

REQUEST FOR QUALIFICATIONS

Fairfield Forward Nonprofit Strategic Planning

Fairfield County, SC
Issued: June 27, 2022

Procurement Office
250 N Walnut Street
Winnsboro, SC 29180

Phone: (803) 635-1415
Fax: (803) 635-5969

FAIRFIELD COUNTY, SOUTH CAROLINA

Fairfield Forward Nonprofit Strategic Planning

DUE DATE/TIME: July 19, 2022 at 11:30 AM EST

NUMBER: 0719 Fairfield Forward Nonprofit Strategic Planning

POINT OF RECEIPT: Procurement Office
Attn: Cathy Washington
Procurement Manager
Fairfield County Administration Offices
250 N Walnut Street
Winnsboro, SC 29180

Inquiries - All inquiries concerning this proposal shall be addressed to the Procurement Office by email only. **Contact with other departments or County representatives without permission of the Procurement Manager may render your proposal void.**

Three (3) bound copies and one (1) electronic device/digital version of your proposal shall be submitted by the due date above. Outside of package must be clearly marked with number and project description above.

GENERAL INFORMATION & INSTRUCTIONS

Sealed proposals shall be enclosed and secured in an envelope/package and properly marked and displayed on outside of envelope/package bearing the name, and address of consultant, proposal number and project identification. Fairfield County **shall not** be responsible for unidentified proposals. Proposals shall be addressed to:

**Cathy Washington, Procurement Manager
Fairfield County Procurement Office
250 N Walnut Street
Winnsboro, SC 29180**

Hand delivered proposals should be delivered to the same above referenced address.

Proposals shall be submitted to the Fairfield County Procurement Office no later than **July 19, 2022 at 11:30 AM EST** at which time all proposals will be opened and **only the names of the respondents will be announced**. Proposals received later than the deadline will be returned unopened. Consultants mailing their proposal must allow a sufficient mail delivery period to insure timely receipt of their proposal. Fairfield County is not responsible for proposals delayed by mail and/or delivery services of any nature.

Prior to submitting a proposal, each consultant shall carefully examine the document, study and thoroughly familiarize himself/herself with the specifications/requirements thereof and notify Fairfield County of any conflicts, errors, or discrepancies.

All proposals shall remain firm for at least sixty (60) calendar days from the date of receipt.

By submission of a proposal, the consultant guarantees that all goods and services meet the requirements of the solicitation during the contract period.

Failure to submit all required information may be determined as a non-responsive proposal.

Questions – All questions concerning this solicitation must be submitted in writing and directed to the Procurement Office by fax, 803-635-5969, Attn: Cathy Washington, or by e-mail, cathy.washington@fairfield.sc.gov Proper reference to this Request for Qualifications is required. **The deadline for submitting questions is July 12, 2022 at 11:30 AM EST.** Verbal information obtained otherwise will not be considered in the awarding of the proposal.

Addendum to Proposal – If it becomes necessary to revise any part of this Request for Qualifications, an Addendum will be issued in writing to all prospective consultants on file in the Procurement Office whom have received this solicitation. All addenda issued by Fairfield County must be acknowledged in writing by consultant on the appropriate form, and a copy returned with their response.

Sales Tax -When applicable, **Fairfield County pays seven percent (7%) sales tax.** The sales tax shall be shown as a separate entry within the proposal response.

Deviations - Any deviations from the Scope of Work indicated herein must be submitted in writing and clearly noted and explained in detail on a separate form and attached to the submitted proposal; otherwise it

will be considered that items/services offered are in strict compliance with this solicitation and the successful consultant shall be held accordingly responsible.

Any deviations within a submitted proposal between prices quoted and restated in the summation sheet shall be resolved by the Procurement Manager as being the lower price, unless the consultant requests in writing, a correction or withdrawal of proposal prior to the date and time set for receipt of proposals.

Certificate of Familiarity – The attached Certificate of Familiarity and Non-Collusion must be completed and returned with proposal. Failure to include this form may be cause for rejection of a proposal.

Signature - A proposal shall be made in the official name of the consultant or individual under which business is conducted (showing the official business address) and must be signed in ink by a person duly authorized to legally bind the person, partnership, company, or corporation submitting the proposal.

Additional Information - Consultants are to include all applicable requested information and may include any additional information they wish to be considered pertinent to this solicitation. Additional information shall be a separate section of the proposal, and shall be clearly identified as such.

Amendments, Withdrawals, and Mistakes - Offers, amendments or withdrawal requests must be received by the time advertised for closing. Proposals may be withdrawn by the consultant prior to, but not after, the time set for closing. Mistakes may be crossed-out and corrections inserted adjacent thereto, and shall be initialed, in ink, by the person signing the proposal.

Confidential Information - Consultants must clearly mark as “Confidential” each part of their offer which they consider to be proprietary information that could be exempt from disclosure under Subarticle 7 Public Access to Procurement Information, Section 11-35-410, Code of Laws of South Carolina, 1976 as amended. If any part is designated as “confidential”, there must be attached to that part an explanation of how this information fits within one or more categories listed in Section 11-35-410. Fairfield County reserves the right to determine whether this information should be exempt from disclosure and no legal action may be brought against Fairfield County or his agents for its determination in this regard.

Award of Contract - If awarded, this contract will be awarded to the consultant whose proposal is within the competitive range and determined to be in the best interest of Fairfield County. Fairfield County will be the only judge as to whether a proposal has or has not satisfactorily met the requirements of this.

The document that will form the contract shall include this entire solicitation, all applicable amendments, and the successful consultant’s proposal.

This solicitation does not commit Fairfield County to award a contract, to pay any cost incurred in the preparation of a proposal or to procure a contract for this solicitation. Fairfield County reserves the right to accept or reject any or all proposals received as a result of this solicitation, to negotiate with all qualified consultants, or to cancel in part or in its entirety this solicitation, if it is in the best interest of the County to do so. Fairfield County reserves the right to interview any, all, or none of the respondents.

Non-appropriation Clause – When this results in a multi-year term contract, the contract shall include a provision that allows cancellation without penalty if funds are not appropriated or otherwise made available to support continuation of performance in subsequent fiscal years. Any contract approved by the County shall be conditioned by a “non-appropriation clause” containing the following or similar language:

“This contract is approved and funded contingent upon grant appropriations being established by the Duke Endowment’s Healthy People Healthy Carolina grant for Fairfield Forward. In the event that the grant is not funded, the County shall not be held responsible for any liabilities beyond the remaining annual term prior to the new budget year.”

Prohibition of Gratuities - The following applies to all procurements issued by Fairfield County: Amended section 8-13-700 and 705 of the 1976 Code of Laws of South Carolina states: “Whoever gives or offers to any public official or public employee any compensation including a promise of future employment to influence his action, vote, opinion or judgment as a public official or public employee or such public official solicits or accepts such compensation to influence his action, vote, opinion or judgment shall be subject to the punishment as provided by Section 16-9-210 and Section 16-9-220.”

Assignment of Contract - Once a contract has been put into place; the consultant shall not assign, sublet, or transfer the contract without the written consent of the Procurement Manager.

Post Award Changes – After contract award, all changes to the Scope of Work or to the specifications must have prior written approval from the Procurement Manager.

*Statement of Assurance,
Compliance & Non-collusion*

Drug Free Workplace

No Response
Form

Statement of Assurance, Compliance and Non-collusion

State of _____) County of

_____)

_____, being first duly sworn, deposes and says that:

- (1) The undersigned, as Offeror, certifies that every provision of this Proposal have been read and understood.
- (2) The Offeror hereby provides assurance that the firm represented in this Proposal:
 - (a) Shall comply with all requirements, stipulations, terms and conditions as stated in The submittal/submittal document; and
 - (b) Currently complies with all Federal, State, and local laws and regulations regarding employment practices, equal opportunities, industry and safety standards, performance and any other requirements as may be relevant to the requirements of this solicitation; did not participate in the development or drafting specifications, requirements, statement of work, etc. relating to this solicitation; and
 - (c) Is not guilty of collusion with other Offerors possibly interested in this Proposal in arriving at or determining prices and conditions to be submitted; and
 - (d) No person associated with Offeror's firm is an employee of Richland County. Should Offeror, or Offeror's firm have any currently existing agreements with the County, Offeror must affirm that said contractual arrangements do not constitute a conflict of interest in this solicitation; and
 - (e) That such agent as indicated below is officially authorized to represent the firm in whose name the Proposal is submitted.

Name of Firm:

Name of Agent:

Signature & Title:

Address:

Subscribed and sworn to me this _____ day of _____, 20_____.

_____ My commission expires:
(Title)

NOTARY SEAL:

Drug Free Workplace Act Statement

The undersigned hereby certifies that he/she understands and is in full compliance with the requirements set forth in Title 44, Code of Laws of South Carolina, 1976, Chapter 107, Paragraph 47, as set forth in item 41 of the general conditions of this solicitation.

Name of Company: _____

Agent of Company: _____

Signature of Agent: _____

Date: _____

Subscribed and sworn to me this _____ day of _____, 20_____.

_____ My commission
expires:
(Title)

NOTARY SEAL:

No Proposal Response

If a “No Proposal” is to be submitted, please check the appropriate box(es) below and return this form, prior to the Proposal due date, to:

Fairfield County Office of Procurement
250 N Walnut Street
Winnsboro, SC 29180

Cannot respond to this solicitation due to the following reason:

- Do not sell or provide the requested goods or services
 - Cannot comply with specifications/statement of work
 - Specifications/statement of work is unclear
 - Cannot meet delivery or period of performance
 - Delivery/period of performance is unreasonable
 - Cannot meet the bond requirements
 - Not enough time to prepare Proposal
 - Plan to subcontract
 - Job is too large
 - Job is too small
 - Other (please specify) _____
-

Company:	
Company Representative:	
Phone/Fax:	
Signature:	

REQUEST FOR PROPOSALS: NONPROFIT STRATEGIC PLANNING

Submission Deadline: July 19, 2022

PURPOSE

Fairfield County as the backbone agent under the Duke Endowment's Healthy People Healthy Carolina grant for Fairfield Forward (FF), a 501 (c)(3) nonprofit organization dedicated to identifying and addressing the needs of Fairfield County residents, has initiated a Request for Proposals (RFP) process to identify a qualified consultant to guide and execute a strategic planning process.

The qualified consultant will work with the Fairfield Forward Board of Directors and staff to produce a 3-year strategic plan. Fairfield County seeks a consultant who demonstrates strong understanding of nonprofit structure and operations, excellent facilitation skills and proven experience with nonprofit strategic planning. In addition, the consultants should be knowledgeable about preventive health initiatives nationally, the local and national nonprofit/public health landscape, and government and private grant programs. Experience with community engagement and participant-centered practices is highly preferred.

ABOUT FAIRFIELD FORWARD

Fairfield Forward (FF) is an alliance of community members, leaders and agencies that utilize collaboration and partnership to foster a culture of wellness within the community that we love. Together, identifying needs and facilitating collaborative solutions, we strengthen community ownership at all levels of our common agendas, positively changing the quality of life for our current and future generations.

Fairfield Forward's main current initiative is Healthy People, Healthy Carolinas (HPHC). Healthy People, Healthy Carolinas is a preventive health initiative funded by The Duke Endowment that aims to reduce chronic disease prevalence with a focus on diabetes, obesity/unhealthy weight and heart disease. The HPHC initiative employs the usage of multi-sector collaboration to improve health outcomes in Fairfield County.

SCOPE OF WORK & DELIVERABLES

The project is expected to include the design and execution of a strategic planning process that meets the criteria outlined in this RFP, including project management, facilitation, budget for implementation, and support structure for plan implementation. The 3-year strategic plan is targeted for 9/30/2022.

Fairfield envisions the scope of work to be completed in three stages. Work completed in each of the stages must be summarized in a report to the Board of Directors and staff of Fairfield Forward. We expect that the work will be completed within three months from start date.

Stage 1: Preparation & Assessment

This stage requires the consultant to research and report the following in preparation for the strategic planning process. Items to be considered include:

- Review FF's history and overall organizational assessment through SWOT (strengths, weaknesses, opportunities, and threats) analysis, followed by a gap analysis to evaluate opportunities and/or challenges
- Conduct an environmental scan benchmarking FF in alignment with other preventive health initiatives/public health/community development organizations with a similar focus, regionally and nationally
- Conduct interviews, surveys and/or focus group polling to receive partner, stakeholder and community input (should include but not be limited to current, past and potential funders)
- Assess the current and future direction of the field, specifically private foundation investment trends, emerging research, government programs and policy efforts

Stage 2: Strategic Plan Creation

At this stage, the consultant helps the nonprofit identify strategic goals and creates an actionable strategic plan. The plan will include:

- An executive summary
- A comprehensive plan that identifies:
 - o Shared Mission and Vision
 - o Proposed priorities, innovative strategies, synergistic approaches, etc.
 - o SMART (specific, measurable, achievable, realistic, and time-limited) Goals
 - o Opportunities for including staff, leadership and the Board
 - o Objectives and tactics
 - o Early action items to demonstrate progress, create momentum and buy-in
 - o Listing of responsible parties and roles
 - o Metrics and measurable outcomes
- Optional components of the plan could include:
 - o Resource Development strategies
 - o Recommendations for enhancement of current financial, technological and human capital
 - o Communication strategies

Stage 3: Evaluation & Reporting

This stage requires the consultant to provide a written and verbal evaluation report to Fairfield Forward on the strategic planning process and the 3-year strategic plan that was developed.

PROPOSAL FORMAT

Proposals must follow this format, in this order:

1. General Information

- a. Contact information: Name of consultant/firm, address, phone number, email address
- b. RFP source: How did you learn about this opportunity?

2. Narrative, Qualifications & References

- a. Opening: Your approach to strategic planning.
- b. Qualifications: Relevant work activities, expertise, knowledge and strategic planning experience. Experience should include specific examples of similar related nonprofit work. Please note any prior experience assisting non-profits with their strategic priorities in the area of work related to FF.
- c. References with contact information listed at the bottom.

Some key qualifications that will be considered:

- i. Education (degree(s) and/or certificate(s))
- ii. Experience in successfully developing strategic plans
- iii. Knowledge of collective impact or collaborative strategic initiatives
- iv. Strong facilitation skills
- v. Experience in creating a neutral environment for obtaining input
- vi. Experience in gathering and utilizing data to drive the strategic process
- vii. Ability to constructively challenge key stakeholders
- viii. Experience in inspiring others to think innovatively
- ix. Project management and change management experience
- x. Experience with community engagement and participant-centered practices
- xi. Familiarity with the core programs at FF (preferred but not required)

c. Your Team: Information about all team members who will be involved with the project, including names, email addresses, title, tenure, experience and education.

d. References: Three client references (please include each individual's name, address, phone number, email address and relationship to the bidder).

3. Project Plan & Budget

a. Work Plan: Detailed work plan, to include:

- i. Major stages and milestones
- ii. Specific activities to be conducted at each stage
- iii. Timeline for the activities to be conducted at each stage
- iv. List of milestones and deliverables tied to the activities to be conducted at each stage
- v. Recommended changes to stages based on consultant's experience, as well as the scope of work and deliverables that are included in this RFQ.

b. Budget: Detailed project budget (including estimated hours, and proposed payment schedule as it relates to project milestones and deliverables).

4. Attachments & Supporting Documents

- a. Work samples: At least one sample of a previously completed strategic plan relevant to the scope of work and deliverables that are included in this RFQ.

Portions may be redacted to protect private information as needed.

- b. Supporting documents: Attachments may also be included.

Scoring Criteria

Proposals will be reviewed and evaluated based on the following weighted criteria: qualifications, scope of work, work plan and budget.

Notification of Selection

Fairfield County will seat the RFQ Selection Committee. The evaluation process will include individual committee member evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews may be scheduled with finalists, particularly if two or more proposals are closely rated and/or more information is needed. References will be contacted for all finalists.

An Evaluation Committee will be formed. The Evaluation Committee will review each proposal for compliance to the RFQ. It will be the option of the County to conduct interviews. Interviews may be conducted with some or all of the contractors.

The Evaluation Committee shall evaluate each of the responses using the following general criteria:

1. The general experience and location of the contractor
2. The contractor's specific experience with implementation of the type of procurement as described in this solicitation
3. The general qualifications and technical competency of the individuals in the firm
4. The specific qualifications and technical competency of the individuals to be involved in the project as they relate to this project
5. Past performance; contractor must submit a representative list of all similar projects completed within the past five (5) years to include contact persons names, technical contacts, addresses and telephone numbers
6. The current and projected workload of the contractor as it affects this project
7. The contractor's insight related to the project and the County's needs
8. Fee schedule and estimated number of hours
9. The contractor's responsiveness to the County's request

INSURANCE

The successful contractor shall procure, maintain, and provide proof of insurance coverage for injuries to persons and/or property damage as may arise from, or in conjunction with, the work performed on behalf of the County by the contractor, his agents, representatives, employees or subcontractors. Proof of coverage as contained herein shall be submitted fifteen (15) days prior to the commencement of work and such coverage shall be maintained by the contractor for the duration of the contract period; for occurrence policies.

1. Commercial General Liability

Coverage shall be as broad as: Comprehensive General Liability endorsed to include Broad Form, Commercial General Liability Form including Products/Completed Operations.

Minimum Limits:

\$1,000,000 General Aggregate Limit
\$1,000,000 Products & Completed Operations
\$1,000,000 Personal & Advertising Injury
\$1,000,000 Each Occurrence Limit
\$50,000 Fire Damage Limit
\$5,000 Medical Expense Limit

2. Business Commercial Automobile Liability

Coverage sufficient to cover all vehicles owned, used, or hired by the contractor, his agents, representatives, employees or subcontractors.

Minimum Limits:

\$1,000,000 Combined Single Limit
\$1,000,000 Each Occurrence Limit
\$5,000 Medical Expense Limit

3. Workers' Compensation

Limits as required by the Workers' Compensation Act of SC, to include state's endorsement for businesses outside of SC. Employer's Liability, \$1,000,000.

4. Professional Liability

Minimum limits are \$1,000,000 per occurrence.

Coverage Provisions

1. All deductibles or self-insured retention shall appear on the certificate(s).
2. Fairfield County, its' officers/ officials, employees, agents and volunteers shall be added as "additional insured" as their interests may appear. This provision does not apply to Professional Liability or Workers' Compensation/Employers' Liability.
3. The contractor's insurance shall be primary over any applicable insurance or self-insurance maintained by the County.
4. Shall provide 30 days written notice to the County before any cancellation, suspension, or void of coverage in whole or part, where such provision is reasonable.
5. All coverage for subcontractors of the contractor shall be subject to all of the requirements stated herein.
6. All deductibles or self-insured retention shall appear on the certificate(s) and shall be subject to approval by the County. At the option of the County, either; the insurer shall reduce or eliminate such deductible or self-insured retention; or the contractor shall be required to procure a bond guaranteeing payment of losses and related claims expenses.
7. Failure to comply with any reporting provisions of the policy(s) shall not affect coverage provided the County, its officers/officials, agents, employees and volunteers.
8. The insurer shall agree to waive all rights of subrogation against the County, its' officers/officials, agents, employees or volunteers for any act, omission or condition of premises which the parties may be held liable by reason of negligence.
9. The contractor shall furnish the County certificates of insurance including endorsements affecting coverage. The certificates are to be signed by a person authorized by the insurance company(s) to bind coverage on its behalf, if executed by a broker, notarized copy of authorization to bind, or certify coverage must be attached.
10. All insurance shall be placed with insurers who are lawfully authorized to do business in the state of SC, and who maintain an A.M. Best rating of no less than an A:VII. If A.M. Best rating is less than A:VII, approval must be received from the County's Risk Manager.

OTHER

All inquiries concerning this proposal shall be addressed to the Procurement Office. **Contact with other departments or County representatives without permission of the Procurement Manager may render your proposal void.**

Cathy Washington
Fairfield County Procurement Office
Post Office Drawer 60
Winnsboro, SC 29180
Telephone: (803) 635-1415 Fax: (803) 635-5969
E-mail:cathy.washington@fairfield.sc.gov

ATTACHMENT 1

CERTIFICATE OF FAMILIARITY AND NON-COLLUSION

The undersigned, having fully familiarized himself with the information contained within this entire solicitation and applicable amendments, submits the attached proposal and other applicable information to the County, which I verify to be true and correct to the best of my knowledge. I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies or equipment, and is in all respects, fair and without collusion or fraud. I agree to abide by all conditions of this proposal and certify that I am authorized to sign this proposal. ***By submission of a signed proposal, I certify, under penalties of perjury, that the below company complies with section 12-54-1020(B) of the SC Code of Laws 1976, as amended, relating to payment of any applicable taxes.*** I further certify that this proposal is good for a period of sixty (60) days, unless otherwise stated.

Company Name as registered with the IRS

Authorized Signature

Correspondence Address

Printed Name

City, State, Zip

Title

Telephone Number Fax Number

Date



S. C. CONTRACTOR'S LICENSE # _____
(if applicable)



Remittance Address

City, State, Zip

Telephone Number

Toll-Free Number if available

Federal Tax ID Number

SC Sales and Use Tax Number