



**United Planning Organization**

# **REQUEST FOR QUALIFICATIONS**

**FY 2022**

**Strategic  
Planning Process  
Facilitation  
Services**

**RFQ # 0030**

## Request for Qualification (RFQ) Cover Page

<b>Solicitation Issue Date: Thursday, July 22, 2021</b>			
<b>Solicitation Closing Date: OPEN</b>		<b>Solicitation Closing Time: OPEN</b>	
<b>Issued By: United Planning Organization</b>			
<b>Address: 301 Rhode Island Avenue, NW, Washington, DC 20001</b>			
<b>Telephone Number: 202-238-4600</b>			
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 taxes.			
Submit your proposal to <a href="mailto:procurement@upo.org">procurement@upo.org</a> referencing “ <b>Strategic Planning Process Facilitation Services - RFQ #0030</b> ”. Do not send any questions to this email address as this is meant for receiving proposals only and it is not monitored regularly.			
For questions/information, please email Rizwanul Haque, Procurement Officer at <a href="mailto:rhaque@upo.org">rhaque@upo.org</a> , referencing “ <b>Strategic Planning Process Facilitation Services - RFQ #0030</b> ” All questions received will be responded within 3 business days and posted on the UPO website.			
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.			
<b>VENDOR IDENTIFICATION</b>			
Company or Individual Name:			
Address:			
Telephone No:			
Email Address:			
Federal ID or Social Security Number:			
<b>Print Name</b>	<b>Title</b>	<b>Authorized Signature</b>	<b>Date</b>

## Table of Contents

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

## **1. PURPOSE OF RFQ**

The purpose of this solicitation (RFQ) is to invite proposals for the provision of strategic planning process facilitation and support services from eligible professionals, consultants and firms. The selected provider will support UPO with strategic plan process and development facilitation services.

## **2. CONTRACT PERIOD**

Once selected, the term of any contract resulting 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 assist 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.

UPO's current 5 year strategic plan will end in September 2023. Between now and then, UPO will be engaged in developing the next strategic plan which will cover a three-year period as opposed to a five year period. The organization has developed a preliminary plan for the strategic

plan development process which necessitates a facilitator. The vendor selected will serve in this capacity and will be invited to review and offer improvements to the current preliminary plan.

#### **4. MINIMUM QUALIFICATIONS**

Individuals or staff from businesses/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 that enables or qualifies them to provide highly specialized and high value strategic plan development facilitation services. Prior experience leading multimillion dollar human services organizations in the process of developing impactful strategic plans is desired.

The role of the vendor selected through this RFQ is to facilitate the process of developing a transformative strategic plan that is heavily focused on customer and community impact.

#### **5. COMPENSATION**

Proposers are required to describe their proposed compensation structure along with total compensation expectations and must include any details that will be necessary for the comparison of cost with other vendor proposals. UPO will require completed strategic planning process facilitation and delivery of completed strategic plan prior to final payment. Failing to follow guidelines specified in the resulting agreement issued by UPO will result in contract or project termination depending on severity.

#### **6. GENERAL REQUIREMENTS**

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

Proposals 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 proposer'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 proposer shall belong exclusively to UPO.

- Email submission of proposals to [procurement@upo.org](mailto:procurement@upo.org) is the only method of submission.
- No other distribution of proposals shall be made by the proposer.
- A proposer may submit no more than one response to this RFQ.

## 7. PROPOSALS SECTIONS AND SCORING

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

PROPOSALS 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 (Appendix-A)	35
RELEVANT EXPERIENCE	RESUME / CURRICULUM VITAE (CV)	40
REFERENCES	COMPLETED REFERENCE FORM (Appendix-B) (Full Name, Title, Relationship, Phone Number, Email)	10
<b>TOTAL SCORED POINTS</b>		<b>100</b>
<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 proposer. See domains of expertise sought in the section labelled minimum qualifications.

Proposers 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 Strategic Planning Process Facilitation 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 proposers must be updated to the permit reviewers of proposals received to assess expertise in the respective domains identified in the proposals.

## 8. AWARD OF CONTRACT

Proposers that score the highest or closer to the highest score will be recommended to UPO's Chief Impact Officer for a final decision. Selected proposers 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 proposer 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 <sup>st</sup> Reference	
Full Name	
Title	
Organization	
Relationship	
Phone Number(s)	
Email Address	

2 <sup>nd</sup> Reference	
Full Name	
Title	
Organization	
Relationship	
Phone Number(s)	
Email Address	

3 <sup>rd</sup> Reference	
Full Name	
Title	
Organization	
Relationship	
Phone Number(s)	
Email Address	