



Request for Proposals for Legal Services

Response Deadline: April 13, 2023, by 4:00 p.m. CST by email

Submit: Following the instructions in Section E, email an electronic copy of your proposal to:

Mary Vandevord, President & CEO
mary.vandevord@heartlandsconservancy.org (watch your spelling carefully)

Format: One compiled document in PDF format. See the requirements below.

Questions: Please read this document thoroughly first. Submit all questions in writing to mary.vandevord@heartlandsconservancy.org with "RFP - LEGAL SERVICES QUESTION" in the subject. Submit questions by March 30, 2023.

INTRODUCTION

HeartLands Conservancy (HLC) is a 501(c)3 nonprofit corporation serving southern Illinois and headquartered in Belleville, Illinois. HLC was established in 1989 and is organized for the following purposes:

- a) To promote the wise use of land, water, and natural resources in southern Illinois;
- b) To acquire, maintain, and protect open space, including but not limited to, natural areas, scenic areas, agricultural land and associated agricultural buildings, parks, gardens, floodplains, stormwater storage areas, and other environmentally or culturally significant areas by acquiring fee title to properties, obtaining conservation easements and securing development rights, and to hold interests in land in trust for the people of Illinois in perpetuity;
- c) To educate the public on natural resource and land conservation, maintenance, and protection, wildlife habitat, watershed health, community growth issues, and to provide opportunities for people to interact with the environment;
- d) To assist governments and communities in developing and implementing plans, including but not limited to, wise use of land and community growth, enhanced quality of life, parks and park system development, natural resource management, cultural resources, community forestry, stormwater management, bicycle, pedestrian, and trail development, and other environmental resource issues and opportunities; and
- e) To develop watershed-based plans and stormwater plans for regional water quality improvement and flood mitigation.

HeartLands Conservancy is a qualified conservation organization and a land trust that meets the purposes of IRC section 170(h)(4)(A). As a land trust, the organization holds fee-title to land, conducts real estate transactions, and holds conservation easements to preserve land and habitat in perpetuity. The organization also operates programs and services through contracts and grants with local, state, and federal entities and private dollars.

To further HLC's organizational purposes, the corporation requires legal advice, representation, and expertise on various matters. The organization does not have in-house counsel.

Board of Directors: Up to 17 board members, meetings held quarterly with monthly committee meetings

Budget: 2023 Annual Operating Budget is \$2 million

Employees: 10 - 12 full-time employees, 2 seasonal employees, and avg of 2 part-time employees

HLC is issuing this Request for Proposals (RFP) for qualified legal services firms to provide services on an as-needed basis during the calendar year 2023, with the option for HLC to renew services for a period of three (3) years (through December 31, 2025).

SCOPE OF SERVICES

HeartLands Conservancy (HLC) seeks a qualified attorney or law firm to provide legal services in several areas. The successful attorney(s) or law firm must carry professional malpractice insurance coverage. Any attorney designated to provide any services must be a member in good standing of the Illinois Bar. Legal services (representation and advice) are sought and may be used, on an as-needed basis, in the following practice areas:

1. **General operations and administration:** Providing legal counsel to HLC, its Board of Directors, and staff across a wide range of operational matters, such as federal and state grant administration, insurance/risk management, non-profit corporation governance, contract agreements with governments, contractors, and other entities, vendor actions, liability, procurement, and review and interpretation of statutes, rules, and regulations.
2. **Real estate:** Acquisitions, disposals, easements (particularly conservation easements), leases, licenses, title review, and other due diligence.
3. **Employment:** Employment policies, contracts, and personnel matters, such as FMLA, and worker's compensation.
4. **Construction and Maintenance Liability and Environmental Law matters**

HLC will consider proposals from firms able to provide expertise in one or more of the categories above and reserves the right to select multiple firms. As a result, all interested firms are encouraged to submit proposals, even if a particular firm cannot provide services in all four categories.

SUBMITTAL PROCESS & REQUIREMENTS

Materials submitted should generally outline the respondent's qualifications as applicable to the Scope of Services and include the following:

1. Firm name, location, and contact information.
2. Cover letter indicating the services that the firm is qualified and interested to provide from the above Scope of Services.
3. Experience - Demonstrate the firm's experience with the applicable Scope of Services. Include the type and number of clients served; and the size, scope, and nature of projects. Identify any prior experience working with conservation land trusts or similar nonprofit organizations.
4. Qualifications and expertise - Provide resumes outlining the qualifications of the key personnel proposed for the services. Include any professional certifications, licenses, memberships, etc.
5. Availability and approach - Provide a statement of the firm's availability to provide services and approach.
6. Proposed Fees/Expenses - Clearly state all fees and expenses. Provide hourly rates (with any applicable nonprofit discounted rate) to be charged for each individual who would be assigned to HLC's scope and a general breakdown of how billable hours will be allocated among key personnel. Pricing should be provided for a three-year period - 2023, 2024, and 2025. Itemize the type of expenses for which your firm would seek reimbursement.

SELECTION CRITERIA

Proposals will be reviewed for completeness and qualifications. Selection will be made based on the following criteria:

1. Qualifications, expertise, and experience in providing similar services;
2. Qualifications of the individuals assigned from the firm and sub-consultants (if any);
3. Availability and approach to providing the services; and
4. Cost.

PROCESS AND CONDITIONS

- HeartLands Conservancy reserves the right, at its sole discretion, to
 - Reject any or all submittals;
 - Waive minor informalities of a submittal;
 - Cancel, revise, or extend this solicitation; and
 - Request additional information
 - Select one or more responding parties or to select separate responding parties for various components of the scope of services;
 - Terminate negotiations at any time; and
 - Select a final party/parties from among the proposals received in response to this RFP. HLC reserves the right to modify or terminate any aspects of this RFP process and to obtain further information from any and all responding parties.
- HLC may follow up with responding firms with additional questions regarding their proposal.
- This RFP does not commit HLC to award a contract, defray any costs incurred in preparing a response to this RFP, or contract for any services.

SUBMISSION AND SCHEDULE

To be considered, proposals must be received by 4:00 PM Central Time Zone on Thursday, April 13, 2023. Submit one (1) PDF document via email to Mary Vandevord at mary.vandevord@heartlandsconservancy.org with the subject line "LEGAL SERVICES PROPOSAL"

If the PDF is over 10MB, Please try and reduce the size or please use WeTransfer.com (free) to transmit a link for larger files. DropBox, Google Drive, or other file-sharing services will not be accepted for this submission. If using Wetransfer, please send WeTransfer link via your email in addition.

Following this submission, HLC staff will evaluate the proposals submitted and identify a list of firms for pre-qualification. Staff will present this list to the HLC Board of Directors and Governance Committee for decision. An announcement of inclusion will be made in May 2023.

Because things happen... In case of emergency or technical failure, hard copies may be dropped off in a sealed envelope in % Mary Vandevord, HeartLands Conservancy, 29 E.Main Street, Belleville, IL 62220. There is a mail slot next to our front door, in the bottom window. Please no calls.

Questions: Submit all questions in writing to mary.vandevord@heartlandsconservancy.org with "RFP - LEGAL SERVICES QUESTION" in the subject. Submit questions by March 30, 2023.

HeartLands Conservancy is an equal opportunity provider.