

REQUEST FOR QUALIFICATIONS

RFQ # 0027

**GRANT WRITING, RESEARCH &
DATA ANALYST SERVICES**

Cover Page

Proposal Issue Date: Friday, September 24, 2021			
Solicitation Closing Date: OPEN & CONTINUOUS		Solicitation Closing Time: OPEN	
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 agency in the District of Columbia and is exempt from any state or federal taxes.			
Unless otherwise stated, all quoted prices shall be Free On Board (FOB) headquarter address inside delivery.			
Responses must be received in the Procurement Office, United Planning Organization, 301 Rhode Island Ave, NW, Washington, DC 20001.			
Electronic responses: Please submit your proposal to procurement@upo.org referencing "Grant Writing, Research & Data Analyst Services - RFQ #0027" in the subject line.			
For questions/information, please email Rizwanul Haque, Procurement Officer, at rhaque@upo.org referencing "Grant Writing, Research & Data Analyst Services - RFQ #0027" in the subject line. All questions received will be answered within three (3) business days and will be posted on the UPO website.			
United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all qualifications 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 proposal.			
In compliance with this RFQ 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 / Individual's Name:			
Address:			
Telephone:			
Email:			
Federal ID/SSN #:			
Print Name	Title	Authorized Signature	Date

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I. PURPOSE

The purpose of this RFQ is to invite proposals and select qualified and experienced writers including grant writers, researchers, and data analysts to join its pool of qualified vendors for grant writing, research, and data analyst services.

The office of Resource Development and Research performs grant production and research services to ensure that UPO is adequately funded to carry out its mission and to ensure that resources are designated to programs based on needs that are supported by research.

II. CONTRACT PERIOD

Once selected as a qualified vendor, the term of any contract arising from this RFQ shall be for a period not to exceed twelve (12) months. The contract may be extended for another one-year period depending on satisfactory performance and availability of funds.

III. UNITED PLANNING ORGANIZATION (UPO) BACKGROUND

UPO was founded as a 501(c)(3) non-profit organization in 1962 and became the designated community action agency (CAA) for the District of Columbia in 1965. CAAs were born out of President Johnson's War on Poverty initiative in 1964 to assist people with low incomes to become self-sufficient. UPO's mission of *uniting people with opportunities* emboldens UPO to provide more than 20 human service programs to 50,000+ District residents per year including:

- Early Head Start services and training services to childcare providers throughout DC
- Youth out-of-school time services to K-12 students
- Housing services including emergency rental assistance (ERAP), housing counseling, and financial literacy training
- Free tax preparation services and e-filing of Income Tax Returns
- Transportation services for homeless families and individuals
- Vocational training programs in in-demand sectors including construction, health, early learning, hospitality, transportation, and more
- Job placement and career development services
- Substance use and abuse treatment and counseling services
- Foster grandparent volunteer services in schools across the District
- Community development and leadership training
- Affordable housing development
- Permanent Supportive Housing services
- Volunteer opportunities

These programs are designed to achieve the following goals of assisting families to:

- (1) become stable and economically secure
- (2) live in communities that are healthy and offer economic opportunities, and
- (3) have a stake in building opportunities in their communities.

To ensure that UPO is effectively meeting the identified needs of DC residents, UPO performs a comprehensive, District-wide community needs assessment every three years including conducting quantitative and qualitative research involving surveying and focus group facilitation. In addition, UPO performs needs assessment updates annually.

IV. SCOPE OF SERVICES

Selected vendors (individuals and business entities) will have the opportunity to perform one or more of the following services:

- **Grant writing services** may include, but are not limited to: prospecting potential grant-making sources for funding opportunities; drafting grant proposals for submission to private foundations, corporations, and local and federal government agencies; reviewing/evaluating final drafts for quality and submission compliance; managing grant application attachments; drafting support letters; reviewing budgets; and other tasks associated with submitting high-quality grant submissions. Typically, grant application submissions range from \$25,000 to \$1M or more.
- **Research writing services** may include, but are not limited to: developing and/or reviewing surveys and focus group questions; producing written analyses of quantitative and qualitative data; drafting white papers, case studies, and special-interest research projects; consulting on the production of research-based grant applications; reviewing and evaluating written research products; editing written products for content and mechanics; and designing research methodologies. Typical assignments may require anywhere from one week to more than one month to complete depending on scope and complexity of the project.
- **Data analyzing services** may include, but are not limited to: cleaning and analyzing quantitative and qualitative data sets; performing statistical analyses; producing data visualizations; producing applications that perform data collection functions; producing research methodologies involving data; and preparing reports that effectively convey trends, patterns, and predictions using relevant data. Typical assignments may require anywhere from one week to more than one month to complete depending on scope and complexity of the project.

V. QUALIFICATIONS

Each RFQ applicant may submit documentation demonstrating competency in one or more of the following specialty areas:

- Grant Writing
- Research Writing
- Data Analyzing

Each specialty area has specific qualifications and document submission requirements explained below. RFQ applicants applying for more than one specialty area must submit all required documents under each specialty area. **Please do not submit resumes.**

Grant writers must possess the following qualifications:

- At least three (3) years of demonstrated success in grant writing for federal, state/local or private funding
- At least a bachelor's degree in English, Humanities, Social Sciences, or any other related field.
- Experience writing grants in two (2) or more program areas listed in Section III above
- Demonstrated ability to write fluently to multiple audiences using appropriately cited sources
- Demonstrated ability to identify and align grant guidelines with mission-specific programs
- Ability to build strong, positive working relationships with diverse staff and stakeholders in order to gather and synthesize complex information
- Excellent project management skills with the ability to establish and meet tight deadlines, and to establish and manage multiple individuals on a grant team
- Personal dedication to fulfilling project objectives beyond expectations
- Accustomed to performing in a deadline-driven environment while working within set budget requirements
- Ability to work independently with discipline and focus under minimal supervision
- Ability to work with community-based partners and UPO staff to develop successful winning proposals

Researchers must possess the following qualifications:

- At least three (3) years of demonstrated success in conducting and writing about primary and/or secondary research
- At least a bachelor's degree in English, Humanities, Social Sciences, or any other related field.
- Experience converting qualitative and quantitative information into clear narratives that could be understood by multiple readers including lay readers
- Demonstrated ability to write fluently to multiple audiences using appropriately cited sources
- Demonstrated ability to synthesize complex information from primary and secondary sources and present it in visually compelling ways that are accessible to a range of audiences
- Ability to build strong, positive working relationships with diverse staff and stakeholders in order to gather, synthesize, and present complex information
- Excellent project management skills with the ability to establish and meet tight deadlines, and to work with multiple individuals on the UPO research team, and with other stakeholders as needed
- Personal dedication to fulfilling project objectives beyond expectations
- Accustomed to performing in a deadline-driven environment while working within set budget requirements
- Ability to work independently with discipline and focus under minimal supervision

Data Analysts must possess the following qualifications:

- At least three (3) years of demonstrated success in conducting data analysis for a nonprofit or government agency (preferred), or a for-profit entity
- At least a bachelor's degree in Business, Applied Sciences, Economics, Mathematics, Statistics, Data Science, or any other field with some study of data analysis
- Experience conducting advanced statistical analyses using STATA, SPSS, R, Python, or a similar platform
- Intermediate to advanced Excel and Microsoft Office Suite skills
- Demonstrated ability to analyze complex data from various sources and visually present them in accessible and compelling ways
- Ability to build strong, positive working relationships with diverse staff and stakeholders in order to gather, synthesize, and present complex information
- Excellent project management skills with the ability to establish and meet tight deadlines, and to work with multiple individuals on a team throughout UPO, and with other stakeholders as needed
- Personal dedication to fulfilling project objectives beyond expectations
- Accustomed to performing in a deadline-driven environment while working within set budget requirements
- Ability to work independently with discipline and focus under minimal supervision
- Preferred: experience conducting data analysis in the fields of social work, education, human development, human services, economics, public policy, public health, or similar sector
- Preferred: experience conducting data analyses in the one or more of the programs listed in section III
- Preferred: data visualization experience using Tableau or a similar platform
- Preferred: experience using GIS

The requirements of this solicitation will be evaluated based on the skills, knowledge, and experience of the respondent according to his/her content specific area(s). Respondents must demonstrate significant experience.

VI. SUBMISSION INFORMATION

Please submit one copy per specialty area of the RFQ responses to the requirements below in PDF format, with one-inch margins, 12-point font, and single-spaced. UPO reserves the right to interview prospective vendors, if deemed necessary.

For Grant Writing Consideration

Responses shall provide sufficient information necessary to effectively evaluate your experience, area(s) of expertise, and availability. Please submit the following information:

- **Content Area Preferences:** List the content-specific area(s) that you would like to be evaluated for grant writing services (see section III, and include any other areas not listed).
- **Summary of Qualifications:** Write a brief summary detailing your grant writing experience in your preferred content area(s) of expertise (one page maximum)
- **Relevant Grant Writing Experience:** Provide a detailed listing of recent grant writing projects within the last three (3) years including dates, funders' names, dollar amounts applied for, and brief explanations of awards and non-awards (two pages maximum)
- **Writing Sample:** Attach a writing sample of a response to a grant request including the question(s) being responded to. You may redact identifying information of clients, if appropriate (two pages maximum).
- **Availability:** Indicate your availability and capacity to work via:
 - Teleconference
 - Email
 - Videoconference (Zoom, Webinars, Skype, etc.)
 - Onsite at UPO Headquarters in Washington, DC
 - Offsite, including attendance at pre-bid conferences and site visits, etc.
- **Min. Rate/Hour:** State your base hourly rate for grant writing services, including hourly rate for any ancillary service(s). As specific grant writing opportunities arise, respondents may be requested to prepare a total bid price for grant writing services.
- **Technology:** Indicate your level of computer literacy and software you are most familiar with and proficient in using.
- **List of Clients and References:** Provide the names and contact information (email and telephone) of three (3) recent clients you have provided grant writing services for within the past three (3) years. These contacts will be used as references, and by submitting them you authorize UPO to contact these individuals and discuss your work.
- **Education:** List any academic achievements, professional licenses, special trainings, and academic institutional degree(s) earned and years obtained.

For Researcher Consideration

Responses shall provide sufficient information necessary to effectively evaluate your experience, area(s) of expertise, and availability. Please submit the following information:

- **Content Area Preferences:** List the content-specific area(s) that you would like to be evaluated for research writing services (see section III, and include any other areas not listed).
- **Summary of Qualifications:** Write a brief summary detailing your research experience in your preferred content area(s) of expertise (one page maximum)
- **Relevant Experience:** Provide a detailed listing of recent research projects within the last three (3) years. Include date, type of project, intended audience, type of data used and analyses performed (if any), and a brief summary of final products (two pages maximum)
- **Work Sample:** Attach a sample of your research writing work along with a short description of the overall task to give context to your work sample. The work sample

should convey only portions of work where you were the sole author. You may redact identifying information of clients, if appropriate (three pages maximum).

- Availability: Indicate your availability and capacity to work via:
 - Teleconference
 - Email
 - Videoconference (Zoom, Webinars, Skype, etc.)
 - Onsite at UPO Headquarters in Washington, DC
- Min. Rate/Hour: State your base hourly rate for research services, including hourly rate for any ancillary service(s). As specific research opportunities arise, respondents may be requested to prepare a total bid price for their services
- Technology: Please provide a listing which platforms you are proficient in using and level of proficiency (e.g., beginner, novice, intermediate, advanced, expert)
- List of Clients and References: Provide the names and contact information (email and telephone) of three (3) recent clients you have provided research services for within the past three (3) years. These contacts will be used as references, and by submitting them you authorize UPO to contact these individuals and discuss your work.
- Education: List any academic achievements, professional licenses, special trainings, and academic institutional degree(s) earned and years obtained.

For Data Analyst Consideration

Responses shall provide sufficient information necessary to effectively evaluate your experience, area(s) of expertise, and availability. Please submit the following information:

- Content Area Preferences: List the content-specific area(s) that you would like to be evaluated for data analysis services (see section III, and include any other areas not listed).
- Summary of Qualifications: Write a brief summary detailing your data analysis experience in your preferred content area(s) of expertise (one page maximum)
- Relevant Experience: Provide a detailed listing of recent data analysis projects within the last three (3) years. Include date, type of project, intended audience, type of data used and analysis performed, brief summary of final products (two pages maximum)
- Work Sample: Attach a sample of your work – either data analysis, data visualization, or some combination – along with a short description of the overall task to give context to your work sample. The work sample should convey only portions of work where you were the sole author. You may redact identifying information of clients, if appropriate (three pages maximum).
- Availability: Indicate your availability and capacity to work via:
 - Teleconference
 - Email
 - Videoconference (Zoom, Webinars, Skype, etc.)
 - Onsite at UPO Headquarters in Washington, DC
- Min. Rate/Hour: State your base hourly rate for data analysis services, including hourly rate for any ancillary service(s). As specific data analysis opportunities arise, respondents may be requested to prepare a total bid price for their services

- **Technology:** Please provide a listing which platforms you are proficient in using and level of proficiency (e.g., beginner, novice, intermediate, advanced, expert). In particular, please note your proficiency level using Excel, STATA, SPSS, R, and/or other data analysis and visualization platforms.
- **List of Clients and References:** Provide the names and contact information (email and telephone) of three (3) recent clients you have provided data analysis services for within the past three (3) years. These contacts will be used as references, and by submitting them you authorize UPO to contact these individuals and discuss your work.
- **Education:** List any academic achievements, professional licenses, special trainings, and academic institutional degree(s) earned and years obtained.

VI. SELECTION PROCESS

An evaluation committee will review all submitted information and will select the best qualified respondents to be listed among a pool of consultants that UPO will offer project-based opportunities, as the need arises. UPO staff will maintain a file of qualified respondents and will consider the summary of qualifications when selecting contractors for various grant writing, research, and data analysis opportunities. Vendors determined as “qualified” will be invited to bid on projects as they arise.

Note: All costs directly or indirectly related to the preparation of a response to this RFQ shall be the sole responsibility of the respondent of this RFQ and shall be borne by the same.

VII. GENERAL TERMS AND CONDITIONS

1. **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.
2. **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.
3. **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.

4. 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 RFQ 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.
5. Any costs incurred by proposers in preparing or submitting a proposal shall be the proposer's sole responsibility.
6. 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.
7. 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 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.
8. Indemnification: Proposer 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 proposer or (2) any act or omission by contractor and only to the extent such claim arises by negligence or misconduct or as may be allowed under applicable law. Monies due or to become due under a contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor.
9. RFQ Addendum: In the event that it becomes necessary to revise this RFQ, in whole or in part, an addendum will be provided on UPO website.
10. Completed Proposals: A proposer may submit no more than one (1) proposal in response to this RFQ. The proposal shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.
11. Withdrawal of Proposals: 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 proposal. After the scheduled time and date for submitting proposals, no proposer will be permitted to withdraw the proposal unless the award is delayed for a period exceeding 60 days.
12. Receipt and Opening of Proposals: Proposers are responsible to assure their proposal is delivered to UPO by the scheduled date and time. Only those proposals which are received in a timely fashion as set forth in this RFQ will receive consideration. Proposals received after the date and hour designated are automatically disqualified and will not be considered; late proposals will be dated, marked as received late, and placed unopened

in the proposal file. Proposers must pay particular attention to ensure the proposal is properly addressed..

13. Any agreement resulting from this RFQ shall be subject to but not limited to the following certifications:

- Certification that neither it nor its principals are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any Federal or District of Columbia department or agency from participation in this transaction by any Federal or District of Columbia department or agency.
- Certification Regarding Lobbying under Title 31, US Code, Section 1352.

14. By submitting a proposal, the proposer represents that:

- The proposer has read and understands the RFQ and submits the response in accordance therewith.
- The proposer possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
- The proposer has all the required licenses and insurance.

APPENDIX - A: Vendor Identification Form



Appendix A

VENDOR IDENTIFICATION (must be completed and returned with bid/proposal)

Company/Individual's Name:	-----		
Doing Business As (DBA):	-----		
Company Federal ID # or Social Security #:	-----		
Address:	-----		
Remit To Address:	-----		
Telephone:	-----		
Fax:	-----		
Email:	-----		
Web address:	-----		
Main Contact Person:	-----		
Person responsible for response (if different):	-----		
Print Name	Title	Authorized Signature	Date