



## PROPOSAL REQUIREMENTS

The response to this RFP shall consist of the following sections:

- Cover Letter
- Background and Experience of Contractor
- Project Staffing and Organization
- Cost Proposal

### 1. Cover Letter

Each proposal must include a cover letter, signed and dated by an individual authorized to legally bind the prospective Contractor. If said individual is not the corporate president, submit evidence showing the individual's authority to bind the prospective Contractor.

The cover letter must contain a statement that the person signing the proposal is a legal representative of the prospective Contractor and is authorized to bind the prospective Contractor.

### 2. Background and Experience of Prospective Contractor

It is important for our organization to work with companies that value organizational health and see self-improvement internally as part of their culture and their work. Please include your company's philosophy and any evidence to support this belief.

Please include background information that shares details of experience with similar projects outlined in the RFP.

A list of at least two references (including contact persons, addresses and telephone numbers) for whom similar work has been performed shall be included.

### 3. Financial Stability

This section shall include a statement of the company's financial viability and standing with professional organizations that speak to the stability and sustainability of the company.

Submit verification of the prospective Contractor's Federal Taxpayer Identification Number (TIN).

### 4. Project Organization

This section must include the proposed staffing, deployment and organization of personnel to be assigned to this project.

The prospective Contractor shall provide information as to the qualifications and experience of the company and the personnel to be assigned to this project. Citing experience with similar projects and the deliverables/outcomes would be key for the reader to have an understanding of the capacity of the company to align with the request. Include a management/manpower summary that clearly specifies the anticipated number, type and time commitment of individual personnel who will be assigned to this project.



## **5. Cost Proposal**

The prospective Contractor must submit a Cost Proposal/Budget for what services within the RFP it desires to submit a proposal.

If this is a multi-year bid for on-going services, the Cost Proposal/Budget and Budget Narrative should include any cost differentials for each fiscal year of the multi-year proposal period.



## GENERAL INFORMATION ON SUBMITTING PROPOSALS

1. **TERMS AND CONDITIONS.** All proposals are subject to the terms and conditions outlined herein. The prospective Contractor specifically agrees to the conditions set forth by signature to the proposal.
2. **ORAL EXPLANATIONS.** The Local Partnership shall not be bound by oral explanations or instructions given at any time during the competitive bidding process or after award.
3. **REFERENCE TO OTHER DATA.** Only information which is received in response to this RFP will be evaluated; reference to information previously submitted shall not be evaluated.
4. **COST FOR PROPOSAL PREPARATION.** Any costs incurred by prospective Contractors in preparing or submitting offers are the prospective Contractor's sole responsibility; the Local Partnership shall not reimburse any prospective Contractor for any costs incurred prior to award.
5. **RIGHT TO SUBMITTED MATERIAL.** All responses, inquiries, or correspondence relating to or in reference to the RFP, and all other reports, charts, displays, schedules, exhibits, and other documentation submitted by the prospective Contractors shall become the property of the Local Partnership when received.
6. **OFFEROR'S REPRESENTATIVE.** Each prospective Contractor shall submit with its proposal the name, address, and telephone number of the person(s) with authority to bind the firm and answer questions or provide clarification concerning the firm's proposal.
7. **SUBCONTRACTING.** In the event the prospective Contractor desires to subcontract any part of the contracted services, the proposal must clearly indicate what work it plans to subcontract and to whom and must provide all required information for each subcontractor. Only the subcontractors specified in the proposal shall be considered approved upon award of the Contract.
8. **PROPRIETARY INFORMATION.** Trade secrets or similar proprietary data which the prospective Contractor does not wish disclosed to other than personnel involved in the evaluation or contract administration will be kept confidential to the extent permitted by N.C.G.S. 132-1.3 if identified as follows: each page shall be identified in bold face at the top and bottom as "Confidential." Any section of the proposal that is to remain confidential shall also be so marked in bold face on the top of the title page of that section. Cost information may not be deemed confidential. In spite of what is labeled as confidential, the determination as to whether or not it is shall be as governed by North Carolina law.



## THE PROCUREMENT PROCESS

The following is a general description of the process by which a prospective Contractor will be selected to provide services.

1. Request for Proposals (RFP) is issued to prospective Contractors.
2. A deadline for written questions is set. (RFP notice for details.)
3. Proposals can be submitted electronically provided a signature from an official authorized to bind the firm is a part of the electronic submission. Unsigned proposals will not be considered.
4. All proposals must be electronically received by the Local Partnership no later than the date and time specified on the RFP notice. All submissions should be emailed to [autumn.bishop@oneplaceonslow.org](mailto:autumn.bishop@oneplaceonslow.org).
5. At their option, the Local Partnership's evaluators may request oral presentations or discussion with any or all prospective Contractors for the purpose of clarification or to amplify the materials presented in any part of the proposal. However, prospective Contractors are cautioned that the evaluators are not required to request clarification; therefore, all proposals should be complete and reflect the most favorable terms available from the prospective Contractor.
6. Proposals will be evaluated according to criteria that may include the need for the program, program content and evaluation, completeness, content, experience with similar projects, ability of the Contractor and its staff, cost, and financial stability of the prospective Contractor. Award of a contract to one prospective Contractor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous to the Local Partnership.
7. Due to the anticipated size of the contract, the contract will require the organization's Board's approval. Potential contractors will be notified of the date that the Board shall review the proposals for approval.
8. The Local Partnership will contact the selected Contractor to obtain information and documentation required for preparation of the contract to include the following:
  - a. Name; title; telephone and fax numbers; and mailing address, including street address and zip code, of the contract administrator.
  - b. Name; title; telephone and fax numbers; and mailing address, including street address and zip code, of the person(s) authorized to sign financial status reports.
  - c. Copy of Conflict of Interest policy.
  - d. Proof of insurance that may include, but not be limited to, the following:
    - 1) Workers' compensation;
    - 2) General business liability;



- 3) Fidelity bonding (e.g., employee crime or dishonesty);
- 4) Professional liability;
- 5) Automobile (owned, hired or non-owned).

Providing and maintaining adequate insurance coverage is a material obligation of the Contractor and is of the essence of the contract. The Local Partnership will not contract with any prospective Contractor that is unable to furnish proof of required insurance coverage.

- e. Completed Internal Revenue Service (IRS) *Form W-9*.

or

- f. If a nonprofit entity, a copy of the Internal Revenue Code § 501(c)3 determination letter received from the IRS.
9. The Local Partnership will not contract with any prospective Contractor that fails to provide **all** required information and documentation. After all required information and documentation has been submitted, the Local Partnership will prepare the contract, notify the selected Contractor and request that the Contract be signed. **A template of the Contract that the selected Contractor will be required to sign is available upon request.**
  10. The Contract must be executed prior to the start of work and incurring any expenses.
  11. If all proposals are rejected, prospective Contractors will be notified promptly by the Local Partnership.