



REQUEST FOR PROPOSALS:

RFP#2020-01

EXECUTIVE COACHING AND LEADERSHIP TRAINING SERVICES

Request for Proposal (RFP) Cover Page

Solicitation Issue Date: Wednesday, May 6, 2020

Solicitation Closing Date: Friday, June 5, 2020

Solicitation Closing Time: 2:00 PM (EST)

Issued By: United Planning Organization (UPO)

Address: 301, Rhode Island Ave, NW, Washington, DC 20001

Telephone Number: 202-238-4600

UPO is a non-profit organization in Washington DC, founded in 1962 and exempt from state and federal taxes.

Responses must be received on or before **Friday, June 5, 2020**, by 2:00 PM (EST.) in the Procurement Office, UPO, 301 Rhode Island Avenue, NW, Washington, DC 20001.

Electronic Responses: Please submit your **Technical Proposal** to procurement@upo.org referencing “Executive Coaching & Leadership Training Services RFP #2020-01 –Technical” in the subject line.

Please submit **Pricing Proposal** separately to procurement@upo.org referencing “Executive Coaching & Leadership Training Services RFP #2020-01 – Pricing” in the subject line.

For questions/information, please email rhaque@upo.org referencing “Executive Coaching & Leadership Training Services RFP #2020-01” in the subject line. Questions/information must be emailed no later than **Friday, May 22, 2020** All questions received by the closing date will be answered within three (3) business days and will be posted on the UPO website.

UPO reserves the right to waive informalities or irregularities, to reject any or all proposals received, to accept the proposal deemed best for the organization, and/or request new proposals, if necessary.

Any objection to the above conditions must be clearly indicated in the proposals.

In compliance with this RFP and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

VENDOR IDENTIFICATION

Company Name:			
Address:			
Telephone:			
Email:			
Federal ID:			
Print Name	Title	Authorized Signature	Date

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I. PURPOSE OF THIS RFP

The United Planning Organization (UPO) invites proposals from qualified and competent firms, to provide Executive Coaching & Leadership Services to its executive leadership team.

The qualified firm will have an established track record in providing executive coaching (to individuals) and team coaching services to advance and refine the professional skills or to acquire new (additional) skills required to develop and lead a successful, effective agency (organization).

II. UNITED PLANNING ORGANIZATION

UPO is a 501(c) (3) private non-profit corporation and the designated Community Action Agency for the District of Columbia (DC), providing leadership, support and advocacy to empower low-income residents of Washington, DC to become self-sufficient and self-determined. UPO is a major Head Start grantee in the Nation's Capital spanning a period of 50 years.

UPO serves as Washington, DC's premier non-government human service organization that promotes self-sufficiency and brings innovative ideas to the problem of poverty throughout the city. UPO operates a wide array of special activities and offers many supportive and instructional services including:

- Head Start, Early Head Start, and other childcare programs that make measurable differences in the education of our youngest;
- Comprehensive youth services with scholarships for DC residents;
- Homelessness transportation services;
- Training programs designed to prepare participants for skilled employment;
- Weatherization services to make homes more energy efficient;
- Substance abuse treatment programs that assist individuals in overcoming their addictions;
- Tax preparation and e-filing community based tax preparation services;
- Housing Counseling services that help alleviate predatory lending; and
- Job placement and career development services.

III. CONTRACT PERIOD

The initial term of any contract resulting from this RFP shall be one (1) year: effective from July 1, 2020 (or from the date the contract is fully executed) to June 30, 2021.

There will be an option to renew for an additional one year term or fraction thereof, subject to review of performance and availability of funds.

IV. SCOPE OF SERVICES

Proposals must include plans for:

- One-to-one career development and success coaching for executive team members;
- Individualized coaching in areas such as setting and achieving professional development objectives, clarifying goals, gaining self-awareness, and leadership and communication skill building.

Coaching needs would be identified through a collaborative process.

The coaching timeframe for participants is as follows:

- One (1) year of Executive Coaching for the UPO President and CEO
- Six (6) months of individual and/or team coaching for the following UPO executive staff:-
 - Chief Impact Officer
 - Chief Operations Officer
 - Chief Financial Officer
 - VP of Early Learning
 - VP of Human Resources
 - VP of Office of Legal Affairs
 - Director of Affordable Housing

The successful proposer will:

- Describe the methods and tools used to assess an executive's knowledge, skills and abilities to identify needed coaching and professional development support for coaching and development;
- Provide detailed plan to Conduct one-on-one leadership coaching sessions with executive managers;
- Provide a detailed cost outline separately as Pricing Proposal;
- Include packaged or tiered pricing based on the number of coaching sessions provided and/or number of executives coached in a set period of time, if applicable.
- Evidence of demonstrated experience coaching executive management;
- Knowledge of non-profit work is highly desirable.

Proposals will be evaluated based upon the above-mentioned criteria, as well as assessments and comparisons that include evaluations of skills/experience, cost, client service and references, and/or other factors.

V. PROPOSAL REQUIREMENTS

A. GENERAL REQUIREMENTS

1. In order to be considered for selection, proposers must submit a complete response to this solicitation electronically to procurement@upo.org referencing “Executive Coaching & Leadership Training Services RFP #2020-01”.
2. No other distribution of the proposals shall be made by the proposer.

NOTE: A proposer may submit no more than one proposal in response to this RFP.

3. Proposals shall include a letter of transmittal signed by an authorized representative of the proposer. All information requested should be submitted. Failure to submit all requested information may result in the organization requiring prompt submission of missing information.
4. Proposals which are substantially incomplete or lack key information may be rejected by UPO.
5. Proposals should be prepared simply, as thorough and detailed as possible, providing a straightforward, concise description to satisfy the requirements of the solicitation. Emphasis should be placed on completeness and clarity of content.
6. All responses are to be submitted on standard 8.5” X 11” paper size in 12 point font minimum type. Proposers shall respond to the items in the order they are shown in the solicitation. The responses should describe the most favorable terms and shall remain firm for 90 days from the proposal opening date.
7. Prices should be submitted separately (Pricing Proposal), exclusive of all federal, state, and local taxes.
8. Ownership of all data, materials and documentation originated and prepared for this solicitation by any proposer shall belong exclusively to UPO.

B. SPECIAL REQUIREMENTS

All pages of the proposal should be numbered and should be addressed in the proposer’s response in the following order:

1. Letter of transmittal, signed by an authorized representative of the proposer.
2. Table of Contents, cross-referencing the contents of the proposal.
3. Completed, signed and dated Cover Page of this RFP.

4. A detailed proposal explaining experience and capabilities along with a statement that the proposer understands UPO's requirements.
5. Completed and signed Vendor Identification Form. Blank form included as an attachment (Appendix A) to this RFP.
6. A copy of the current business license.
7. A copy of the current certificate of liability insurance evidencing coverage of the minimum required in this solicitation.
8. Pricing Proposal - Provide an itemized breakdown of billing rates and hourly costs along with a list of key personnel and their hourly rates. Also provide any other fees or charges applicable.

VI. MISCELLANEOUS

1. UPO encourages the participation of persons of color, women, persons with disabilities and members of other federally and State-protected classes.
2. Describe your firm's affirmative action program and activities. Include the number and percentage of members of federally and State-protected classes who are either principals or senior managers in your firm, the number and percentage of members of federally and State-protected classes in your firm who will work on UPOs engagement and, if applicable, a copy of your Minority- or Women-Owned Business Enterprise state certification.
3. Discuss any topics not covered in this Request for Proposals that you would like to bring to UPO's attention.

VII. EVALUATION CRITERIA

1. All proposals will be reviewed to determine if they adhere to the format and instructions of the RFP, meet the criteria indicated below, and conform to the objectives and requirements of the RFP.
2. An evaluation team will evaluate the merit of proposals received in accordance with the criteria outlined in this RFP.
3. Incompleteness, significant inconsistencies or inaccuracies found within a response may result in a reduction of the evaluation rating.
4. UPO reserves the right to (a) waive variances or reject any or all proposals and (b) request clarifications from any or all proposers.
5. Proposals shall be rejected if they: (a) are received after closing date and time, (b) contain alterations not initialed by an authorized official, and (c) are not meeting the minimum qualification requirements.

6. The following criteria will be utilized in the evaluation of the proposals:
 - a. Adherence to RFP: The Proposer adheres to the instructions in this RFP on preparing and submitting the proposal.
 - b. Qualifications and experience: The Proposer's past experience and performance on comparable engagements.
 - c. Reasonableness of Cost: A total dollar amount for the service requested and a detailed breakdown must be provided with the proposal.

Technical proposal will carry 70% and pricing proposal will carry 30% of the total weightage.

VIII. GENERAL TERMS AND CONDITIONS

1. Additions and/or Deletions of Service: UPO reserves the right to add and/or delete goods or services to any contract entered into with the contractor. Should a requirement be deleted, payment to the contractor shall be reduced proportionally to the amount of service reduced in accordance with the bid price. Should additional services be required from the contract, prices for such additions will be negotiated between the contractor and UPO.
2. Termination of Contract: The contract may be terminated by either party at any time upon sixty (60) days written notice from the terminating party. Cancellation of the contract by either party shall in no way relieve the contractor of its responsibility to complete any and all work in progress at the time of the notice and for which payment has been received by the contractor.
3. Licenses: By submitting a proposal, proposer certifies that it has procured, and shall maintain in full force, all permits and licenses required to conduct its business lawfully and that it shall remain informed of and in compliance with all federal and local laws, ordinances and regulations that affect in any manner contractor's fulfillment of the contract.
4. Anti-Kickback Provision: This contract is subject to the provisions of the Anti-Kickback Enforcement Act of 1986. By agreeing to this binding agreement, the transacting parties (1) certify that they have not paid kickbacks directly or indirectly to any employee of UPO for the purpose of obtaining this or any other agreement, purchase order or contract from UPO and (2) agree to cooperate fully with any Federal Agency investigating a possible violation of the Act.
5. Non-Collusion/Fraud: By submitting a proposal, proposer warrants and certifies that neither the proposer nor its employees or associates has contacted any unauthorized UPO employee, officer or elected official regarding the contents of this solicitation or the solicitation process. Proposer further warrants and certifies that neither proposer nor its employees or associates has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in response to this solicitation. If at any time it shall be found that proposer or its employees or associates has, in the presenting of its proposal, colluded with any other party or parties for the purpose of preventing or restricting free

competitive bidding, its proposal shall be immediately rejected. Any contract awarded prior to the UPO's discovery of proposer's collusion shall be terminated and proposer shall be liable for all of its damages sustained by the UPO as a result of proposer's collusion.

6. Equal Opportunity: The proposer agrees not to discriminate against any employee or applicant for employment on account of any services, or activities made possible by or resulting from this RFP on the grounds of actual or perceived sex, race, color, religion, national origin, age, marital status, disability, personal appearance, sexual orientation, gender identity or expression, familial status, family responsibilities, matriculation, political affiliation, genetic information, source of income, place of residence or business, veteran status or any other characteristic protected under federal or District law. Any violation of this provision shall be considered a violation of a material provision of this agreement and shall be grounds for cancellation, termination or suspension in whole or in part of the agreement by UPO which may result in ineligibility for further UPO contracts. The proposer shall at all times in the proposal and contract process comply with all applicable UPO, DC, and federal anti-discrimination laws, rules, regulations and requirements thereof.
7. Right to Audit: UPO shall have the right to audit all invoices submitted by the contractor. The organization shall have the right to audit all relevant data upon which the contractor's fees are based.
8. Informal Communications: From the date of receipt of this RFP by each proposer until a binding contractual agreement exists with the selected contractor and all other proposers have been notified, or when UPO rejects all proposals, informal communications regarding this procurement shall cease. There shall be no requests from proposers to any Office or Department at UPO with the exception of contact for information, comments, etc., and they shall be emailed.
9. Formal Communications: From the date of receipt of this RFP by each proposer, until a binding contractual agreement exists with the selected contractor, and all other proposers have been notified, or when UPO rejects all proposals, all communications between UPO and the proposers will be formal emails.
10. Costs Incurred: Any costs incurred by proposers in preparing or submitting a proposal or subsequent oral presentation/demonstration shall be the proposer's sole responsibility.
11. Minority/Women-Owned Business Enterprises: Pursuant to Federal Acquisition Regulations and UPO's procurement policy, UPO may offer contracting opportunities to small and minority firms, women's business enterprises and labor surplus area firms to the extent possible.
12. Federal, State and Local Taxes: UPO is exempt from State and federal taxes. Such taxes shall not be included in quoted prices, but if any taxes are known by the contractor to apply, they shall be shown separately. If not so shown, they shall be considered an expense of the proposer and deemed a part of the quoted prices.
13. Payment Terms: Preferred invoice payment terms will be 2% 10, net 30 days from date of invoice. In the event there is a discrepancy between the order and the invoice,

payment terms shall be effective starting on the date the discrepancy is resolved. Monies due or to become due to the contractor under the contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor. At any time or times before final payment and three year thereafter, UPO may have the contractor's invoices or vouchers and statement of cost audited.

14. Indemnification: Contractor shall indemnify, protect, defend and hold harmless UPO, its directors, officers, employees, and representatives from and against any and all claims arising from or connected with: (1) any alleged or actual breach by the contractor or (2) any act or omission by the contractor and only to the extent such claim arises by negligence or intentional misconduct or as may be allowed under applicable law. Monies due or to become due to the contractor under the contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor.
15. Insurance: Contractor shall, at all times, at its own expense, obtain and carry comprehensive liability insurance including errors and omissions coverage, property damage insurance and workers' compensation insurance in adequate amounts. Contractor shall keep such insurance in force for the duration and term of this agreement. All certificates of insurance or evidence of insurance must contain a thirty (30) day written notice of any cancellation, change, or termination of coverage. The insurance required shall be obtained from insurance company (ies) licensed to do business in the District of Columbia and shall be kept in force for 90 days after the last payment under the contract.
 - O Workers' Compensation Insurance providing statutory limits for the District of Columbia.
 - O Business Automobile Liability Insurance with a minimum of \$1,000,000 per occurrence.
 - O Commercial General Liability Insurance coverage with a minimum of \$1,000,000 per occurrence / \$2,000,000 aggregate limit.

The contractor shall provide immediate notice in the event there is any change of insurance or that it has reached the insurance limits due to claims made.

16. RFP Addendum: In the event that it becomes necessary to revise this RFP, in whole or in part, an addendum will be posted on the UPO website:
<http://www.upo.org/work-with-us/#rfp>
17. Completed Proposals: A proposer may submit no more than one (1) proposal in response to this RFP. The proposal shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.
18. Withdrawal of Bids: At any time prior to the hour and date set for submitting proposals, a proposer may withdraw the proposal. This will not preclude the submission of another proposal prior to the hour and date set for submitting the bid. After the scheduled time and date for submitting proposals, no proposer will

be permitted to withdraw the bid unless the award is delayed for a period exceeding 60 days.

19. Receipt and Opening of Proposals: Proposers are responsible to assure their bid is delivered to UPO by the scheduled date and time. Only those bids which are received in a timely fashion as set forth in this RFP will receive consideration. Proposals received after the date and hour designated are automatically disqualified and will not be considered; late bids will be dated, marked as received late, and placed unopened in the bid file. Proposers must pay particular attention to insure the proposal is properly addressed. UPO is not responsible if the proposal does not reach the destination specified by the appointed date and time.
20. Contract Award Notification: When the evaluation process of the proposals is completed; the selected proposer will be formally notified by mail or email. Other notifications will not be honored and should not be considered as a valid offer of award.
21. Certifications: Any agreement resulting from this RFP shall be subject to but not limited to the following certifications:
 - a. Certification that it nor its principals are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any federal department or agency from participation in this transaction by any Federal department or agency in accordance with 45 CFR Part 76.
 - b. Certification Regarding Lobbying under Title 31, US Code, Section 1352.
22. By submitting a proposal, the proposer represents that:
 - a. The proposer has read and understands the RFP and submits the response in accordance therewith.
 - b. The proposer possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
 - c. The proposer has all the required licenses and insurance.
23. No claim will be allowed for additional compensation or time for completion based on a lack of knowledge or lack of understanding of any part of the RFP.



APPENDIX - A

VENDOR IDENTIFICATION (Must be completed and returned with the Proposal)

Company/Individual's Name:			
Doing Business As (DBA):			
Company Federal ID# or Social Security No :			
Address:			
Remit To Address:			
Telephone:			
Fax:			
Email:			
Web address:			
Main Contact Person:			
Person responsible for response (if different):			
Print Name	Title	Authorized Signature	Date