

**REQUEST FOR PROPOSAL**

**COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
Strategic Planning Services  
RFP # 08-1018**

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**Issued  
August 10, 2018**

**Proposal must be received no later than  
August 31, 2018**

**Community Relations – Social Development Commission  
1730 W. North Avenue  
Milwaukee, WI 53205  
Attn: Terri Eckels-Nikoo, Purchasing Coordinator  
RFP # 08-1018**

## **General Information**

The Community Relations-Social Development Commission (CR-SDC) of Milwaukee is seeking proposals for strategic planning facilitation and board training and development services. The selected vendor will work with the CR-SDC board and staff to identify strategic priorities for the organization, resulting in the development of a written plan for the organization and to provide consultation, training and board development in certain specific areas.

The organization's past successes provide a number of opportunities for growth, but with limited resources SDC must be strategic about which opportunities it chooses to pursue. With the fulfillment of prior strategic objectives, the organization is now ready to augment its focus through the development of a strategic plan. The role and function of the Board of Commissioners is a key factor in achieving the agency's objectives. SDC has determined that retaining the services of a skilled facilitator is essential in creating its strategic vision and conducting board training and development.

The intent of this RFP is to have the successful strategic planning and board training facilitator enter into a professional services contract with SDC to provide services as outlined herein.

Proposals will be accepted until **1:00 pm on August 31, 2018**. Submittals relative to this Request for Proposal should be addressed to:

CR-SDC Purchasing Division  
Attn: Terri Eckels-Nikoo  
1730 W. North Avenue  
Milwaukee, WI 53205  
**Strategic Planning Services**  
RFP# 08-1018

**Written responses and all supporting materials must be submitted in one original plus Five (5) copies.**

## SCOPE OF SERVICES

The Community Relations-Social Development Commission (CR-SDC) desires to secure the services of a skilled accredited facilitator for the following purposes:

(1) To facilitate input for our 2018 strategic plan/goal setting effort. This plan will cover a three year strategic implementation timeline to help guide the SDC's priorities and budget allocations within that time-frame.

(2) To provide consultation, training and board development with respect to the SDC Board of Commissioners with a focus on certain specific areas.

The following activities are anticipated to be a part of this assignment:

Information Gathering – The facilitator will be expected to gather background information to support his/her work with SDC. The facilitator may determine his/her own process for gathering information, but is expected include the following:

- Qualitative and Quantitative research
- Comparative and historical document reviews
- Interviews with key stakeholders
- Community Based Organization peer research
- Community Action Program peer research
- Review of laws and policies applicable to the Board of Commissioners and the Agency

Strategic planning stakeholder input sessions (internal) –

The Board of Commissioners and staff will have a strategic planning session in 4<sup>th</sup> quarter of 2018 or 1<sup>st</sup> quarter of 2019. The facilitator will be expected to lead board and staff through this process.

We anticipate that at the conclusion of the sessions that the group will have agreed to the framework for a strategic plan. Sessions will be dependent upon timeline.

The process is expected to include:

- Identification of short-term and long term goals and objectives
- Identification of fiscal constraints and opportunities to achieve strategic goals and objectives
- Discussion of linking strategic plans to budget priorities and operational plans
- Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

Documented (recommendations) – The facilitator will be responsible for preparing, from the results of the strategic planning meeting, a formal strategic plan document and final report for the board to adopt.

The facilitator will be expected to complete this document in a timely and sufficient manner to allow board members to review the completed document depending on timeline.

## Board Training and Development Session

The Board of Commissioners will have a board training and development session in conjunction with the strategic planning session. The facilitator will be expected to lead the board through this process.

This process is expected to include:

- Strengthening governance framework
- Overview of Federal, State and local laws and ordinances applicable to the Board and Agency
- Review of board policies, including, but not limited to, conflicts of interest and use of social media
- Recruitment, orientation, training, onboarding and development of new board members
- Issues and parameters regarding board advocacy
- Effective fundraising and development

We anticipate that at the conclusion of the board training session the Board of Commissioners will be knowledgeable and informed in the areas covered by the training.

## General Requirements of Proposal Content

**Proposals should address the areas listed below. Respondents may supplement proposal narratives with additional material (such as brochures, promotional materials, letters of recommendation, sample materials, etc.).**

1. Please describe the process you prefer to follow in strategic planning efforts. How do you ensure that all participants are fully engaged in the process? In your opinion, what distinguishes a successful strategic planning process from an unsuccessful one, and how do you ensure that the process will be a successful one?
2. Please describe what you believe distinguishes an outstanding strategic plan. What elements do you think must be included in a high quality strategic plan? What in your approach to strategic planning can assure SDC that the final product of its strategic planning effort will align with your idea of an outstanding strategic plan?
3. Please describe the process and approach you would follow in providing the training and board development requested in this RFP.
4. Cost and basis for cost – Please list the total cost for the services you describe in your proposal. Provide the basis for your cost estimate (such as cost per hour of facilitation, cost per actual time spent on all activities, a flat fee, or other basis). Be sure to account for any expenses, such as mileage, if expenses are not included in your proposed fee. The cost basis may be used in negotiating the final contract amount with the successful proposer, so proposers are encouraged to provide as much detail as possible for their cost estimates.

**The firm or individual responding to this RFP must provide the following:**

1. Cover letter on firm letterhead indicating the name and title of the person(s) who are authorized to answer questions about the RFP response. The cover letter should be limited to one page in length and summarize the key elements of the proposal.
2. Statement of Qualification: This section must not exceed two (2) type written pages and should include relevant details about your educational background, experience, and applicable skill sets.
3. Evidence of substantial knowledge and experience in developing strategic plans for local non-profit organizations. Please provide evidence of your past success in similar work. Examples of such evidence include copies of at least two (2) examples of adopted Strategic Planning documents developed under your guidance from other organizations, and (2) examples of board training materials developed by other organizations under your guidance.
4. Evidence of substantial knowledge and experience in facilitating strategic planning meetings and board training sessions. What experience do you have leading strategic planning and board training processes similar to what SDC is proposing? Do you have experience working with organizations similar in size, scope, and mission to SDC?
5. At least five (5) professional letters of reference/recommendation of Organizations for which you have done Strategic Planning and Board Training & Development for. The references should include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**ELIGIBILITY REQUIREMENTS**

The Contract award will be made after successful negotiation of a final agreement with the respondent whose proposal is selected from all respondents with the implementation of services to follow. This RFP, however, does not indicate a commitment by the CR- SDC to award a contract to any successful respondent. The CR-SDC reserves the right to reject any and all proposals without cause and to end negotiations without cause. A selection is estimated to occur within approximately two days after receipt of proposals. The CR-SDC intends to evaluate the proposed services based upon the data presented in response to the RFP. The proposals will then be reviewed based on qualifications, specific experience, references, familiarity with the services, and compensation; and then will be rated according to which firm best meets the needs of the CR-SDC.

Applicants whose existing contracts with CR-SDC are not in good standing will **not** be considered for a contract. Agencies not eligible include those that have had a CR-SDC contract terminated for default; are currently debarred and/or have been issued a final determination by a City, State or Federal agency for performance of a criminal act, abridgement of human rights or illegal/fraudulent practices.

Those firms whose proposals most closely satisfy the needs and requirements of the CR-SDC may be required to attend an interview and discussion meeting with the CR-SDC staff on a date to be determined. Failure to attend this meeting, if selected, may give cause to have your proposal declared non-responsive and rejected, at the CR-SDC's discretion.

### **CONTRACT AWARD**

Under this Formal RFP, the contract period is estimated to begin upon execution of the signed agreement. The RFP will be reviewed by the CR-SDC on an individual basis. The CR-SDC reserves the right to terminate the contract at any time should the vendor not meet service and performance expectations.

### **CONTRACT SPECIFICATIONS**

A complete response to this Request for Proposal (RFP) must include answers and completion of all of the above and any attached questions and statements. Any CR-SDC signature to accept this proposal or enter into a relationship agreement will be subject to review by CR-SDC Legal Services. The appropriate and authorized CR-SDC signer(s) will not sign any documents until all CR-SDC potential legal reviews and concerns with the pending documents are resolved in writing.

A contract will be issued to the successful bidder. The selected provider will be expected to meet performance objectives as determined by CR-SDC. Failure to perform can result in termination of the contract. CR-SDC will consider all of the following factors listed below, as well as the completeness and timeliness of responses addressed in the RFP in the evaluation of all proposals. Please include all of this requested information in your RFP response.

### **Additional Information**

**Letter of Intent** (Deadline: August 17, 2018 1:00p.m. CT)

To assist in the evaluation of potential Strategic Planning Services, please provide the following information:

#### **Firm**

1. Firm name, address, and contact information including telephone number, fax number, and website address.
2. Names and titles of all principals of the firm (name, title, phone number).
3. Type of firm: individual, partnership, corporation, subsidiary, or government entity; and whether in good standing at the time of submitting the proposal.

4. Organizational structure of the firm, history, including number of years in existence, number and location of offices, and total number of employees.
5. Provide details of your firm's financial status and stability.
6. Discuss any impending changes in your firm that could impact the delivery of services.
7. What characteristics most distinguish your firm from your competitors? Summarize the benefits to our organization of engaging your firm.

**Other**

1. Are there any conflicts of interest between your firm and the Community Relations-Social Development Commission (CR-SDC)? If "yes" please elaborate.
2. Has your firm or anyone that will be working with the CR-SDC ever been cited by a professional or regulatory governing body for disciplinary reasons? If "yes" please elaborate.

**Please review the following important information prior to submission:**

➤ **Non-discrimination:** Any agency or organization providing services for CR-SDC agrees not to discriminate against any employee, client, or applicant for employment or services on the basis of age, race, religion, color, disability, physical condition, sex, national origin or ancestry, arrest or unrelated conviction record, sexual orientation, military/veteran status or military participation. This provision shall include, but not be limited to all employment situations and selection for services.

➤ **Insurance Requirements**

General Liability:	\$1,000,000.00/ Per Occurrence \$2,000,000.00/ Annual Aggregate
Personal Injury:	\$1,000,000.00/ Per Occurrence
Fire Legal Liability:	\$100,000.00/ Per Occurrence
Products Completed Operations:	\$1,000,000.00/ Per Occurrence
Medical Payments:	\$5,000.00/ Per Occurrence
Owned Auto Liability and or -	\$1,000,000.00
Non-Owned/Hire Auto Liability -	If Automobiles Utilized
Workers Compensation:	Statutory Employers Liability
(\$500/\$500/\$500)	
Professional Liability:	\$1,000,000.00/Annual Aggregate Per Specialty

**Community Relations-Social Development Commission is to be named additional insured on all liability coverage, evidenced via a certificate of insurance.**

**INSTRUCTIONS**

**Cover Sheet**

The enclosed Cover Sheet is the first page of the application. Use that form or replicate the form ensuring all information is provided. A signature is required to qualify the applicant for consideration.

**Minority Certification (If applicable)**

\* CR-SDC intends to use EBE/DBE'S (Small, Minority and Women) vendors whenever practical, in accordance with the agency's mission. CR-SDC will endeavor to bid to EBE/DBE's whenever and wherever possible. Bids can possibly be awarded to these vendors if they come within 5% of the lowest bidder and if the quality of the service or goods supplied is of at least equal quality compared to the other vendors. EBE/DBE's vendor must be certified to receive this 5% preference (the State of Wis., City of Milwaukee EBE. or Wis. Unified Certification Program). Certification documentation must be attached to all copies to qualify for points.

**IMPORTANT DATES**

Formal RFP Issued: Friday, August 10, 2018

Deadline for Letter of Intent: Friday, August 17, 2018 1:00p.m. CT

Deadline for Submitting Written Questions: Friday, August 17, 2018 1:00p.m. CT

Mandatory Bidders Meeting: Tuesday, August 21, 2018, 2:00p.m. CT

Proposal Submission Due Date: Friday, August 31, 2018, 1:00 p.m. CT

Estimated Start Date: November, 1, 2018

Proposals must be received no later than August 31, 2018, 1:00p.m. CT. Proposals will not be accepted via-email or fax. Proposals will be opened on August 31, 2018, 1:05 p.m. CT. Late proposals will not be accepted. Please do not include material other than that requested. Additional materials may be discarded.

**FOR ADDITIONAL INFORMATION OR CLARIFICATION**

All correspondence regarding this RFP must be conducted through e-mail and must be received by 1:00 p.m. CT, August 17, 2018 with RFP# 08-1018 referenced.

Contact for information or clarification:

**Community Relations – Social Development Commission**  
**1730 W. North Avenue**  
**Milwaukee, WI 53205**  
**Terri Eckels-Nikoo, Purchasing Coordinator**  
**(414) 906-2803**  
[tnikoo@cr-sdc.org](mailto:tnikoo@cr-sdc.org)



If any updates to this RFP become available, interested parties will be notified by email.

### **BASIS FOR AWARD OF CONTRACT(S)**

A decision will be rendered by staff and management from the SDC. Decision factors will include, but are not limited to, budget, and ability to communicate appropriately with the Facilities Manager. Proposals will be judged on completeness of response and be numerically scored and qualitatively assessed. In the event that proposals receive similar scores after the assessment process, potential vendors may be required to meet with SDC staff for a brief interview to clarify various points-of-interest. Incomplete proposals will not be reviewed. Certified minority-owned and women vendors are strongly encouraged to apply. All applicants will be notified of the final decision. As a result of this Request for Proposal (RFP), the effective date of any individual or aggregate award(s) is projected to be September, 7, 2018.

### **GRIEVANCE PROCEDURE**

Once a vendor has been selected pursuant to the agency's competitive proposals process, an unsuccessful applicant or bidder may raise any question, challenge, or appeal with respect to the selection process in the following manner:

1. Any complaint or challenge to the selection process must be communicated in writing to the CR-SDC Executive Department within three business days of the date that notice of selection/non-selection was received.
2. The CR-SDC Executive Office shall provide a written response to the complainant within five business days of receipt of the written complaint.
3. If after the review of the response described in step 2, above, the complainant remains unsatisfied with the process, the complainant may file a grievance with the Executive Committee of the Board of Commissioners. The grievance must be in writing, must clearly set forth the grounds or basis for the grievance, and must be filed within five business days after receipt of the response described in step 2, above. The Chairperson of the Executive Committee will review the grievance and may convene the Executive Committee to discuss the complaint. The Committee may consult with persons necessary to determine the following issues:
  - (a) Did the selection process violate any policy or procedure of the agency?
  - (b) Did the selection process violate any Federal, State, or local law?

The Chairperson shall communicate a written decision to the complainant within 30 calendar days of receiving the written grievance. The written decision of the Chairperson shall be final.

## **Criteria Review**

### ***STATEMENT OF QUALIFICATIONS:***

- 1) Firm Experience (25 points)***
- 2) Firm Expertise (25 points)***
- 3) Rates (20 points)***
- 4) Special Services (20 points)***

***Maximum 90 Points***

### **REFERENCES /MINORITY-OWNED VENDOR**

- 1) References - The applicant has provided the names and contact information of five non-profit or government references where similar services have been rendered. (5 points)
- 2) Minority-Owned Vendor - The applicant is a certified minority-owned vendor. Certification documentation must be attached to proposal to qualify for points. (5 points)

***Maximum 10 Points***

• **PROPOSAL CHECKLIST** •

**Cover Sheet with signature:** Original and five (5) copies. The cover sheet should be the first page of the proposal.

**Statement of Qualifications:** Exhibit A - Original and five (5) copies. Not to exceed two (2) typewritten pages, single-spaced, 10-point font or larger and 1-inch margins on all sides.

**Examples of strategic planning:** Provide at least two (2) examples of adopted Strategic Planning documents developed under your guidance from other organizations.

**Letter of Intent:** Information provided on page 6 and 7 of RFP.

**References:** Five (5) professional letters of reference/recommendation for whom you have provided similar services for. References must include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.

**Minority Vendor Certification** (if applicable): One (1) copy of certification documentation must be attached to original in order to qualify for bonus points.

**Mailing Envelope:** All materials should be sealed in one (1) envelope. All responses must have Strategic Planning Services RFP# 08-1018 printed on the front of the envelope and must be physically received by 1:00 p.m. on **Friday, August 31, 2018 (no faxes or emails will be accepted)**.

**REQUEST FOR PROPOSAL # 08-1018  
COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION  
Strategic Planning Services**

**COVER SHEET**

**Organization Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Ext:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Website:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Social Security or Federal ID Number:** \_\_\_\_\_

**Total Proposed Budget if applicable:** \_\_\_\_\_

**Certified Minority Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_      **Certified EBE** YES \_\_\_ NO \_\_\_

**Certified Woman Vendor\*** YES \_\_\_\_\_ NO \_\_\_\_\_      **Certified DBE** YES \_\_\_ NO \_\_\_

**Certification documents attached** YES \_\_\_ NO \_\_\_

SDC intends to use EBE/DBE'S (Small, Minority and Women) vendors whenever practical, in accordance with the agency's mission. CR-SDC will endeavor to bid to EBE/DBE's whenever and wherever possible. Bids can possibly be awarded to these vendors if they come within 5% of the lowest bidder and if the quality of the service or goods supplied is of at least equal quality compared to the other vendors. EBE/DBE's vendor must be certified to receive this 5% preference (the State of Wis., City of Mil. EBE.or Wis. Unified Certification Program).

**Certification documentation must be attached to proposal to qualify for points.**

**Statement of Certification**

The proposed activities, qualifications, dates, availability of resources, staff, cost, and all statements made are true and correct.

**Authorization Name/Title:** \_\_\_\_\_ (Print)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature)

**Debarment and Suspension**

Signature below acknowledges vendor identified on application has not been suspended, debarred, declared ineligible, or voluntarily excluded from eligibility by any Federal department or agency.

**Vendor's Authorized Representative Signature and Title**

\_\_\_\_\_