

REQUEST FOR PROPOSALS



Overview

The United Way of Monongalia and Preston Counties, Inc. (“UWPMC”) is issuing this Request for Proposals (RFP) for a community needs assessment, preparation of community needs assessment results, strategic planning based on those results, and transition trainings for our organization. The UWPMC invites you, your organization, or your firm (“YOU”) to submit a proposal no later than 3:00 PM Eastern on Monday, October 22, 2018.

Background of the United Way of Monongalia and Preston Counties, Inc.

The UWPMC is a volunteer-directed community organization, which is independently governed by a 43-member board of directors representing the communities we serve. We are a proud member of United Way Worldwide which serves as the leadership and support organization for our network of community-based United Ways around the world. We are a leader in building a stronger and healthier community by developing resources and creating partnerships that empower individuals to improve their lives. Through our funded and community partners, we are working to address health, education, and financial stability needs in our community. The UWPMC generated just over \$1.5 million through its 2017 annual fundraising campaign, which is used to meet these local health and human service needs. An additional \$300,000 was generated in grants and sponsorships, resulting in total resources in 2017 of \$1.8 million. For additional information about the organization, visit our website at unitedwaympc.org.

Objectives

The UWPMC recognizes the changes in our community, its needs, and our own donor pool. The UWPMC wants to lead the change to improve Monongalia and Preston Counties in the most efficient and effective manner possible. The UWPMC is uniquely positioned as the catalyst that unites the resources of our community – people, talent, knowledge, and finances – to address our community’s critical health and human service needs. This change will require a multi-year transition to change the way we do business. To transition to this new business model, the UWPMC needs reliable data about the status of our region and the health and human service challenges facing our communities, gathered through a comprehensive community needs assessment. Based on the assessment findings, the UWPMC will implement a Community Impact Initiative to help expand its roles of fundraising and fund-distribution to include identifying critical community needs, agreeing upon priorities, developing change strategies, and targeting resources to create lasting changes in community conditions. This transition will involve a broad group of community stakeholders focused on the development of strategic priorities that will be addressed in the next cycle of program partnership investments and allow the UWPMC to assess how it operates, dedicates its resources, evaluates its results, and communicates with its donors.

Response to this RFP

YOU shall include a scope of services to be performed, along with an associated schedule. Ideally this will include the design and implementation of a community needs assessment that includes both primary and secondary data. Primary data sources may include but are not limited to: UWMPC funded partner agencies, UWMPC donors, the public, and clients of services provided by UWMPC funded partner agencies. Secondary data sources may include but are not limited to: relevant and current statistics, research, and other completed needs assessments. Discuss the depth and breadth of the assessment, how the results will be delivered, planned communications strategies, and any possible strategic meetings YOU may have to assist the Community Impact Initiative (CI²) Committee, the UWMPC staff, the UWMPC Board of Directors, and other stakeholders with understanding and utilizing the findings. The information listed in this paragraph should not be considered required nor all-inclusive. Your approach to help move the UWMPC forward should be presented clearly.

To better help the UWMPC understand why YOU are qualified, discuss your independence with respect to UWMPC, your areas of expertise, relevant qualifications and credentials of your proposed team, the extent to which each team member will be involved, and a summary of your understanding of our objective. If YOU have experience working with the non-profit sector, detail that experience and provide contact information for previous clients that we may contact as references.

Detail your planned methods to minimize costs while maximizing the value of the services to be performed. Set forth a detailed plan of your fees for the proposed services, including any specific expectations of assistance YOU may need from the UWMPC staff or the CI² Committee to complete your work.

UWMPC reserves the right during contract negotiations to discuss fee schedule, reduction of or addition to the planned services, schedule considerations, etc.

Evaluation of Proposals

UWMPC will evaluate proposals on a qualitative and quantitative basis as follows:

CRITERION 1: Feasibility and Innovation (45%)

This criterion will evaluate the feasibility of the proposed assessment as detailed in the proposal. This criterion will also be used to gauge the degree of innovation of the proposed assessment in comparison to existing assessments.

1. Proof of the level of the Applicant's awareness of the goals and mission of the UWMPC.
2. Proof of level of the Applicant's awareness of previous needs assessments by other parties for other customers that include all or part of Monongalia and Preston Counties.

3. Robustness of the plan to include relevant secondary data from previous needs assessments, if appropriate; or rationale of omission of data from such assessments.
4. Extent to which the proposed assessment is targeted to the UWMPC's goals, mindful of the region of study, and innovative compared to previously completed needs assessments including all or part of Monongalia and Preston Counties.
5. Validity/viability of the proposed assessment.
6. Degree to which the proposed assessment addresses the objectives outlined in the RFP.

CRITERION 2: Project Execution and Management Approach (25%)

This criterion will evaluate the level of the Applicant's management skills and the adequacy, appropriateness, and reasonableness of the proposed management strategy to achieve the requirements of both the RFP and the proposed assessment.

1. Degree to which the Applicant demonstrates sound project management; clearly defines the roles and responsibilities of each member of the project team; and identifies an appropriate schedule of tasks, value of work to be performed, and use of sound risk mitigation strategies/plans. At a minimum, the Applicant should address the following:
 - Executive Summary – clarity and conciseness of the project description including objectives, goals, expected results, and approach.
 - Key Personnel – appropriate utilization of personnel.
 - Cost Plan – adequacy of detail in describing how the Applicant will manage and monitor funds throughout assessment.
 - Project Schedule – adequacy and relevance of tasks and any task interdependencies in concert with the timeline identified in the RFP.
 - Risk Management – extent to which the proposal identifies and defines the potential risks that may impact assessment success, and the adequacy of the proposed approach to continue to identify and mitigate those risks throughout the assessment.
2. Degree to which the tasks to be performed are sufficiently detailed, concise, understandable, and appropriate to perform the assessment.

CRITERION 3: Team and Resources (30%)

This criterion will evaluate the likelihood that the project team and other resources are appropriate and sufficient to achieve the project's proposed goals and objectives.

1. Adequacy and appropriateness of the qualifications, expertise, and experience of the Applicant.
2. Degree of demonstrated experience of the Applicant in completing comparable successful assessments.
3. Level of support from past clients as evidenced by letters of support and/or recommendation.

Timeline

The timeline for this process will be as follows:

- Proposals are due by 3:00 PM Eastern, Monday, October 22, 2018.
- Projected decision date is Tuesday, November 20, 2018.
- Projected notification of selection date is Wednesday, November 21, 2018.
- It is anticipated that work will be substantially complete by Friday, March 1, 2019.

Submission of Proposals

- Proposals are to be submitted in Adobe PDF format, not to exceed 10MB, to Admin@unitedwaympc.org with a copy to Brandi@unitedwaympc.org no later than 3:00 PM Eastern on Monday, October 22, 2018.
- Subject line of proposal submission email should be “UWMPC Community Needs Assessment Proposal.”
- YOU are solely responsible for ensuring that your proposal is timely received.
- UWMPC will provide email confirmation of receipt of your proposal.

Key Personnel

Should YOU have questions during preparation of your proposal, contact the UWMPC Chief Executive Officer, Brandi Helms at Brandi@unitedwaympc.org.

Other Details

All information provided by UWMPC to YOU is to be considered confidential. YOU should not disclose any information obtained through this request for proposals process. YOU should not publicly discuss this request for proposals process.

UWMPC reserves the right to amend this RFP.

UWMPC reserves the right to withdraw or cancel this RFP with or without cause.

UWMPC reserves the right to select none, one, or several proposals under this RFP for negotiation of an award. Those selected for an award under this RFP will be notified in writing.

UWMPC reserves the right to terminate negotiations with YOU and reissue this RFP if mutually-agreeable terms cannot be reached for an award.

YOU may not commence work without an award agreement approved by the UWMPC Board of Directors.

Sincerely,

A handwritten signature in cursive script that reads "Brandi L. Helms".

Brandi L. Helms, MPA, MSW
Chief Executive Officer