**REQUEST FOR PROPOSAL**

**COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION**

**Information Technology and Artificial Intelligence Infrastructure Assessment & Solutions**

**RFP #11-1320**

**Issued**

**Date: Friday November 13, 2020**

**Proposal must be received no later than**

**Date: Monday December 7, 2020**

**Community Relations – Social Development Commission**

**1730 W. North Avenue**

**Milwaukee, WI 53205**

**Attn: Scott Scherer, Purchasing Coordinator**

**RFP #11-1320**

**General Information**

The Community Relations-Social Development Commission (CR-SDC) of Milwaukee is seeking proposals for strategic planning facilitation 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.

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. SDC has determined that retaining the services of a skilled facilitator is essential in creating its strategic vision.

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

**Proposals will be accepted until 2:00 p.m. on Monday December 7, 2020**

Submittals relative to this Request for Proposal should be addressed to:

CR-SDC Purchasing Division

1730 W. North Avenue

Milwaukee, WI 53205

Information Technology and Artificial Intelligence Infrastructure Assessment & Solutions

RFP# 11-1320

**Written responses and all supporting materials must be submitted in one original plus seven (7) copies.**

**Scope of Services**

The Community Relations-Social Development Commission (CR-SDC) is seeking to secure the services of a credible Information Technology Professional Architect for the purpose assessing and informing the agency’s needs. CR-SDC needs a road map that shows what steps are needing to improve, sustain and compete in this new reality and current economic environment.

This Information Technology (IT) and Artificial Intelligence (AI) Plan will cover a short, medium and long-range strategic implementation timeline to help guide the SDC’s priorities and budget allocations.

**The road map should include the following**:

1. An overall deep dive assessment of CR-SDC IT and AI environment
2. Findings & Recommendations
3. Phased Plan for achieving the need to include a delivery schedule
4. Roadmap Assessment & Deliverables
5. Implementation & Training Plan
6. Full Integration & Operations Manual

**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? Please list expected outcomes
2. Please describe what you believe distinguishes an outstanding Infrastructure Technology

1. 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.

**Technical Scope:**

**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 Infrastructure Technology 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 IT Infrastructure road map documents developed under your guidance from other organizations.

1. Evidence of substantial knowledge and experience in facilitating successful IT infrastructure assessments and recommendation projects.

* What experience do you have leading IT infrastructure planning processes similar to what SDC is proposing?
* Do you have experience working with organizations similar in size, scope, and mission to SDC?

1. At least three (3) professional letters of reference/recommendation. The references should include Organization Name, Contact Person, Title, Address, Phone, and E-mail address.
2. **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.

1. **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.

1. **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: Friday November 20, 2020 2:00p.m. CT)**

To assist in the evaluation of potential Information Technology 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. 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.**

1. **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 Milw.EBE. or Wis. Unified Certification Program).

**Certification documentation must be attached to all copies to qualify for points.**

1. **Important Dates**

* Formal RFP Issued: Friday November 13,2020
* Deadline for Letter of Intent: Friday November 20, 2020 2:00p.m. CST
* Deadline for Submitting Written Questions: Wednesday November 25, 2020 2:00p.m. CST
* Proposal Submission Due Date: Monday December 7, 2020 2:00 p.m. ,CST
* Estimated Start Date: January 11, 2020 9am, CST

Proposals must be received no later than Monday December 7, 2020 2 p.m., CST.

**Late proposals will not be accepted.**

**Proposals will not be accepted via-email or fax. Proposals will be opened on Friday December 7, 2020 at 2:10 p.m. CST.**

**Please do not include material other than that requested. Additional materials may be discarded**.

1. **For Additional Information or Clarification**

All correspondence regarding this RFP must be conducted through e-mail with a telephone confirmation of receipt of message, and must be received by 2:00 p.m. CST, November 25, 2020 with RFP# referenced.

Contact for information or clarification:

**Community Relations – Social Development Commission**

**1730 W. North Avenue**

**Milwaukee, WI 53205**

**Attn: Scott Scherer, Purchasing Coordinator**

**(414) 906-2803**

[sscherer@cr-sdc.org](mailto:sscherer@cr-sdc.org)

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

1. **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 (see page nine (9) “Criteria Review”) 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.

1. **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.

1. 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.
2. 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: Maximum Points 110 *Points***

**STATEMENT OF QUALIFICATIONS:**

* 1. **Firm Experience & Area(s) of Expertise (25 points)**
  2. **Comprehensive Assessment Snap-Shot (50 points)**
  3. **Professional Project References & Samples (25)**

**REFERENCES /MINORITY-OWNED VENDOR: 10 points (maximum)**

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)

**• PROPOSAL CHECKLIST •**

**Cover Sheet** **with signature**: Original and seven (7) copies. The cover sheet should be the first page of the proposal.

**Statement** **of Qualifications**: Exhibit **A** - Original and seven (7) copies. Not to exceed two (2) typewritten pages, single-spaced, 10-point font or larger and 1-inch margins on all sides.

**Examples of Information Technology & Artificial Intelligence Infrastructure Assessment & Solutions:**

* Provide at least two (2) examples of adopted Information Technology & Artificial Intelligence Infrastructure Assessment & Solutions documents developed under your guidance from other organizations.

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

**References**: Three (3) professional letters of reference/recommendation. 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:

**Information Technology and Artificial Intelligence Infrastructure Assessment & Solutions**  RFP# 11-1320 printed on the front of the envelope.

All submissions must be physically received by 2:00 p.m. on **Friday December 7, 2020**

**REQUEST FOR PROPOSAL #11-1320**

**COMMUNITY RELATIONS – SOCIAL DEVELOPMENT COMMISSION**

**Information Technology and Artificial Intelligence Infrastructure Assessment & Solutions**

**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)

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(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**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_