alcohol or illegal drugs when conducting Agency business. If the Contractor is observed engaging in this type of behavior while performing any aspect of the contract, termination of the contract will occur.

#### Debarment and Suspension:

The contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency. Ideally the selected proposer shall be registered with Sam.gov and available for public search to verify federal eligibility to receive awards.

### **PROPOSAL SUBMITTAL GUIDELINES**

Proposals should be as brief and concise as possible, providing relevant information and excluding marketing materials. Responses are limited to **14** letter size pages, single sided. Charts and Exhibits may be a larger size but must be folded to the standard size when submitted. Each proposal must include all of the following content in each of the following sections:

- 1) Vendor Information Page:** An individual authorized to bind the consultant's firm must sign the vendor information page. Indicate the address and telephone number of the contact person for this assignment. **Page limit: 1**

- 2) Individual/Company Experience and Qualifications: Include name, address and telephone number of the proposer and all key personnel that will assist in providing the requested service (resumé not included in page limit, if provided). Provide a brief history of experience, including the number of years in business, bonding information (if applicable), and the number of years providing the type of proposed services. **Page limit: 2**
- 3) Process Proposal Narrative Questions and Work Plan: **Page limit: 7**
  - a) Briefly summarize how you plan to collect quantitative data while meeting all requirements.
  - b) How does the contractor plan to facilitate and engage community stakeholders for focus groups, survey participation, etc.?
    - i) How many focus groups do you propose? Will these be done face-to-face, virtually, or hybrid? What type of plan do you have in place to make adjustments should this become necessary?
    - ii) How will you ensure needs assessment surveys are available in English and Spanish? How will you ensure that all groups have adequate representation?
  - c) What will be your process in weighing surveys, focus groups, and quantitative data to determine the Top 5 needs?
  - d) Work Plan: Provide a Work Plan that outlines the completion of Tasks provided in Attachment A for Year 1. *At a minimum, the following information should be included in the Work Plan:*
    - i) Activity
    - ii) Activity Timeline
    - iii) Person(s) Responsible for activity completion
    - iv) Potential barriers/challenges for activity completion (if any)
- 4) Cost/Pricing: Provide best and final cost/pricing that includes all expenses associated with project completion of the Agency-wide Comprehensive Community Assessment and Strategic Plan. See note below on proposed pricing limits. **Page limit: 1**
- 5) References: Provide the names and contact person(s) of your three (3) most relevant references for which you or your firm has provided services comparable to the services described herein over the past three years. **Page limit: 3.** At a minimum, the following information should be included for each reference:
  - a) Name, address, and contact information, including email address
  - b) Description and scope of work

#### Cost/Price Proposed

Provide a written proposal dollar amount for the requested **Comprehensive Community Assessment and Strategic Plan**. Total budget allocated for this project is set at \$37,000. Proposers are required to submit a comprehensive budget detailing the total projected costs of the project. This budget should reflect the amount necessary to complete the project efficiently and on time, regardless of the current allocation of funds.

**NOTE:** STDC, as a political subdivision of the State of Texas, does not pay sales or use taxes. The awarded contract will be for the term outlined in the Schedule below. The bid amount submitted

by the Proposer will not be negotiable after acceptance by STDC. Accepted Proposal amounts shall be reflected in the awarded contract and shall not be negotiable during the term of the contract unless a material change in the business operations or service obligations of the parties occurs including, but not limited to, STDC addition or removal of tasks from the scope of services with thirty days' notice to the contracted vendor. STDC reserves the right to select multiple contractors.

**EVALUATION CRITERIA & SCORING**

Experience and Qualifications	0-20 pts
CAN Process proposal and the proposer’s ability to meet timelines according to the work plan	0-25 pts
Strategic Plan process proposal and the proposer’s ability to meet timelines according to the work plan	0-25 pts
Cost/Price	0-20 pts
Strengths of References	0-10 pts
<b>TOTAL</b>	<b>100 pts</b>

Evaluation and Award of Proposals:

In accordance with applicable laws, rules and regulations for public purchasing, award(s) will be made to the responsible proposer(s) whose proposal(s) is/are determined, after evaluation by assigned staff to be the best value to STDC. The proposal must be submitted on time and must materially satisfy all mandatory requirements identified above to qualify for evaluation. A written acceptance mailed or otherwise furnished to the qualified contractor(s) and a fully executed contract is required prior to commencement of any work under this RFP.

This Request is seeking to identify the Respondent(s) most qualified to provide Needs Assessment Services. STDC, in its sole discretion, will determine the most qualified Respondent(s) to provide the services based on the information in the response submittals. The Respondent(s) may be asked to interview with STDC representatives, make an oral presentation and/or respond to questions regarding the submittal response. STDC may elect to negotiate pricing with one or more of the most qualified Respondents. STDC, in its sole discretion, will make its final selection of the Respondent(s) whose experience, expertise, reputation, capabilities and past performance is determined to be best suited for the performance of the Services. STDC contemplates award of the contract to the responsible Offeror with the highest total points. Protest procedures are available upon request and must be submitted within (10) days of award determination for consideration.

Evaluation Criteria:

The Community Action Advisory Board will review and evaluate all proposals and make a recommendation to the STDC Board of Directors. Each proposal will be evaluated according to

the following set of criteria. The evaluation committee may use any material submitted in the proposal for any item in the evaluation process. **Responses to #1-4 will be scored as listed in the Proposal Requirements and Scoring.**

## ATTACHMENT A SCOPE OF SERVICES

### Background

STDC utilizes a community assessment to analyze the needs and resources of its service area. A community needs assessment serves as a vital management and leadership tool used across the organization in order to set the course for all agency business planning.

### Federal Requirements

The Community Services Block Grant (CSBG) Act requires “an assurance that the State will secure from each eligible entity in the State...a community action plan...that includes a community-needs assessment for the community served...” In 2001, the U.S. Department of Health and Human Services (“USHHS”) issued Information Memorandum 49, requiring eligible entities to conduct needs assessments and use the results to design programs to meet community needs.

In 2015, USHHS issued Information Memorandum No. 138 establishing Community Services Block Grant (CSBG) Organizational Standards, requiring CAAs to conduct a Community Needs Assessment and requires their advisory boards to develop and approve a Strategic Plan.

Please note that consultants are not limited to the components presented here and proposers are encouraged to expand on the suggested components and the approach they would take to refine the Strategic Plan and Community Needs Assessment.

The listed organizational standards strengthen accountability and results of our programs. These standards are meant to ensure that Community Action Agency fulfills the mission of CSBG as outlined in the CSBG Reauthorization Act with regards to Maximum Feasible Participation. Customer satisfaction, quality improvement, **strategic planning**, and the **community assessment** are all activities in which CAA encourages the participation of low-income individuals/families.

Standards Related to Strategic Planning and Community Needs Assessment	
1.1	The department demonstrates low-income individual’s participation in its activities
1.2	The department analyzes information collected directly from low-income individuals as part of the community assessment.
1.3	The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite advisory body.
2.2	The department utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.
2.3	The department communicates its activities and its results to the community.
4.2	The department’s Community Action plan is outcome-based, anti-poverty focused, and ties directly to the community assessment.

4.3	The departments Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the department documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.
6.4	Customer satisfaction data and customer input, collected as part of the community assessment, is included in the strategic planning process.
<b>Standards Specific to Community Needs Assessment</b>	
3.1	The department conducted or was engaged in a community assessment and issued a report within the past 3 years, if no other report exists.
3.2	As part of the community assessment, the department collects and includes current data specific to poverty and its prevalence related to gender, age, and race/ethnicity for their service area(s).
3.3	The department collects and analyzes both qualitative and quantitative data on its geographic service area(s) in the community assessment.
3.4	The community assessment includes key findings on the causes and conditions of poverty and the needs of the communities assessed.
3.5	The tripartite advisory body formally accepts the completed community assessment.
<b>Standards Specific to Strategic Planning</b>	
6.1	The department has a strategic plan, or comparable planning document, in place that has been reviewed and accepted by the tripartite advisory board within the past 5 years.
6.2	The approved strategic plan addresses reduction of poverty, revitalization of low-income communities, and/or empowerment of the people with low incomes to become more self-sufficient.
6.3	The approved strategic plan contains family, agency, and/or community goals.

**Goals and Objectives**

The goal of the proposed project is to develop a comprehensive community needs assessment for the 3-county service area (Jim Hogg, Starr, and Zapata) where CSBG, and CEAP provide services. The comprehensive community needs assessment, and strategic plan will include both qualitative and quantitative data, including data that highlights and analyzes key findings on the causes and conditions of poverty and the needs of the service area. The Proposer will be expected to analyze and synthesize the data to provide an in-depth analysis of the communities and provide recommendations for programming in alignment with STDC’s mission.

The proposer must identify key findings of the causes (the factors causing and/or impacting poverty) and conditions of poverty (what poverty looks like/what the need looks like). Causes of poverty could be lack of jobs, lack of jobs paying a decent wage, lack of basic life skills, lack of completion of secondary education, lack of financial resources, institutional poverty, intergenerational poverty, single-parent households, lack of medical care, etc.). Conditions of poverty (the living conditions at a household and community level of persons in poverty) are conditions such as substandard housing, lack of healthcare providers and facilities, lack of

adequate nutrition, lack of a mass transit system, etc. The proposer is expected to describe the causes and conditions for each county in the proposed assessment area.

### Minimum Standards to Include in Proposal

A Proposer who meets all of the following minimum standards will be given priority. A Proposer without priority may be removed from consideration, regardless of the qualifications or experience of the Proposer or the merit of the proposal. However, a Proposer without priority may still be considered by STDC at its discretion.

This project will consist of six major tasks; each of these tasks is briefly described below. These tasks will be accomplished in coordination with STDC's Community Action Program. The Texas Department of Housing & Human Affairs (TDHCA) oversees STDC's CSBG program and has provided a guide and requirements for completing the needs assessment. These documents can be accessed at:

Community Needs Assessment and Strategic Plan Guides along with other useful information can be found at: <https://www.tdhca.texas.gov/additional-requirements-csbg-eligible-entities-only>

### Tasks to be Performed:

#### **Task 1: Plan and Coordinate to include meeting with STDC's Community Action Program to determine and finalize assessment and strategic plan details.**

- Finalize 1) *what* information to collect; 2) *how* to collect the information; and 3) *who* will participate in surveys, forums, focus groups & interviews (i.e. elected officials, community members, service providers, faith-based organizations, educational institutions, board members)
- Monitor *timeline* to conduct assessment
- Develop *plan* to recruit partners and volunteers to assist in the process
- Provide *continuous feedback* throughout the assessment process to STDC's Community Action Program. Note: It will be expected that the proposer will have contact with the Community Action Program Manager on a weekly basis to discuss progress and address any barriers.

#### **Task 2: Collect Quantitative Data**

- Collect quantitative data for each domain (see chart below) from national, state, and local
- data sources (i.e. Community Commons, American Community Survey, U.S. Census, Texas Education Agency, Texas Dept. of Health & Human Services, Texas Workforce Commission, County Health Rankings & Roadmaps, local chambers of commerce, etc.)

- Summarize data utilizing tables, charts, and narrative as appropriate Include, as appropriate, secondary data sources (universities, state or federal agencies, local governments, newspapers or other publications)

Important Note: Although TDHCA recommends the use of Community Commons, the content of this source has changed since the guide was released and may not provide the information required to meet the standards, in particular, poverty data standards. Appropriate *poverty data* can be located through the U.S. Census Bureau (data.census.gov).

CSBG Domains					
Employment	Education & Cognitive Development	Income, Infrastructure, & Asset Building	Housing	Health & Social/Behavioral Development (includes nutrition)	Civic Engagement & Community Involvement

### Task 3: Collect Qualitative Data

**Surveys:** Community Needs Assessment Surveys & Client Satisfaction Surveys will be administered through electronic and paper means. STDC will be responsible for providing the proposer with customer satisfaction survey results from each of its programs; the proposer will be responsible for completing an analysis and embedding this information into the report. The proposer will be responsible for development and administration of the needs assessment survey.

The survey must be available in English and Spanish and be approved by the Community Action Program prior to distribution. STDC will be responsible for collecting and entering information from paper surveys into the survey platform of the proposer’s choosing. Needs Assessment surveys need to target residents and clients, social service organizations, key community stakeholders (e.g., judges, commissioners, school superintendents, etc.), and STDC’s tripartite advisory and governing Board members. All survey data will be analyzed by the proposer.

The Community Needs Assessment report must include at a minimum, the following:

- Number of surveys distributed;
- Number of surveys returned;
- Methods for distribution of surveys;
- Names of counties surveyed;
- Names of persons or organizations that assisted in conducting the survey;
- Blank copy of the survey instruments
- A summary of the survey analysis per county.

**Public meetings:** The proposer must hold public meetings to gather input from community members in each county. The proposer will determine the number of public meetings and format

(face-to-face, virtually, hybrid) ensuring compliance with funding requirements. If face-to-face or hybrid meetings are proposed, Community Action Program staff will assist the proposer in setting up meeting logistics in alignment with coalition meetings in the area. CSBG staff will assist the proposer in distributing information about the scheduled public meetings to local coalitions; information will also be posted on agency social media websites. During these meetings, the proposer must ask for further input on the top needs in the area, as well as causes and conditions of poverty, community strengths and weaknesses, and related community impacts. A question-answer session will be part of each public meeting.

Items which must be included for each public hearing:

- Transcript of the hearing
- Location of each public hearing (may include virtual platform)
- Time and date for each public hearing
- Name(s) of person(s) that conducted each public hearing
- Method used to publicize the public hearings
- Attendance roster with the name of persons attending each public hearing
- Number of persons giving testimony at each public hearing
- A summary of comments submitted

Please refer to the TDHCA *Community Needs Assessment Guide* for additional qualitative and quantitative data guidance.

#### **Task 4: Analyze Data**

- Analyze quantitative and qualitative data
- Review and categorize survey responses, interview responses, and forum responses
- Develop methodology to take quantitative and qualitative data and rank needs
- Identify the top needs and key findings
- Rank needs (overall and county level) based on findings
- Identify trends and compare data from prior needs assessment
- Identify key findings of the causes and conditions of poverty

The final report from the proposer is expected to include in depth data analysis on the information gathered and recommendations for adjustments in programming (e.g., expansion of service area or scope of services, consideration of new programming categories that are in alignment with STDC's Community Action Program's mission).

#### **Task 5: Composition of Final Report**

The proposer will collect, display (e.g. graphs, charts, etc.), and analyze information produced in

Tasks 1-4. The proposer will be required to provide the Community Action Program with a copy of the report in Word on a weekly basis for feedback. This will ease in reducing final edits and ensure that expectations are being met.

#### **Task 6: Submission and Presentation of Final Report**

A first draft of the full CNA report will be due to the Community Action Program Manager by November 14<sup>th</sup>, 2024 . Recommendations for finalization will be provided within one week from initial report deadline. Two (2) electronic copy of the final report must be submitted to the Community Action Program Manager by **January 9<sup>th</sup>, 2025**. The proposer must present the final CNA report to the STDC Community Action Advisory Board on **January 9, 2025** at 10:00 AM; this presentation will be done virtually. Presentation of the final report should be approximately 15 minutes in length and be accompanied with a visual component (e.g. PowerPoint, Prezi, etc.).

A first draft of the Strategic Plan will be due to the Community Action Program Manager by **January 9<sup>th</sup>, 2025**. Two (2) electronic copy of the final report must be submitted to the Community Action Program Manager by **March 20, 2025**. The proposer must present the final CNA report to the STDC Community Action Advisory Board on **March 20, 2025** at 10:00 AM; this presentation will be done virtually. Presentation of the final report should be approximately 15 minutes in length and be accompanied with a visual component (e.g. PowerPoint, Prezi, etc.).

The electronic copies of the final report must be: One (1) in Word format and one (1) in PDF Format. At this time, the proposer will be responsible for submitting to the Community Action Program Manager the following components of the TDHCA spreadsheet : “Top 5 Needs per County – Tab: Per County” and “Top 5 Needs for Entire CSBG Service Area – Tab: Per Service Area” as required for CSBG.

## ATTACHMENT B

At a minimum, information needs to be gathered, and an analysis provided on the following topics while ensuring CSBG, OHS, and HRSA requirements are met. Data should be provided at the county level with state and national rates as a comparison where applicable/available). The Development Team may request additional information be provided in the topic areas based on progress updates.

- Conditions of poverty: key findings and analysis
- Causes of poverty: key findings and analysis
- Demographic make-up of families including but not limited to: population, geographic location, and racial/ethnic composition.
- Data specific to poverty and its prevalence related to gender, age, and race/ethnicity for service area. (Organizational Standard 3.2)
- Data on poverty and prevalence, comparisons, trends, and current (gender, age, race/ethnicity)
- Economy, Employment & Income
- Education
- Health (including nutrition)
- Disabilities
- Housing
- Economic and Social Indicators
- Qualitative and quantitative data: from all geographic service areas, trends, and comparisons. (Organizational Standard 3.3)
- Customer satisfaction data
- Participation and information from low-income individuals
- Input gathered from key sectors (at least community organizations, faith groups, private sector, public sector and education.
- Other social service agencies in the geographic area and the constituents they serve.
- Data regarding the health, nutrition, and social service needs of the communities as defined by community institutions.
- Availability and accessibility of community resources that can address the needs of eligible families.
- Community member narratives (This is a best practice from the Community Action Partnership).
- Community profiles for each county overview & map
- Key findings section to the final report
- Available resources at agency and in the community assets
- Relationship of CAA's activities to other anti-poverty services
- Data analysis and identification of areas of greatest community needs
- Level of needs and changes over time
- Gaps at family, agency and community level

## ATTACHMENT C

### CNA FINAL REPORT OUTLINE

**The following elements must be included in the CNA Report per TDHCA, but other headers and subheaders can be added to the outline. For detailed guidelines on the content of the CNA, refer to the requirements in the TDHCA *Community Needs Assessment Guide***

- Organizational Profile
- Background on CNA
- CNA Process Overview and Data Collection Methods
- Top 5 Needs
- Organizational Strengths, Assets, and Challenges
- Executive Summary
- County Profiles
  - Summary and Top 5 Needs
  - Demographics of Poverty Population
  - Economic, Education, and Healthcare Affordability Characteristics
  - Indicators of Health and Well-being
  - Causes and Incidence of Mortality
  - Crime Type Incidence
  - Agency's Service Data
  - Community Strengths and Assets
  - Barriers to Asset Utilization and Current Gaps in Services
  - Opportunities for Response from STDC
  - County Trends
- Key Findings on the Causes and Conditions of Poverty
- Client Satisfaction Survey Results
- Appendices
- Community Resources

## ATTACHMENT D

### Strategic Plan Contents

Proposer shall be responsible for following and completing the TDHCA Strategic Planning Guide Excel worksheet as part of the Strategic Planning process. In addition, the final strategic plan should include:

- Strategic Planning Document and Executive Summary
- Program Inventory and Analysis
  - Inventory existing program offerings and partnerships to serve as a baseline to identify service gaps and opportunities for different delivery options, partnerships and collaborations.
  - Identification of Opportunities, Strategies and Vision.
  - Refining the vision for CAA which identifies its priorities, opportunities and strategies and clarifies CAA's role and confirm its mission and values
- SWOT Analysis
- Financial Plan
- Implementation Plan
- Performance Measures

## ATTACHMENT E

The services provided in each of the service counties can be seen below. Although the RFP references requirements for Community Services Block Grant, it is expected that the report will include data and recommendations for all service categories.

### **Jim Hogg County**

Community Services Block Grant  
Comprehensive Energy Assistance Program

### **Starr County**

Community Services Block Grant  
Comprehensive Energy Assistance Program

### **Zapata County**

Community Services Block Grant  
Comprehensive Energy Assistance Program