



United Planning Organization

REQUEST FOR QUALIFICATIONS

FY 2021

Proposal Evaluation Services

RFQ # 0028

Cover Page

| | |
|--|---|
| Proposal Issue Date: Monday, October 4, 2021 | |
| Solicitation Closing Date: OPEN | 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 " Proposal Evaluation Services - RFQ #0028 " in the subject line. | |
| For questions/information, please email Rizwanul Haque, Procurement Officer, at rhaque@upo.org referencing " Proposal Evaluation Services - RFQ #0028* " 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 | |
| First Name: | |
| Middle Name: | |
| Last Name: | |
| Business Name (If Applicable): | |
| Address: | |
| Home/Business Telephone: | |
| Cell Telephone: | |
| Date of Birth: | |
| Email Address: | |
| EIN # (If Applicable): | |
| Signature | Authorized |
| | |

Table of Contents

| | | |
|-----|---|---|
| 1. | PURPOSE OF RFQ | 2 |
| 2. | CONTRACT PERIOD | 2 |
| 3. | ABOUT THE UNITED PLANNING ORGANIZATION (UPO)..... | 2 |
| 4. | MINIMUM QUALIFICATIONS | 3 |
| 5. | COMPENSATION | 3 |
| 6. | GENERAL REQUIREMENTS | 4 |
| 7. | APPLICATION SECTIONS AND SCORING | 4 |
| 8. | AWARD OF CONTRACT..... | 5 |
| 9. | GENERAL TERMS AND CONDITIONS | 5 |
| 10. | APPENDICES | 7 |

1. PURPOSE OF RFQ

The purpose of this solicitation (RFQ) is to invite applications for proposal evaluation services from eligible professionals and firms to assist UPO in reviewing proposals received in response to solicitations such as requests for proposals (RFPs) and invitations for bids (IFBs) issued by the organization (UPO).

2. CONTRACT PERIOD

Once selected as a qualified vendor, the term of any contract resulting 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 or fraction thereof, depending on satisfactory performance and availability of funds.

3. ABOUT THE UNITED PLANNING ORGANIZATION (UPO)

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.

4. MINIMUM QUALIFICATIONS

Persons or staff from the business/firms responding to this RFQ must not be currently employed by UPO and should meet the following minimum requirements:

- a) Possess at least a bachelor's degree and 3 or more years of relevant experience, OR possess a master's degree or higher.
- b) Have experience with federal, state, non-profit, or other grants.
- c) Have training and/or experience in one or more of the domains listed below:
 - Job Placement and Employment Services
 - Vocational Skills Training Services
 - Education and Cognitive Development Services
 - Income and Asset Building Services
 - Housing and Homelessness Prevention Services
 - Health and Social/Behavioral Development Services
 - Youth Services
 - Senior Services
 - Information Technology Projects
 - Business Consulting Services
 - Management Consulting Services
 - Real Estate Development and Management Services
 - Communications Services
 - Project Management Services
 - Event Coordination and Management Services
 - General Services

Knowledge of the Community Services Block Grant Program or Community Action is highly desirable but not required.

The role of qualified evaluators identified through this RFQ is to assist UPO in making informed decisions regarding which businesses, community based organizations, vendors and entities of other types best meet the requirements of solicitations (RFQs, IFBs, etc.) issued.

5. COMPENSATION

Qualified proposal reviewers/evaluators will be paid at a rate determined by the procuring manager. The rates paid require fully completed proposal evaluations for all proposals received and subsequent participation in a meeting of the evaluation panel for that solicitation. Attendance in-person or virtual (on video) at the panels group meeting is requirement for full compensation. Failing to attend evaluation panel review meetings following proposal evaluations will result in the payment a loss of 50% of the rate offered by the procuring manager per proposal reviewed.

6. GENERAL REQUIREMENTS

All applications are to be submitted on standard 8.5” X 11” paper in 12 point Times New Roman font. Applications should be single-sided and single spaced. Applicants shall respond to the items in the order they are shown in the RFQ. In order to be considered for selection, applicants must submit a complete and signed application. Failure to submit all information requested may result in the applicant being required to promptly submit missing information and/or being given a lowered evaluation on the application. Applications which are substantially incomplete or lack key information may be rejected by UPO.

Applications should be prepared as thoroughly and detailed as possible providing a straightforward, concise description of capabilities to satisfy the requirements of the RFQ so that UPO may properly evaluate applicant’s capabilities to provide the required service. Emphasis should be placed on completeness and clarity of content. Ownership of all data, materials and documentation originated and prepared for this RFQ by any applicant shall belong exclusively to UPO.

- Email submission of applications to procurement@upo.org is the only method of submission.
- No other distribution of applications shall be made by the applicant.
- An applicant may submit no more than one response to this RFQ.

7. APPLICATION SECTIONS AND SCORING

An internal review panel will evaluate received applications to determine completeness of submission, level of interest, educational background, relevant experience and references.

| APPLICATION SECTIONS | REQUIRED DOCUMENT | POSSIBLE POINTS |
|--|---|-----------------|
| RFQ COVER SHEET | COMPLETED AND SIGNED RFQ COVER PAGE | 5 |
| INTEREST | LETTER OF INTEREST | 10 |
| EDUCATIONAL BACKGROUND | COMPLETED EDUCATION FORM | 35 |
| RELEVANT EXPERIENCE | RESUME / CURRICULUM VITAE (CV) | 40 |
| REFERENCES | COMPLETED REFERENCE FORM (Full Name, Title, Relationship, Phone Number, Email) | 10 |
| TOTAL SCORED POINTS | | 100 |
| <i>There are a maximum of 100 points. UPO reserves the right to accept or reject any proposal.</i> | | |

The letter of interest **MUST** list the subset of domains of expertise of the applicant. See domains of expertise sought in the section labelled minimum qualifications.

Applicants are not required to have expertise in all domains listed above but must identify, in their letter of interest, the domains of expertise they wish to provide proposal evaluation services for. This level of detail will help to determine which proposals get assigned to qualified proposal evaluators who emerge successfully through this qualification process and receive an agreement from UPO. The resume or CV provided by applicants must be updated to the permit reviewers of applications received to assess expertise in the respective domains identified in the application.

8. AWARD OF CONTRACT

Applicants that score the highest or closer to the highest score will be recommended to UPO's Chief Impact Officer for a final decision. Selected applicants will be asked to provide a completed W9 form for the preparation of contracts by UPO Office of Legal Affairs and subsequent payment processing by UPO's Office of Finance.

9. 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.

10. APPENDICES

- A. Education Form
- B. Reference Form

APPENDIX A: EDUCATION FORM

| | |
|------------------------------------|--|
| Undergraduate College / University | |
| City, State | |
| Date of Graduation | |
| Major | |
| Degree Type | |

| | |
|----------------------|--|
| Graduate School | |
| University | |
| City, State | |
| Date of Graduation | |
| Major/Specialization | |
| Degree Type | |

| | |
|-----------------------|--|
| Other Graduate School | |
| University | |
| City, State | |
| Date of Graduation | |
| Major/Specialization | |
| Degree Type | |

LICENSURES, CERTIFICATIONS AND OTHER CREDENTIALS

Please indicate all current professional licenses and certifications you possess that relate to the position for which you are applying.

APPENDIX B: REFERENCE FORM

| 1 st Reference | |
|---------------------------|--|
| Full Name | |
| Title | |
| Organization | |
| Relationship | |
| Phone Number(s) | |
| Email Address | |

| 2 nd Reference | |
|---------------------------|--|
| Full Name | |
| Title | |
| Organization | |
| Relationship | |
| Phone Number(s) | |
| Email Address | |

| 3 rd Reference | |
|---------------------------|--|
| Full Name | |
| Title | |
| Organization | |
| Relationship | |
| Phone Number(s) | |
| Email Address | |