



United Planning Organization

REQUEST FOR PROPOSALS:

RFP#2022-06

LEADERSHIP AND TEAM

DEVELOPMENT SERVICES

Request for Proposals (RFP)

Cover Page

Solicitation Issue Date: Friday, July 29, 2022

Solicitation Closing Date: Monday, August 29, 2022

Solicitation Closing Time: 2:00 PM (EST)

Issued By: United Planning Organization

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

Telephone Number: 202-238-4600

United Planning Organization (UPO) is a non-profit organization in Washington DC, founded in 1962, and is exempt from any state and federal taxes.

Responses must be received on or before Monday, August 29, 2022, by 2:00 PM (EST.) in the Procurement Office, United Planning Organization, 301, Rhode Island Avenue, NW, Washington, DC 20001.

Electronic Responses: Please submit your **Proposal** to procurement@upo.org referencing “**Leadership and Team Development Services - RFP#2022-06**” in the subject line.

DO NOT send any questions to this email address as this meant for receiving proposals only and it is not monitored regularly.

For questions/information, please email Rizwanul Haque, Procurement Officer at rhaque@upo.org, referencing “**Leadership and Team Development Services RFP#2022-06**” in the subject line. Questions/information must be emailed no later than Friday, August 12, 2022. All questions received by this date will be answered within three (3) business days and will be posted on the UPO website. Questions sent to procurement@upo.org will not be answered.

United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all bids received, to accept the bid deemed best for the organization, and/or request new bids, if necessary.

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

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

VENDOR IDENTIFICATION

Company Name:

Address:

Telephone:

Email:

Federal ID:

Print Name

Title

Authorized Signature

Date

Table of Contents

I. PURPOSE.....	4
II. CONTRACT PERIOD	4
III. UNITED PLANNING ORGANIZATION (UPO) BACKGROUND.....	4
IV. SCOPE OF WORK / SPECIFICATIONS	4
V. EVALUATION CRITERIA	6
VI. SOLICITATION REQUIREMENTS.....	6
A. General Requirements.....	6
B. Special Requirements	7
VII. AWARD OF CONTRACT	7
VIII. GENERAL TERMS AND CONDITIONS.....	8
<u>APPENDICES</u>	
Appendix A – Vendor Identification Form.....	11

I. PURPOSE

The United Planning Organization (UPO) invites experienced and qualified vendors to provide leadership coaching and development services per specifications, terms, and conditions as detailed in this RFP.

II. CONTRACT PERIOD

The term of any contract resulting from this solicitation shall be from September 1, 2022 (or from the date the contract is executed) to September 30, 2023, with option to renew for one year maintenance/warranty agreement.

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;
- Free Tax preparation and e-filing
- Affordable housing development
- Job placement and career development services.

IV. SCOPE OF WORK / SPECIFICATIONS

1. Project Description

UPO's Middle Management team comprises Division Directors who report to the Executive Vice President and the Vice President of Operations. These Directors span the spectrum in terms of level of leadership, management and supervision experience and capabilities. The vendor will provide group leadership development as well as one-on-one leadership development coaching to the group of Directors that reports to the Executive Vice President and separately to the group that reports to the Vice President of Operations. Executive Assistance coaching and one-on-one professional development will also be provided to three executive assistants who serve the Executive Vice President, the Vice President of Operations and the Chief Executive Officer. Altogether leadership development will be provided to the following:

- One Executive Vice President
- One Vice President of Operations
- Sixteen Division Directors
- Three Executive Assistants

A preliminary assessment of Division Directors suggested that increased competency in the following areas are desired by the group:

Engagement Outcomes

- Improved Capability to Exercise Active Listening Skills
- Improved Awareness of Emotional Intelligence Factors and Considerations
- Improved Awareness of Social Intelligence Factors and Considerations
- Improved Communication Skills
- Improved Ability to Develop Team Members and Create Opportunities for Growth
- Improved Ability to Cultivate Team Member Capabilities
- Improved and Well-Rounded Leadership Skills
- Growth in Leadership Mindset
- Improved Capability to Initiate or Engage in Strategic Collaboration
- Improved Capability to Supervise Effectively and to Utilize Effective Supervision Skills
- Improved Capability to Undertake Progressive Discipline of Team Members
- Equipped with Practical Approaches for Team Building
- Equipped with Practical Approaches for Motivating Different Types of Team Members
- Equipped with Practical Approaches for Setting Priorities
- Equipped with Practical Approaches for Delegating and Monitoring Delegated Work Delivery
- Increase Awareness of, and Capability for, Maintaining Personal Life Balance as a Leader
- Improved Capability to Work Effectively with Cross Functional Teams
- Improved Capability to Work Effectively with Team Members of Diverse Backgrounds
- Increased Team Cohesion and Greater Number and Diversity of Collaborations on the Team
- Increased capacity of Individual Team Members to Manage their Time Effectively

Format

Directors and Executive Assistants

- Group Coaching
- One on One Coaching
- Periodic Consultation

Broader UPO Middle Management Staff

- Periodic High Impact Brief Training/Presentation Sessions in Management Meetings

2. Proposal Structure

The proposer shall provide a table of contents, description of services to be provided, format of services to be provided, model of group coaching, model of one-on-one coaching, profile of coaches who will deliver services, experience of each coach, format of presentation to broader middle management staff, and any additional information and insights that enable UPO to understand services to be offered as well as to make an informed decision after comparing competing proposals.

3. Proposal Pricing

The proposer shall provide pricing information with sufficient information for UPO to compare competing proposals. The pricing information shall breakdown the entire project price to facilitate the ease of comparison and selection.

V. 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 or fail to demonstrate capacity and past experience providing similar services to similar organizations.
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.

VI. SOLICITATION REQUIREMENTS

A. General Requirements

1. In order to be considered for selection, proposers must submit a complete response to this RFP through email addressed to procurement@upo.org. No other distribution of the proposals shall be made by the proposer.
2. **NOTE: A proposer may submit no more than one (1) proposal in response to this RFP.**

3. 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. Proposals which are substantially incomplete or lack key information may be rejected by UPO.
4. Proposals should be prepared simply, as thorough and detailed as possible, providing a straightforward, concise description to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
5. All responses are to be submitted on standard 8.5" X 11" size in 12 font minimum type. Proposals should not be double-sided. Proposers shall respond to the items in the order they are shown in the RFP. The responses should describe the most favorable terms and shall remain firm for 90 days from the proposal opening date.
6. Proposers must include total pricing and a breakdown of the total price by component parts and/or categories.
7. All documentation submitted with the proposals should be contained in one single volume.
8. Ownership of all data, materials and documentation originated and prepared for this RFP by any proposer shall belong exclusively to UPO.

B. Special Requirements

All pages of the proposals should be numbered, and the following are typical documents that a successful proposer will be required to provide to UPO, if awarded the contract, and should be addressed in the proposer's response in the following order:

1. Signed Letter of interest detailing qualifications to provide the material requested in this RFP.
2. Table of Contents, cross-referencing the contents of the proposal.
3. Completed, signed, and dated RFP Cover Page.
4. Completed, signed, and dated Vendor Identification Form, included as an attachment (Appendix A).
5. Pricing page(s).
6. Copy of current business license to operate in the District of Columbia.
7. Copy of current certificate of insurance evidencing coverage of the minimum required in this RFP.
8. Three comparable work/client references to include organization name, brief description of the project, and contact person's name, telephone number, and email address.

VII. AWARD OF CONTRACT

Technical proposal will carry a weightage of 70% and pricing proposal will carry 30% during the evaluation of all received proposals. Only technically qualified proposals will be considered for their price evaluations. The highest ranked proposer with combined scores of technical and pricing evaluations will be awarded the contract.

VIII. GENERAL TERMS AND CONDITIONS

1. **Additions and/or Deletions of Goods or Services:** UPO reserves the right to add and/or delete goods or services to any contract entered with the contractor. Should a requirement be deleted, payment to the contractor will be reduced proportionally to the amount of goods or services reduced in accordance with the proposed price. Should additional goods or 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 bidder 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 bidder.
3. **Licenses:** By submitting a proposal, bidder 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 bidder'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, bidder warrants and certifies that neither bidder 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. Bidder further warrants and certifies that neither bidder 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 bidder 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, bidder's proposal shall be immediately rejected. Any contract awarded prior to the UPO's discovery of bidder's collusion shall be terminated and bidder shall be liable for all of its damages sustained by the UPO as a result of bidder's collusion
6. **Equal Opportunity:** The bidder 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 Solicitation 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 bidder 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 bidder. The organization shall have the right to audit all relevant data upon which the bidder's fees are based.

8. Informal Communications: From the date of receipt of this solicitation by each bidder until a binding contractual agreement exists with the selected bidder and all other bidders have been notified, or when UPO rejects all proposals, informal communications regarding this procurement shall cease. There shall be no requests from bidders 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 solicitation by each bidder, until a binding contractual agreement exists with the selected bidder, and all other bidders have been notified, or when UPO rejects all proposals, all communications between UPO and the bidders will be formal emails.
10. Costs Incurred: Any costs incurred by bidders in preparing or submitting a proposal shall be the bidder'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 bidder to apply, they shall be shown separately. If not so shown, they shall be considered an expense of the bidder and deemed a part of the quoted prices.
13. Payments 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 years thereafter, UPO may have the contractors' 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 bidder 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.
 - 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.

16. Solicitation Addendum: In the event that it becomes necessary to revise this Solicitation, in whole or in part, an addendum will be provided on our website <http://www.upo.org/work-with-us/#rfp>.
17. Completed Proposals: A bidder may submit no more than one (1) bid in response to this Solicitation. The bid shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.
18. Withdrawal of Proposals: At any time prior to the hour and date set for submitting proposals, a bidder may withdraw the bid. This will not preclude the submission of another bid prior to the hour and date set for submission. After the scheduled time and date for submitting proposals, no bidder will be permitted to withdraw the bid unless the award is delayed for a period exceeding 60 days.
19. Receipt and Opening of Proposals: Bidders 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 Solicitation will receive consideration. Bids 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. Bidders must pay particular attention to ensure the proposal is properly addressed. ***UPO is not responsible if the proposal does not reach destination specified by the appointed date/time.***
20. Contract Award Notification: When the evaluation process of the proposals is completed, the selected bidder 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. Contract Administration: UPO shall be responsible for administration of the contract for compliance with the interpretation of scope, schedule, and budget. Contact information will be provided upon award of the contract.
22. Certifications: Any agreement resulting from this solicitation shall be subject to but not limited to the following certifications:
 - Certification that it or 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.
 - Certification regarding lobbying under Title 31, US Code, Section 1352.
23. Substantive Proposal: The proposer shall certify that: (a) the proposal is genuine and is not made in the interest of, or on behalf of, any undisclosed person, firm, or corporation. (b) they have not directly or indirectly induced or solicited any other proposer to put in a false or sham offer; and (c) they have not solicited or induced any other person, firm, or corporation from proposing.
24. Governing Law: Any contract between UPO and the successful proposer responding to this RFP shall be governed by and enforced in accordance with the laws of the District of Columbia, without regard to the Conflicts of Laws provisions. The place of performance and the transaction of business under such contract shall be deemed to be the District of Columbia and the exclusive venue and place of jurisdiction.
25. By submitting a proposal, the bidder represents that:
 - The bidder has read and understands the Solicitation and submits the response in accordance therewith.
 - The bidder possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
 - The bidder has all required licenses and insurance.
26. 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 this solicitation.



United Planning Organization

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