

NACCHO

National Association of County & City Health Officials

The National Connection for Local Public Health

**REQUEST FOR PROPOSALS
Health Equity Symposium
Meeting Planning and Facilitation
National Association of County and City Health Officials
(NACCHO)**

Date of release: Wednesday, February 1st, 2023

Final applications are due by Friday, March 3rd, 2023 at 11:59 pm ET. No exceptions.





Summary Information

Project Title: Health Equity and Overdose Prevention Mentorship Program Technical Assistance Meeting Facilitation

Proposal Release Date: Wednesday, February 1st, 2023

Proposal Due Date and Time: Friday, March 3rd, 2023 at 11:59 pm ET

Selection Announcement Date: On or around the week of March 13th, 2023

Source of Funding: NACCHO

NOA Award No.: 6 NU38OT000306-04-02

Maximum Funding Amount: \$30,000

Estimated Period of Performance: 3/20/23 to 7/31/23

Point of Contact for Questions Regarding this Application: Ronique Taffe, Program Analyst, Overdose, Injury and Violence Prevention (rtaffe@naccho.org)

I. Project Background and Overview

The National Association of County and City Health Officials (NACCHO) represents the nation's nearly 3,000 local health departments (LHDs), which work to protect and improve the health of all people and all communities. NACCHO provides resources to help LHD leaders develop public health policies and programs to ensure that communities have access to the vital programs and services people need to keep them protected from disease and disaster.

NACCHO, with support from the Centers for Disease Control and Prevention (CDC), is pleased to offer a funding opportunity for a skilled meeting planner and facilitator for a mid-size (50-100) 1-day in-person event to be held in Denver, CO the week of NACCHO's Annual 360 Conference from July 10-13th, 2023. This meeting will bring together grantees and partners from the *Health Equity and Overdose Prevention Mentorship Program* for the Health Equity Symposium. This is the second iteration of our mentorship program and includes opportunities for local health departments (LHDs) to learn from peers, share experiences, and exchange strategies for integrating health equity into drug overdose prevention and response efforts. As part of this work, the Health Equity Symposium is a chance for the grantees to 1) share their program and jurisdiction successes, challenges, and lessons learned, 2) network with one another, and 3) engage with new public health thought leaders to learn and discuss best practices and strategies for embedding equity into overdose prevention and response initiatives.

For additional background information on last year's Symposium structure and programming, please visit this microsite [here](#). Please note that the selected consultant will be responsible for determining the most appropriate organization and structure for this year's in-person event, with input from NACCHO.

Selections will be made **on or around the week of March 13th, 2023** and the project period will run from the date of contract execution to 7/31/23. **Applications must be submitted no later than 11:59 PM Eastern, Friday, March 3rd, 2023.** All necessary information regarding the project and application process may be found in this Request for Proposal (RFP). Applicants may pose individual questions to



NACCHO at any point during the application process by e-mailing NACCHO's Overdose, Injury and Violence Prevention (OIVP) Team at IVP@naccho.org.

II. Eligibility and Contract Terms

This RFP is open to all qualified contractors.

Agreement with NACCHO [standard contract terms and conditions](#) is a requirement. As part of the application, the contractor will be asked to verify that they have read NACCHO's standard contract language and have provided a copy to the individual with signing authority at your organization for advanced consideration. If you are an applicant from Florida or Texas, please contact NACCHO immediately for a copy of the Florida or Texas standard contract.

Bidders should review all terms and conditions to determine whether they are appropriate for submitting a proposal.

III. Project Requirements and Expectations

The awardee will be required to conduct the following activities throughout the project period:

Phase 1: Planning and Design

- Review the program grantee materials (including needs/assets assessments, workplans and technical assistance (TA) plans) and past evaluations of programmatic activities.
- Lead a small planning committee including the program team, partners and relevant CDC staff. In coordination with NACCHO, determine frequency of conference calls and roles of committee members and identify all the roles/responsibilities that need to be fulfilled by consultant or NACCHO team members during the meeting.
- With NACCHO, CDC, speakers and consultants, develop an internal agenda with a visual aid based on the identified needs of grantees to help identify and confirm topics.
- Support ongoing communication with NACCHO, CDC, grantees, and speakers on all relevant planning details (draft invitation, registration form, etc.) and collaborate with NACCHO's IT team to develop and launch a Microsite to house event details.
- Develop a project timeline indicating the dates of each planning meeting and tasks and activities that need to be completed, materials to be developed, and supplies to be procured over the project period.
- Develop meeting-specific agendas, slides, facilitation guides, and other meeting resources as needed in conjunction with planning committee.
- Coordinate and facilitate where appropriate preparatory sessions for event speakers and facilitators.
- Prepare a list of resources to be printed and or delivered to the meeting site by NACCHO.



Phase 2: In Person Facilitation

- Coordinate, manage and facilitate the in-person Health Equity Symposium unless the decision is made by the CDC and NACCHO to convert virtually based on COVID-19 health and safety considerations. This tentatively includes introducing speakers, moderating panels, and facilitating an end-of-program debrief or reflection to close out the event and the program for grantees. If the event is virtual, the consultant will be expected to adapt all event materials to best fit a virtual environment. We will not offer a hybrid event.
- Work with NACCHO's Research & Evaluation team to develop relevant event evaluation questions to be deployed using NACCHO's survey tool vendor.
- Liaise with the venue for facilitation logistics.

Phase 3: Post-Meeting Activities

- Hold a debrief session with NACCHO following Symposium to discuss event experience and activities.
- Draft and distribute any relevant follow-up materials generated during the event.
- Provide a brief written report that summarizes key themes, lessons learned, and recommendations for the future.

NACCHO staff will serve as a resource to the consultant to ensure adequate completion of the scope of work (SOW) and achievement of project goals by fulfilling the following responsibilities:

- Provide access to grantee materials and past meeting evaluations,
- Provide advisory support regarding the event schedule, strategy, and attendee list,
- Liaise with event attendees, speakers, and venue on administrative and logistical information, as needed,
- Secure travel for event attendees and speakers,
- Contract with hotels and other venues as necessary to host the meeting,
- Provide feedback on agendas, facilitation guides, and other meeting resources,
- Print and ship materials to meetings, and
- Attend event activities and provide staff to support event set-up and as necessary, facilitation.

Method of Payment

NACCHO will pay the selected contractor in a series of installments of up to \$30,000, based on a schedule of deliverables. Payments will be made upon receipt of deliverables.

Deliverables

The selected consultant will enter into a contractual agreement with NACCHO to complete the deliverables specified below. NACCHO will disburse funds according to completion of the assigned deliverables. NACCHO will provide a payment schedule in accordance with the assigned completion percentage. Please note: NACCHO reserves the right to make changes to the project timeline and payment schedule if necessary.

The following outlines the deliverables to be produced by the consultant; however, a finalized scope of work will be agreed upon post consultant selection.

Invoices Due By or Before	Deliverable Description	Deliverable Submission	Payment Schedule (% of Total Budget)
Invoicing Period 1: NOA – 5/31/23 Due: June 1, 2023	1a. Review the program participant materials and past evaluations of meetings held by participant programs.	1) Short summary of planning goals	5%
	1b. Lead a small planning committee including the HEOP project leads. In coordination with NACCHO determine frequency of conference calls and roles of committee members.	1) Plan for gathering participant input 2) Planning call schedule and list of planning committee members with roles defined 3) Project timeline	5%
	1c. With interested parties, design the agenda based on the needs of program participants.	1) Draft event agenda	10%
	1d. Support initial outreach and communication with identified speakers and other participants (draft invitation, draft details for registration site, etc.)	1) Copy of final communication to participants 2) List of identified and confirmed speakers	15%
	2a. Develop meeting-specific agendas, slides, facilitation guides, tech guidance, and other meeting resources (information on participants, speakers) as needed in conjunction with planning committee.	1) Internal annotated agenda with facilitation guides 2) Participant packets	10%
Invoicing Period 2: 6/1/23– 7/31/23 Due: August 1, 2023	2b. Coordinate and lead preparatory sessions for meeting speakers and facilitators.	1) List of calls and participants	5%
	3a. Facilitate an in-person meeting unless the decision is made by CDC, NACCHO, and the consultant to hold these meetings virtually based on COVID-19 health and safety	1) Final participant agenda	25%



	considerations. If the meetings are virtual, the consultant will be expected to adapt all meeting materials to best fit a virtual environment.		
	3b. Work with NACCHO’s Research & Evaluation team to develop a meeting evaluation tool.	1) Meeting evaluation survey	10%
	4a. Draft and distribute any relevant follow-up materials generated during the meeting.	1) Post-meeting email to participants	2%
	4b. Hold a post-meeting call with the planning committee.	1) Meeting agenda	3%
	4c. Provide brief written report that summarizes key themes, lessons learned, and recommendations for the future.	1) Summary report	10%

IV. Proposal Criteria

The proposal must outline the following information:

- A. Cover Page** – Include relevant background and contact information.
- B. Proposal Narrative**
 - a. **Organizational Background:** Describe your organization's mission and structure and explain why your organization qualifies to be responsive to the requirements of this RFP.
 - b. **Qualifications & Experience:** Describe your qualifications and experience providing similar goods or services related to meeting design and facilitation, as required in this RFP. Provide resume or CV of key personnel with sufficient detail to demonstrate knowledge, skills, and abilities to perform the functions outlined in the RFP (will not be counted towards page limit). Include any experience in health equity and overdose response and prevention or adjacent fields.
 - c. **Methodology:** Describe, in detail, your proposed methodology for meeting all project requirements, including facilitation approach for meetings and tools for planning in-person events or meetings.



- d. **Project Deliverables & Timeline:** Provide a realistic work plan, including intermediate steps for achieving project requirements, expected product deliverables, and timeline for completion.
- C. **Budget and Budget Narrative Proposal** – Provide a line-item [budget](#), not to exceed \$30,000, that clearly outlines the dollar amount, percentage of total budget, and a [narrative cost justification](#) for each line item. Please include travel costs to the event in July and restrict costs to labor and travel. Other project needs will be provided by NACCHO, as needed. If you have a question about inclusion of other budget line items, please reach out to Ronique Taffe (rtaffe@naccho.org).
 - a. **Respond to the following two questions at the end of the budget narrative:**
 - i. Do you have prior experience in Federal Contracting? (answer does not disqualify)
 - ii. Have you completed a Single Audit? (answer does not disqualify)
- D. **Attachments** – Please include the following attachments with your application:
 - a. [Vendor Information Form](#).
 - b. [W-9](#).
 - c. [Non-Debarment Form](#).
 - d. Proof of **active** registration with SAM.gov and a DUNS number. Proof may include an email confirmation or screenshot that registration is active. Emails or other documentation that registration is in process or pending is not sufficient. Note that registration with SAM.gov can take up to 6-8 weeks, so please register as soon as possible. Registration is free.
 - e. Resumes/CVs of key staff members.
 - f. Required for applications of \$25,000: [FFATA form](#) (if unable to complete this by the application deadline, it may be submitted one week after notice of selection).
 - g. At least one example of previous work developed that demonstrates the capability to produce the work proposed through this RFP.

V. Submission Instructions

To submit proposals for this request, applicants should:

1. Review the requirements and expectations outlined in this RFP.
2. Read NACCHO's [standard contract](#) and provide a copy to the individual with signing authority in your organization, including any relevant financial or legal offices for advanced consideration. Selected organizations must agree to the contract language and be able to sign and return a contract to NACCHO within approximately 30 days of receiving it. No modifications will be made.
3. Submit an application that must include the following items to be deemed completed:
 - a. Cover Page.
 - b. Proposal Narrative (3-5 pages) that includes the elements referenced above.
 - c. Budget ([template provided](#)) and brief [budget narrative](#) (no more than 1 page).
4. Complete the required attachments referenced above.
5. Applications should be emailed to the OIVP mailbox (ivp@naccho.org), in PDF format, one e-mail using the subject line **“Health Equity Symposium Meeting Planning and Facilitation RFP”** by **11:59 PM Eastern on Friday, March 3rd, 2023**. Submissions after this deadline will not be considered.



6. NACCHO will confirm receipt of all applications; however, confirmation of receipt does not guarantee verification of completeness. All applicants will be notified of their status **on or around the week of March 13th, 2023.**

VI. Selection Process

Each proposal will be reviewed and rated on the following elements:

- **Understanding of Project Purpose and Goals:** Applicant has a clear understanding of the project goals and deliverables.
- **Relevant Personnel Experience:** Applicant has clearly documented evidence of their (and that of the proposed project staff) relevant knowledge, skills, abilities, and experience.
- **Proposed Approach:** The proposal includes a clear, feasible, and appropriate plan to effectively meet the goals and deliverables of the project. The proposal includes a reasonable timeline with all deliverables completed within the project period.
- **Budget:** The proposal includes a detailed, line-item budget justifying the proposed expenses, and the expenses are appropriate for the purposes of the deliverables.

Please note that submission of a proposal is a statement of acceptance of NACCHO's standard form contract. If any items cannot be accepted, these issues need to be resolved prior to submitting a proposal.

The deadline for submission is **Friday, March 3rd, 2023 at 11:59 pm Eastern Time.** Proposals should be submitted electronically, in PDF format, via e-mail to IVP@naccho.org.

