



**Community Council of Greater Dallas
Request for Proposals
Strategic Planning Consultant**

ISSUANCE DATE: June 8, 2021

DELIVERABLES REQUESTED: Strategic Planning Consulting Services

DEADLINE: June 21, 2021

You are invited to submit a Proposal in accordance with the requirements of the solicitation contained herein. Proposals are to be submitted to Community Council of Greater Dallas (CCGD), emailed to Procurement@ccadvance.org no later than June 21, 2021 Your proposal must be signed by an official who is authorized to bind the offer and must contain a statement to the effect that the offer is firm for a period of at least 120 calendar days from the date of submission.

Proposals submitted must show the above proposal title. CCGD assumes no responsibility for unmarked or incorrectly marked envelopes or emails being considered for award.

This solicitation does not commit CCGD to award a contract, to pay any costs incurred in the preparation of a proposal in response to this request, or to procure or contract for the goods or services. CCGD reserves the right to accept or reject any or all proposals received as a result of this Request for Proposal (RFP), to negotiate with all qualified offerors, or to cancel in part or in whole this Request if it is in the best interest of CCGD to do so.

REQUEST FOR PROPOSAL

STRATEGIC PLANNING

CONSULTING SERVICES

PREPARED BY

COMMUNITY COUNCIL OF GREATER DALLAS

DATE: June 8, 2021

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Part 1: GENERAL INFORMATION

A. Key Events and Dates (Estimates)

1. Request for Proposals Issued: June 8, 2021
3. Deadline for Receipt of Formal Proposals: June 21, 2021, 12:00 noon
4. Commencement of Evaluations: June 22, 2021
5. Announcement of Award(s): June 25, 2021
6. Commence Contract Performance: July 1, 2021

B. Delivery of Proposals

Proposals in response to this Request for Proposal (RFP) must be received by CCGD no later than **12:00 noon on June 21, 2021**. Any proposals received after the scheduled date and time are immediately disqualified. Proposals must be emailed to: procurement@ccadvance.org.

C. Policy of Competition

CCGD conducts all procurement transactions in a manner providing full and open competition. This RFP identifies all evaluation factors and their relative importance. Technical evaluations will be made of all proposals received. Awards will be made to the responsible offerors and firms whose proposals are most advantageous to CCGD.

PART 2: SPECIAL INSTRUCTIONS AND CONDITIONS

A. Purpose

The purpose of this RFP is to solicit competitive proposals for providing consulting services to assist Community Council's Board of Directors in formulating and creating a strategic plan in accordance with ROMA principles. Services are on the Scope of Services attached hereto.

B. Presentations and Negotiations

Any offeror may be requested to make a virtual oral presentation of its proposal to CCGD after the proposal deadline. Such presentations provide an opportunity for the offeror to clarify its proposal and to ensure mutual understanding. Any presentations will be determined and scheduled solely by CCGD.

C. Open Records

Community Council is subject to the Texas Public Information Act, and its records are subject to

disclosure under the law. Therefore, unless documents you provide are marked confidential and are confidential as a matter of law, they may be disclosed to third parties under a proper Public Information request.

D. Affirmative Action

The contractor shall take all necessary affirmative steps to assure compliance with all federal and state requirements concerning fair employment and employment of the disabled, and concerning the treatment of all employees, without regard to discrimination by reason of race, color, religion, age, sex, national origin, or physical disabilities. The contractor will indemnify and hold CCGD harmless from all claims for damages from violations of state or federal law, and all cost and expenses, including Attorney's fees, arising from, or relating to such claims.

E. Conflict of Interest and Debarment

The contractor must certify that there is no conflict of interest, and it has not been debarred. Signed conflict of interest forms and Certification of Debarments must be submitted with proposal.

F. Format for Proposal

Proposals are to be prepared in a manner designed to provide CCGD with a straightforward presentation of the offeror's capability to satisfy the requirements of this RFP. Offerors must address the technical and logistical factors associated with the proposal. For more specific information on the required format, refer to Section 5 and Attached Scope of Services.

G. Contract Award

A contract shall be awarded to the responsible offeror whose proposal is determined to be most advantageous, taking into consideration the evaluation factors set forth hereinafter. However, the right is reserved to reject any and all proposals received, and in all cases CCGD will be the sole judge as to whether an offeror's proposal has or has not satisfactorily met the requirements of this RFP. CCGD may require several offerors selected to participate in negotiations, technical revisions, or other revisions to their proposals prior to contract finalization. Terms and conditions that are included in this RFP will be a part of all Contracts awarded.

H. Notice of Award

Notice of “Intent to Award Contracts” will be emailed to offerors, informing them of the success, or lack thereof, of their proposal to receive an award.

PART 3: EVALUATION CRITERIA

CCGD will take into consideration the following information in determining acceptance and approval of proposals. The proposal will be reviewed based on the following specific criteria.

1. Organization Capability and Experience 30%
 - General summary of Organization’s history
 - Number of years working with Non-Profits
 - Previous experience
 - Include summary resumes of key staff to be involved in project.
 - Include previous experience if any working with TDHCA funded Community Action Agencies
 - Three references with addresses and contacts

2. Cost Considerations 30%

3. Coverage of Requirements (See attachment “A” Scope of Services) 40%

The criteria listed above will be used to evaluate proposals. Submit a narrative that addresses each criterion. Submit additional information as desired. Failure to submit all information as required by this RFP may cause your proposal to be disqualified.

PART 4: SCOPE OF SERVICES

CCGD is looking for a consultant to help prepare for and facilitate a four (4) hour strategic planning session that is scheduled for July 24, 2021. The services included in this RFP are identified in detail on Attachment “A” Scope of Services.

PART 5: ORGANIZATION OF PROPOSAL DOCUMENTS

A. PROPOSALS MUST BE ORGANIZED AS FOLLOWS:

1. Signed cover letter from organization transmitting the proposal package emailed to: Procurement@ccadvance.org.
2. Proposed Services and a proposed timeline for services.
3. Summary Information Sheet. (Attachment B below)
4. Signed Conflict of Interest Form (Attachment C)
5. Signed Certificate of Debarment Form (Attachment D)
6. Proposed Budget
7. Specific information addressing each evaluation criteria.

ATTACHMENTS:

ATTACHMENT A: SCOPE OF SERVICES

ATTACHMENT B: SUMMARY INFORMATION SHEET

ATTACHMENT C: CONFLICT OF INTEREST FORM

ATTACHMENT D: CERTIFICATE OF DEBARMENT

ATTACHMENT A

SCOPE OF SERVICES

Strategic Planning Consulting Services:

1. Pre-planning meetings with CEO and selected staff to review history and other information concerning organization.
2. Review and assistance in revising ROMA logic models.
3. Pre-work, as necessary.
4. Preparation of agenda for 4-hour strategic planning session.
5. Facilitate strategic planning session in accordance with ROMA principles.
6. Preparation of strategic plan.
7. Review, revision and finalization of strategic plan in accordance with funder's requirements and meetings with CEO.

Date of Strategic Planning Session:

July 24, 2021, 10:00 a.m. to 2:00 p.m.

ATTACHMENT B
SUMMARY INFORMATION SHEET

SUMMARY INFORMATION SHEET
REQUEST FOR PROPOSAL

Organization's Name:

Address:

Contact Person:

Attach signed W-9

Total estimated cost \$ _____

NAME OF ORGANIZATION: _____

SIGNATURE AND TITLE: _____

DATE SIGNED: _____



NOTIFICATION OF CONFLICT OF INTEREST

I have read the Texas Administrative Code 40 TAC, Rule § 83.1 and hereby notify the Executive Director of the Community Council Greater Dallas of a conflict of interest I hold.

If there is not a conflict of interest or potential conflict of interest, please select "No" for both questions, and sign and date.

Does the Applicant have as an officer, director, employee, consultant, or owner (in whole or in part) who is:

1. Related to (see relationship key below) a current employee of the Community Council of Greater Dallas (CCGD) or a member of the CCGD Board of Directors?

No

Yes (if yes, please explain):

-
2. A person who is currently an employee of CCGD or a member of the CCGD Board of Directors or, a volunteer working within CCGD?

No

Yes (if yes, please explain):

I certify that the information above is complete, true, and correct to the best of my knowledge. I understand that lack of full, true, and complete disclosure may be grounds for withholding payment for delivery of service and may cause contract termination.

Signature of Authorizing Individual

Printed Name and Title

Date



CONTRACTOR CERTIFICATION

Contractor's Name: _____

**Certification Regarding
Debarment, Suspension, and Other Responsibility Matters
In Primary Covered Transactions**

1. The prospective contractor certifies to the best of its knowledge and belief, that it and its principals:
 - a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.
 - b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction.
 - c. Have not with a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property.
 - d. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission or any of the offense enumerated in paragraph (1)(b) of this certification; and
 - e. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name and Title of Authorized Representative: _____

Signature: _____ Date: _____