



United Planning Organization

REQUEST FOR QUALIFICATIONS (RFQ):

**THIRD PARTY PROGRAM
EVALUATION SERVICES**

RFQ # 0029

**COMMUNITY SERVICES BLOCK GRANT
FY 2022 CSBG**

Request for Qualification (RFO) Cover Page

RFQ Solicitation Issue Date: Friday, November 12, 2021			
RFQ Solicitation Closing Date: Open and Continuous (For early consideration, proposals may be submitted by December 10, 2021)		RFQ Solicitation Closing Time: Open & Continuous	
Issued By: United Planning Organization			
Address: 301 Rhode Island Avenue, NW, Washington, DC 20001			
Telephone Number: 202-238-4600			
United Planning Organization (UPO) is a non-profit agency in the District of Columbia founded in 1962 and is exempt from any state or federal tax.			
Please submit your response to procurement@upo.org referencing "Request for Qualifications: Third Party Program Evaluation Services - RFQ #0029."			
For questions/information, please email Rizwanul Haque, Procurement Officer at rhaque@upo.org , referencing "Request for Qualifications: Third Party Program Evaluation Services- RFQ #0029" All questions received will be responded within 3 business days.			
United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all proposals received, to accept the proposal(s) deemed best for the organization, and/or request new proposal(s), 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 or Individual Name:			
Address:			
Telephone:			
Email:			
Federal ID or Social Security Number:			
Print Name	Title	Authorized Signature	Date

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I. PURPOSE

United Planning Organization (UPO) is seeking qualified and experienced program evaluators and organizations that perform program evaluations to conduct third party evaluations in one or more, UPO programmatic domains in accordance with terms and conditions set forth in this RFQ, and any other terms and conditions in any contract subsequently awarded. Proposals from firms and individuals shall be selected and determined qualified if the personnel or firms whose resume/CVs - proposals are provided demonstrate expertise and program evaluation competency in one of the UPO's key program domains. Selections will be made following UPO's review of each response, considering the factors identified in this RFQ and any other factors that it considers relevant to serving the best interests of UPO.

II. CONTRACT PERIOD

The term of any contract resulting from this RFQ shall be for a period between the time of selection of qualified vendor (firm or individual) and September 30, 2022. Contracts awarded will not be extended or renewed for another term.

III. UNITED PLANNING ORGANIZATION (UPO) BACKGROUND

UPO is a 501(c) (3) private non-profit corporation and the designated Community Action Agency for the District of Columbia, 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 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
- Homeless transportation services
- Training programs designed to prepare participants for skilled employment
- Substance abuse treatment programs that assist individuals in overcoming their addictions
- Tax preparation services and e-filing
- Job placement and career development services
- Housing counseling services that help alleviate predatory lending

IV. SCOPE OF SERVICES

UPO is seeking firms and individuals that have expertise in conducting thorough program evaluations for human services programs that operate in one or more of the following programmatic domains:

- Workforce / Employment
- Workforce / Vocational Skills Training
- Affordable Housing

- Community and Legislative Advocacy and/or Volunteer Coordination
- Community Health
- Community Impact
- Community Reinvestment (Housing Counseling and Family/Individual Income Management & Financial Literacy)
- Early Childhood Education / Early Learning
- Youth Services

Selected third party evaluators will be retained to conduct a thorough program evaluation and to deliver a report to UPO's executive team. The evaluation will assess how program delivery and program designs respond to UPO's Community Needs Assessment, as well as how it responds to the findings of primary and secondary information available about the human services needs of DC residents who have low incomes. The program evaluation must also assess how UPO's current program design(s) and approach to service delivery within the specific human services domain in question compares with future trends in that field. Third party evaluators will be expected to conduct discovery, and also interview UPO program personnel, customers and key-stakeholders with the goal of producing a third party evaluation that effectively communicates gaps, recommendations and improvement advisories.

V. QUALIFICATIONS

A. Minimum Requirements

Evaluators (individuals or firms) responding to this RFQ must meet the following minimum requirements for the

- Provide a Business license (for firms only)
- Demonstrate that the personnel to be assigned to the project possess Master's Degree(s) that are relevant to the domain to be evaluated, and possess seven or more years of experience relevant to the domain.
- Demonstrate experience of working on either federal, state, private grants and human services within the domain to be evaluated.
- Demonstrate familiarity with community-based organizations and community-based programs.
- Demonstrate familiarity with SWOT analysis
- Demonstrate competency in producing analytical reports that identify strengths and opportunities

B. Desired Competencies

- Demonstrate familiarity knowledge of the Community Services Block Grant Program
- Demonstrate familiarity knowledge of Community Action and the Community Action Agencies that comprise its network
- Demonstrate familiarity knowledge of Results Oriented Management and Accountability (ROMA)
- Demonstrate familiarity knowledge of effective social services program design and research-driven/data-driven approaches to delivering high impact services to low-income individuals and families
- Demonstrate capability to provide insights relevant to organizational strategic planning.

VI. COMPENSATION

Qualified vendors will be invited to conduct initial discovery and to provide a pricing proposal schedule and/or proposal for the assessment to be conducted for each domain of competency for which they are selected. If the proposed pricing is accepted by the Chief Operating Officer and the Chief Impact Officer, the project shall be commissioned. If not, pricing schedules and/or proposals shall be invited from the next qualified vendor for comparison and selection. Vendors shall be paid equal quarterly amounts of the negotiated price at four mutually agreed key milestones of the commissioned project – inclusive of the delivery of a satisfactory written report of the third-party program evaluation completed.

VII. PROPOSAL REQUIREMENTS

A. General Requirements

1. In order to be considered for selection, proposers must submit a complete response to this RFQ electronically to procurement@upo.org.

NOTE: A proposer may submit no more than one (1) proposal in response to this RFQ.

2. Proposals shall be signed by an authorized representative of the proposer. All information requested should be submitted. Failure to submit all information requested may result in the organization requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by UPO.
3. Proposals should be prepared simply, as thorough and detailed as possible, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFQ so that UPO may properly evaluate proposer's capabilities to provide the required service. Emphasis should be placed on completeness and clarity of content.
4. All responses are to be submitted on standard 8.5" X 11" paper size in 12 point font minimum type.
5. Ownership of all data, materials and documentation originated and prepared for this RFQ by any proposer shall belong exclusively to UPO.

B. Special Requirements

1. All pages of the proposal should be numbered, and the following are typical documents and/or items that a successful proposer will be required to provide to UPO, and should be addressed in the proposal in the following order:
 - a. Current Business License (for firms only)
 - b. Current Certificate of Liability Insurance (for firms only)
 - c. Completed and signed RFQ Cover Page.

- d. Completed and signed Vendor Identification form included as an attachment (Appendix A) to the RFQ.
 - e. Signed letter of interest detailing qualifications to provide the services requested in this RFQ.
 - f. About the Firm/Evaluator: A write up that describes the organization, its history, its notable completed evaluations, and its capability to effectively complete program evaluations and produce a written report of the evaluation and its findings. The methodology and approach should also be described.
 - g. Current resume/CVs of each of the personnel who will be assigned to UPO's project and the specific domain of expertise of each. Domains to be indicated must be selected from this list:
 - Workforce / Employment
 - Workforce / Vocational Skills Training
 - Affordable Housing
 - Advocacy and/or Volunteer Coordination
 - Community Health
 - Community Impact
 - Community Reinvestment (Housing Counseling and Family/Individual Income Management & Financial Literacy)
 - Early Childhood Education / Early Learning
 - Youth Services

(Expertise demonstrated on resume/cv must match the domain to be evaluated to score high points)
 - h. List of at least three comparable work/client references to include organization name, brief description of the project, and contact person's name, telephone number, and email address: preferably including a community based non-profit organization.
 - i. Evidence of relevant work experience.
 - j. Information which the proposer desires to present that does not fall within any of the requirements of the RFQ should be attached at the end of the proposal and designated as additional material.
2. Proposals that are not organized in this manner risk elimination from consideration if the evaluation team is unable to find where the RFQ requirements are specifically addressed.

VIII. EVALUATION CRITERIA

- A. All proposals will be reviewed to determine if they adhere to the format and instructions of the RFQ, meet the minimum qualifications, submit the required information and documents, and conform to the objectives and requirements of the RFQ. Incompleteness, significant inconsistencies, or inaccuracies found within a response may result in a reduction of the evaluation rating.
- B. An evaluation team will review the responses received in accordance with outlined criteria and select the best qualified proposers to be among a pool of proposal evaluators for the FY 2022 CSBG Program Cycle.
- C. UPO reserves the right to (a) waive variances or reject any or all proposals and (b) request clarifications from any or all respondents. Further, UPO reserves the right to reject any or all proposals and to waive informalities and minor irregularities and to accept any portion of a proposal or all items proposed if deemed to be in the best interest of UPO.

IX. GENERAL TERMS AND CONDITIONS

- A. Any agreement resulting from this RFQ shall be subject to but not limited to the following certifications:
- Certification that it nor its principals are 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; and
 - Certification regarding Lobbying under Title 31, US Code, Section 1352.
- B. 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.
- C. 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 (except minimum age and retirement provision), 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.
- D. Informal Communications: From the date of receipt of this RFQ by each proposer until a binding contractual agreement exists with the selected contractor or when UPO rejects the 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 in writing, preferably via email.
- E. Formal Communications: From the date of receipt of this RFQ by each proposer, until a binding contractual agreement exists with the selected proposer, or when UPO rejects the proposals, all communications between UPO and the proposers will be in writing, preferably via emails.
- F. Any costs incurred by proposers in preparing or submitting a proposal shall be the proposer's sole responsibility.
- G. Any costs incurred by proposers in preparing or submitting a proposal shall be the proposer's sole responsibility.
- H. 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.
- I. State and Local Taxes: UPO is exempt from local, state and federal taxes.

- J. Contractor's Insurance and 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 contractor or (2) any act or omission by 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.

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 (if applicable).

- Workers' Compensation Insurance providing statutory limits for the District of Columbia.
- Business Automobile Liability Insurance with a minimum of \$1,000,000 per occurrence.
- 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.

- K. 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 <http://www.upo.org/about/requests-for-proposals-rfps/>
- L. 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 the individual or by the person who is authorized to bind the firm submitting the proposal.

By submitting a proposal, the proposer represents that:

1. Proposer has read and understands the RFQ and submits the response in accordance therewith.
2. The proposer possesses the capabilities necessary to provide an efficient and successful service.
3. The proposer has all required licenses and insurance (if applicable).

Appendix A

Vendor Identification Form



Appendix A

VENDOR IDENTIFICATION (must be completed and returned with proposal)

Company Name:	_____		
Doing Business As (DBA):	_____		
Company Federal ID:	_____		
Address:	_____		
Remit To Address:	_____		
Telephone:	_____		
Fax:	_____		
Email:	_____		
Web address:	_____		
Main Contact:	_____		
Person responsible for response (if different):	_____		
Print Name	Title	Authorized Signature	Date