

ADDENDUM 2
RFQ CRT STRATEGIC PLANNING CONSULTANT
September 26, 2019
FINAL ADDENDUM

The following questions/clarifications have been received.

Q. Did you use a strategic planning consultant for your last planning cycle? If so, who did you use?

A. Yes we used a strategic planning consultant, but will not be disclosing the company's name.

Q. Has your Steering Committee been established yet?

A. CRT is working to finalize the committee.

Q. How much discussion/focus do you want the Steering Committee to spend on the evaluation of Mission and Vision? Do you anticipate this being a significant portion of the 2-day retreat?

A. No, we do not anticipate this being a significant portion of the 2-day retreat.

Q. In regards to our fees, we do not price our projects using # of hours and hourly rates. We are able to provide a single fixed fee, including travel; will that suffice?

A. Travel costs and the price of implementation activities should be listed separately.

Q. For the live interviews, are you envisioning that all staff, board, client, external stakeholder, and foundation interviews are complete in person?

A. Some live interviews may be completed by phone. We are looking for consultant to design a comprehensive approach to gathering this information using a variety of methods including live interviews. If not, how many/what percentage might you expect would be done remotely? We would be looking for the consultant to recommend a percentage based on research sampling sizes. Are your external stakeholder and corporate foundations located in close proximity? Yes. Would they travel to CRT, or would you be looking for the consultant to travel to them? That will need to be discussed and negotiated to determine the interviewee's preference.



Method of Award – page 5

Each proposal received will be evaluated and scored as follows:

Evaluation of Strategic Planning Consultant Proposals

Community Renewal Team will review and evaluate all properly submitted proposals that are received on or before the deadline. The project team will first review each proposal for compliance with the minimum qualifications and mandatory requirements of the RFP. Failure to comply with any mandatory requirements may disqualify a proposal. The project team shall participate in the analysis of proposals, the interview process and the final recommendation of the selected consultant for the project. Upon successful negotiations with the selected consultant, the contract will be recommended for approval by the project team to agency leadership for final approval.

Specific requirements as detailed in the RFP will be baseline scored as follows:

Cover Letter (10 points possible)

Cover letters with incomplete contact information will receive 5 points. Full points (10) will be awarded if all required information is included in the cover letter. Proposals will score 0 points if required information is not included in the cover letter or if no cover letter is provided.

Methodology (40 points possible)

The following components will each be scored on a scale of 1-10 based on detail provided. Proposals will score 0 points for missing components required by the RFP.

- Philosophy toward strategic planning
- Technical approach/methodology
- Preferred planning methods
- Expected roles & responsibilities/Project Management Plan

Experience (30 points possible)

The following components will each be scored on a scale of 1-10 based on detail provided. Proposals will score 0 points for missing components required by the RFP.

- Statement of management approach and qualifications
- Knowledge of Community Action Strategic Planning
- Recent experience in facilitating planning of similar size/scope/complexity



Work Samples (5 points possible)

Respondents will score 0 points if no work samples are provided; 5 points will be awarded if work samples illustrating relevant strategic planning skills are included with the proposal.

References (5 points possible)

Respondents will score 0 points if fewer than three references are provided; 5 points will be awarded if three or more references are provided.

Budget (10 points possible)

Proposals that do not include a detailed budget and budget narrative will score 0 points. The following components will each be scored on a scale of 1-5 based on detail provided.

- Detailed budget inclusive of all expenses
- Implementation costs (broken out as separate expenses)

Scoring Summary:

Cover letter	10
Methodology	40
Experience	30
Work Samples	5
References	5
Budget	10
Total Points Available	100

Proposals that meet minimum threshold (75 points) will be ranked based on the criteria stated below:

1. Responsiveness of the Proposal to the project objectives.
2. Responding contractor’s experience in completing work of a similar size and scope.
3. Specific qualifications of the primary staff who will manage, supervise, and provide services, including past experience on projects of similar size and scope.
4. Responding contractor’s experience and qualifications in working with Community Action Agencies.
5. Proposer’s project management methodology and experience.



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6. Responses of the provided references.
7. Project approach and methodology.
8. Cost of services and payment policies.
9. Such other information that may be required or secured.