



United Planning Organization

REQUEST FOR PROPOSALS

RFQ #0043

ALL STAFF UPO CONFERENCE

WORKSHOP PRESENTERS

COVER PAGE

Solicitation Issue Date: Friday, June 20, 2025			
Solicitation Closing Date: Friday, July 18, 2025		Solicitation Closing Time: 2:00 PM (EST)	
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			
Responses must be received by UPO Procurement Office on or before Friday, July 18, 2025 by 2:00 PM (EST)			
Electronic responses: Please submit your proposal to procurement@upo.org referencing “ALL STAFF UPO CONFERENCE – WORKSHOP PRESENTERS” in the subject line. <i>DO NOT send questions to this email address. This is for receiving proposals only and this is not monitored on regular basis.</i>			
For questions/information, please email at rhaque@upo.org referencing “ALL STAFF CONFERENCE – WORKSHOP PRESENTERS” in the subject line. Your questions will be answered within three (3) business days and will be posted on the UPO website. Questions/information must be emailed no later than COB on Monday, July 7, 2025 <u>Questions sent to procurement@upo.org will not be answered.</u>			
Payment Term: N/30 – after receipt of invoice by the Accounts Payable Office of UPO’s Finance Division.			
United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all proposals 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 Name:			
Address:			
Telephone:			
Email:			
Federal ID#:			
Print Name	Title	Authorized Signature	Date

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I. PURPOSE: REQUEST FOR QUALIFICATION (“RFQ”)

The United Planning Organization (UPO) is seeking Consultants, Presenters and Workshop leaders to participate and facilitate workshops for an agency wide – All Staff Conference on October 9, 2025, and October 10, 2025, in the Washington, DC area. The Conference is focusing on Leadership and Staff Development. Internal Networking, Customer Service, and the trends of community action and servicing low-income individuals are the most obvious motivation for the staff to attend the conference.

The purpose of this Request for Qualification (RFQ) is to solicit proposals from qualified and experienced consultants (either organizations or individuals) qualified to conduct this type of thorough Workshop/Training Facilitation. Likewise, these consultants should provide a focus to achieve exchanging information, conducting team building exercises, ensuring consistency and access to training materials and information, teaching and building upon United Planning Organization (UPO) culture and community, helping staff to gather and implement ideas, and help drive and connect alignment with UPO’s mission. The workshops will be conducted for all levels of leadership, management, and staff. The agency staff is designed in such levels and groups including:

- Executive Levels, Senior Vice Presidents
- Executive Assistants, Administrative Assistants, Program Assistants, Receptionists
- Division Directors, Assistant Division Directors, Mid – Level Directors, Program Managers and Supervisors
- Financial Managers, Financial Assistants,
- IT Specialists, Data Specialists
- Teachers, Day Care Directors, Child Care Aids/Assistants
- Commercial Drivers

II. BACKGROUND: UNITED PLANNING ORGANIZATION (UPO)

UPO is a 501(c)(3) private non-profit corporation and the designated Community Action Agency for the District of Columbia (DC). UPO specializes in providing economic security support services and human services to DC residents who have low income, and also supports and advocates to empower them to achieve economic security.

UPO promotes economic security by bringing innovative ideas to the problem of poverty throughout the city. UPO is governed by a board of 21 members, serves 50,000 customers annually, works with hundreds of partners and volunteers, and mobilizes a staff of 400 to operate a wide array of supportive and instructional services including:

- a. Early Head Start and other childcare programs that make measurable differences in the education of our youngest and their families.
- b. Job placement and career development services
- c. Job and vocational training via the Workforce Institute
- d. Comprehensive youth services with scholarships for DC residents

- e. Homeless transportation services
- f. Training programs designed to prepare participants for skilled employment.
- g. Substance abuse treatment programs to treat and overcome addictions.
- h. Tax preparation and e-filing community-based tax preparation services
- i. Housing counseling services that help alleviate predatory lending, avoid foreclosures, and prepare customers for home ownership.
- j. Affordable housing partnerships, permanent supportive housing, and resident services

III. UPO PROJECT GOALS

1. To provide a platform for leadership to communicate important information to the entire UPO Workforce ensuring everyone receives the same trends and trainings at the same time.
2. The conference will help align staff with the UPO mission, vision and strategic goals, ensuring everyone is working towards the same objectives.

IV. MINIMUM REQUIREMENTS

Staff from business firms or independent consultants responding to this RFQ must not be currently employed by UPO and should meet the following minimum requirements.

UPO will review each proposal to determine which one, if any, is the most advantageous one to fit its needs. Required qualifications for consultants are detailed below. Respondents must demonstrate competence and experience in one or more of the following domains:

- Organizational Change and Transition
- Compassion Fatigue & Vicarious Trauma for Helping Professions
- Health and Wellness
- Managing Difficult Situations and Conflict Management
- Emotional Intelligence
- Time Management: Managing Multiple Priorities & Projects
- Professional Ethics
- Artificial Intelligence
- Leadership Development 101
- Project Management 101
- Team Building Skills & Activities
- Effective Coaching for Managers, Supervisors
- Advocacy & Story Telling Impact
- Motivational Interviewing
- Communication & De-escalation Skills
- Customer Crisis Intervention
- Professional & Business Writing (Emails, Memos, all correspondence)
- Customer Service 101 for Community Action

Knowledge of the Community Services Block Grant (CSBG) Program or Community Action is highly

desirable but not required.

V. CONTENT OF PROPOSAL

The proposal should completely, but succinctly, provide responses to items **A** through **F** below. There is no page limitation on attachments.

A. Background Information

General history and background of your company. If available, provide your company's brochure or other marketing information.

B. Personnel and Staffing

1. State the staff size and composition of your company. Identify the staff and other personnel who will be assigned to this project; including their personal biographies and experiences as related to this type of work.

2. State the extent to which any relevant services similar to those outlined in this RFQ have been undertaken by your company and if assigned personnel participated in those assessments.

C. Scope of Services

Submitted proposals must comprehensively address the ability of the proposer to address the UPO Project Goals (Section III) of this RFQ and provide the following:

1. Comprehensive project timeline, work plan and budget
2. Provide a table of contents, description of services to be provided, format of training/workshop and how it will be presented

D. Statement of Expertise and Experience

1. Detail your company's capabilities and qualifications to provide services to meet the requirements of the RFQ.
2. List the relevant engagements in which your company has participated in the past three (3) years. This should be in the form of a brief narrative with a listing of the transactions. Any listing should indicate the role of your company and whether the individuals that would be assigned to the UPO account participated in that prior engagement.
3. Evidence of demonstrated experience presenting workshop/presentation/training.
4. Demonstrated knowledge of non-profit work environment, if applicable.

E. Fees and Expenses

1. Provide a budget and fee structure. Include a total cost of the workshops/presentation or training, as outlined (all inclusive).

2. Present UPO with detailed invoices for services rendered as it will be outlined in a subsequently executed contract.

F. References

Provide a minimum of three references, preferably other community-based non-profit agencies and/or non-profit 501(c)(3) organizations with federal funding. Include contact person's name, mailing address, e-mail address, telephone, and fax numbers.

VI. QUALIFICATION REQUIREMENTS

Staff from the business firms or independent consultants responding to this RFQ must not be currently employed by UPO and should meet the following minimum requirements.

1. Experience presenting and facilitating workshops and trainings.
2. Experience working in a Non-Profit Environment, working with a Community Action Agency is a plus.
3. Certifications or degrees in the areas of Social Work, Counseling, Sociology, Psychology, Social Science or related field
4. Bachelor's Degree or higher in Social Work, Psychology, Counseling, Counseling Psychology or related field.
5. Experience and capacity to complete outcomes outlined in RFQ.
6. Experience with similar projects of similar size and scope.
7. Experience and ability to complete the training/workshops within a fixed time frame.
8. Possess customer-oriented skills and be able to motivate people
9. Public Speaking Skills

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 referencing "**ALL STAFF UPO CONFERENCE – WORKSHOP PRESENTERS RFQ**" (RFQ# 0043) in the subject line. No other distribution of the proposals shall be made by the proposer.
2. Proposal 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 given a lower 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 services. Emphasis should be placed on completeness and clarity of content.

4. Proposers shall respond to the items in the order they are shown in the RFQ.
5. Ownership of all data, materials and documentation originated and prepared for this RFQ by any proposer shall belong exclusively to UPO.
6. If vendor is chosen, throughout contract period, vendor will submit to UPO monitoring, be responsible for detailed written and verbal reporting as requested and will meet with UPO team members at least twice a month. Vendor will prepare and deliver a final power point presentation regarding participants in program, outcomes reached, quantitative and qualitative data, and success story highlights.

B. Special Requirements

All pages of the proposal should be numbered, and should be addressed in the proposal in the following order:

1. Completed and signed RFQ Cover Page.
2. Completed and signed Attachments as detailed in Section V: A - F (Content of Proposal).
3. Completed and signed Vendor Identification Form.
4. Copy of current Business license(s) and certifications.
5. Copy of current Certificate of Liability Insurance.
6. Completed and signed W-9 Form.
7. Completed and signed ACH Form.

VIII. EVALUATION CRITERIA

Proposals will be evaluated on a variety of factors including the quality of the proposal and experience with similar programs.

The Proposer's overall methodology and approach to successfully providing the Scope of Services will be evaluated. Proposals will be evaluated on, but not limited to the following:

- Responsiveness to Section IV - Project Goals.
- Experience assessing Communications' operations best practices and emerging trends for overall efficiency, operations, and management.
- Experience advising on Communications operations' business technologies.
- Processes and/or measures for analysis and recommendations
- Experience assessing and offering recommendations on Communications operation manuals and SOPs.
- Experience assessing and offering subsequent written comprehensive recommendations for evaluated entities.

1. All proposals will be reviewed to determine if they adhere to the format and instructions

of the RFQ, meet the criteria indicated and conform to the objectives and requirements of the RFQ. An evaluation team will evaluate the merit of proposals received in accordance with criteria outlined in this RFQ. Incompleteness, significant inconsistencies, or inaccuracies found within a response may result in a reduction of the evaluation rating.

2. UPO reserves the right to: (a) reject any or all proposals, and (b) request clarifications from any or all proposers. 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.
3. Proposals shall be rejected if they: (a) are received after closing date and time, (b) contain alterations not initialed by an authorized official, (c) are not meeting specifications, and (d) are not meeting the general terms and conditions.
4. UPO may request additional information or clarifications before making a final decision. UPO reserves the right to select the particular response which will best serve its business interests.
5. If a selection is made as a result of this RFQ, it shall be awarded to the proposal that is considered most advantageous to UPO.
6. Proposals will be evaluated based on the following criteria:
 - Adherence to RFQ: The proposer adheres to the instructions in this RFQ on preparing and submitting the proposal.
 - Qualifications and experience: The proposer's experience and performance on comparable engagements.
 - Reasonableness of cost: A total dollar amount for the service requested and the detailed breakdown provided with the proposal, if applicable.

IX. GENERAL TERMS AND CONDITIONS

1. Additions and/or Deletions of Service: UPO reserves the right to add and/or delete goods or services to any contract entered into with the contractor. Should a requirement be deleted, payment to the contractor shall be reduced proportionally to the amount of service reduced in accordance with the bid price. Should additional services be required from the contract, prices for such additions will be negotiated between the contractor and UPO. Any changes to any contracts will be made by the execution of a mutually agreed amendment.
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 contractor 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 contractor. Contractor shall be liable for any and all damages sustained by UPO because of contractor's failure to complete such work in progress.

3. 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.
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, 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.
6. 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 always 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 contractor. The organization shall have the right to audit all relevant data upon which the contractor's fees are based.
8. Informal Communications: From the date of receipt of this RFQ by each prospective

proposer until a binding contractual agreement exists with the selected contractor and all other proposers have been notified, or when UPO rejects all proposals, informal communications regarding this procurement shall cease. There shall be no requests from proposers to any Office at UPO with the exception of Procurement Officer; and all communications will be via email.

9. Formal Communications: From the date of receipt of this RFQ by each proposer, until a binding contractual agreement exists with the selected contractor, and all other proposers have been notified, or when UPO rejects all proposals, all communications between UPO and the proposers will be via formal emails, only with the Procurement Office.
10. Costs Incurred: Any costs incurred by proposers in preparing or submitting a proposal or subsequent oral presentation/demonstration shall be the proposer's sole responsibility.
11. Small or Minority or Women-Owned 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 contractor 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.
13. Payment Terms: Preferred invoice payment terms will be 2% 10, net 45 days from the date of invoice. ACH is the preferred method of payment by UPO, and the selected proposer (contractor) will be provided an ACH form to fill out prior to the execution of any contract. 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 contractor's invoices or vouchers and statement of cost ~~audited~~.
14. 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 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.
15. Insurance: Contractor shall, always, 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. RFQ Amendment: In the event that it becomes necessary to revise this RFQ, in whole or in part, an Amendment will be issued and posted on the UPO website for information of all prospective proposers and that Amendment needs to be acknowledged in the proposal: [RFP/RFQs | United Planning Organization](#)
17. 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.
18. 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 bid. After the scheduled time and date for submitting proposals, no proposer will be permitted to withdraw the bid unless the award is delayed for a period exceeding 60 days.
19. Receipt and Opening of Proposals: Proposers are responsible to assure their proposal 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 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 solicitation file. Proposers must pay particular attention to ensure the proposal is properly addressed. UPO is not responsible if the proposal does not reach the destination specified by the appointed date and time.
20. Contract Award Notification: When the evaluation process of the proposals is completed, the selected proposer (contractor) will be formally notified by email. Other notifications will not be honored and should not be considered as a valid offer of award. **The award is not, and should not be construed as, the formation of a contract, nor does it guarantee that UPO will enter into a contract with the awarded proposer.** A formal contract will be generated and supplied by UPO, at its sole discretion, after the conditional award notification is delivered.
21. Certifications: Any agreement resulting from this RFQ shall be subject to but not limited to the following certifications:
 - a. Certification that it nor its principles are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any federal Office or agency from participation in this transaction by any Federal Office or agency in

accordance with 45 CFR Part 76.

b. Certification Regarding Lobbying under Title 31, US Code, Section 1352.

22. Acknowledgement: 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.

23. Claims: 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 the RFQ.

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



Supplier ACH/Direct Deposit Authorization Form

United Planning Organization
Accounts Payable

1. Please Check One:		
NEW Direct Deposit	CHANGE Direct Deposit	CANCEL Direct Deposit
2. Vendor/Payee Information		
Name:		
Address:		
Contact Person's Name (if other than payee):		
Telephone Number:		
Email Address:		
3. Financial Institution Information		
Bank Name:		
Bank Address:		
Name on Bank Account:		
Bank Account Number:		
Nine-Digit Bank Routing/Transit Number (ABA):		
Type of Account:	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
<p>. Approvals/Authorizations - I certify that the information provided on this form is correct, and I hereby authorize United Planning Organization Office of Accounts Payable to electronically deposit payments to the bank account designated above. It is my responsibility to notify UPO Finance Dept for issues with payment received or deposited, and any changes to bank account information at payments@upo.org or (202) 238-4799. I understand that this authorization will remain in full force and effect until UPO Finance Dept received a written notification requesting a change or cancellation and has had reasonable opportunity to act on it, which should take no longer than seven (7) to ten (10) business days.</p>		
Print Name: _____		Signature: _____ Date: _____
Important Information		
Please return completed form via email: payments@upo.org		
Finance Department Use Only	Date Stamp - Received	
Reviewed and		
Approved By: Date:		