REQUEST FOR PROPOSAL

NACCHO Research and Evaluation Strategic Planning Facilitation

National Association of County and City Health Officials (NACCHO)

12/15/21

SUMMARY INFORMATION

Project Title: NACCHO Research and Evaluation Strategic Planning Facilitation
Proposal Due Date and Time: 1/07/22
Selection Announcement Date: 1/14/22
Source of Funding: NACCHO
Maximum Funding Amount: $5,500
Estimated Period of Performance: 1/28/22 to 3/4/22
Point of Contact for Questions Regarding this Application: aalford@naccho.org
Special condition of this award:

OVERVIEW

The National Association of County and City Health Officials (NACCHO) is the voice of the approximately 2,800 local health departments (LHDs) across the country. These city, county, metropolitan, district, and Tribal departments 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. Additionally, NACCHO advocates on behalf of LHDs with federal policymakers for adequate resources, appropriate public health legislation, and sensible policies to address the myriad of challenges facing communities.

NACCHO is pleased to offer a funding opportunity for a skilled facilitator to aid the NACCHO Research and Evaluation team in engaging a strategic planning process. One award of up to $5,500 is available. Selections will be made 1/14/22 and the project period will run from the date of contract execution to 3/4/22. Applications must be submitted no later than 5:00PM Eastern, January 7, 2022**.** All necessary information regarding the project and application process may be found in this Request for Proposal. Applicants may pose individual questions to NACCHO at any point during the application process by e-mailing Aaron Alford (aalford@naccho.org).

ELIGIBILITY AND CONTRACT TERMS

This RFP is open to all qualified contractors.

Agreement with NACCHO standard contract terms and conditions is a requirement. **No modifications to the terms or contract language will be made. Contractors that cannot agree to NACCHO's contract language should not apply for this initiative**. As part of the application, the contractor will be asked to verify that he has read NACCHO's standard contract language and has provided a copy to the individual with signing authority at your organization for advanced consideration. If you are an applicant from Florida, please contact NACCHO immediately for a copy of the Florida standard contract.

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

Schedule of Events

Please note the following deadlines and events for this application:

Event	Date/Time
Submission Deadline	1/07/22
Award Notification Date	1/14/22
Anticipated Contract Start Date	1/28/22
Anticipated Contract End Date	3/4/22

Project Goals & Technical Requirements

The National Association of County and City Health Officials (NACCHO) is seeking one (1) expert facilitator or facilitator team to create and facilitate a 3-year strategic planning process for the Research and Evaluation (R&E) team. The facilitator will engage with R&E staff to plan up to three (3) sessions to, ultimately, develop a team mission, values, and 3-year strategic plan. Consultants will be remunerated up to $5,500 for this scope of work, paid upon completion.

Objectives

To conduct a successful strategic planning process with the full R&E team and executive stakeholders, *in a way that*:

- Ensures all voices are heard in a safe and equitable way
- Encourages and supports creativity, constructive conflict, and mutual support
- Allows us to discuss-debate-agree critical topics as a team
- Builds trust, understanding, and a common vision for the next three (3) years as we engage in creative tension
- Allows us to define NACCHO's current ecosystem and clarify the likely trajectory of the field for the next three (3) years
- Allows us to identify Team strengths and weaknesses
- Identifies a shared overarching goal/vision and Team values, and enables us to understand how each team members' work aligns with the values and contributes to the goals
- Identifies three (3) to five (5) Team Priorities, complete with owners and clear success criteria
- Identifies clear statements of how the Research team and Evaluation team interact/benefit/support the overall R&E team priorities

So that, we empower the R&E team to intentionally shape its future development and prioritize effort. That includes empowering the Team by:

- Knowing where it is going, thanks to a collaboratively developed roadmap for the next three (3) years.
- Collaboratively planning what steps to take to arrive safely at our goals.

- Knowing what resources are needed.
- Collaboratively deciding who is responsible for each task and when they are responsible for delivering work products.
- Reducing uncertainty and unnecessary work/burden.
- Providing a framework for directing resources to high priority tasks and a framework for refusing low priority work, commitments, and requests.
- Ensuring we have a common goal/vision that guides us as we engage in conflict, creativity, and mutual support.

Scope of Work (SOW)

Required project activities are listed below.

- Plan, lead, and facilitate planning activities
    - Engage the Team's leadership in up to three (3) 1-hour planning sessions throughout the course of the engagement
    - Design interactive tools for facilitation
- Facilitate strategic planning sessions
    - Bring the FULL R&E team together for up to two (2) half-day sessions (in-person)
    - Re-engage the FULL R&E team for two (2) 1.5-hour clarifying/finalizing sessions (Zoom)
- Draft Strategic Plan document outline
    - Work with the Team's leadership to shape outline of draft document
    - Condense outputs from strategic planning sessions into the outline
- Review final Strategic Plan document
    - Work with the Team's leadership to transform outline into a Strategic Plan document, ensuring the final document accurately reflects the planning process

Method of Payment

NACCHO will pay the selected the contractor in a single installment of up to $5,500, upon acceptance of the final Strategic Plan document. Please note that NACCHO reserves the right to make changes to the project timeline and payment schedule if necessary.

NACCHO Support

NACCHO staff will serve as a resource to the contractor to ensure adequate completion of the SOW and achievement of project goals by fulfilling the following responsibilities:

- The NACCHO R&E Team's leadership will participate in up to three (3) 1-hour planning sessions throughout the course of the engagement. This will include reviewing facilitation tools and approach.
- The FULL R&E team will actively engage in up to four (4) facilitated sessions.
- The Team's leadership will draft the full outline of document strategic plan document with input from the facilitator.
- The Team's leadership will work with the facilitator in completing the strategic plan document and ensuring the final document accurately reflects the outputs of the planning process.

PROPOSAL RESPONSE FORMAT & SELECTION CRITERIA

The proposal must outline the following content:

A. **Cover Page (10 pts)** – Include relevant background and contact information.
B. **Qualifications & Experience (20 pts)** – Describe your qualifications and experience providing similar goods or services related to facilitation and strategic planning, as required in this RFP. Provide resume or CV of sufficient detail to demonstrate knowledge, skills, and abilities to perform the functions outlined in the RFP.
C. **Methodology (30 pts)** – Describe, in detail, your proposed methodology for meeting all project requirements, including facilitation approach for meetings with leadership and facilitation approach/tools for strategic planning meetings in-person.
D. **Project Deliverables & Timeline (20 pts)** – Provide a realistic work plan, including intermediate steps for achieving project requirements, expected product deliverables, and timeline for completion.
E. **Budget Proposal (20 pts) –** Using the table below, provide a line-item budget, not to exceed $5,500, that clearly outlines the dollar amount, percentage of total budget, and a narrative cost justification for each line item. Please restrict costs to labor. General facilitation materials will be provided by NACCHO, if needed.

   Allowable Expenses
   Funds may not be used for equipment purchases. Per HHS requirements, funds awarded under this RFP are prohibited from being used to pay the direct salary of an individual at a rate in excess of the current Federal Executive Schedule Level II salary cap.

F. **Respond to the following two questions at the end of the budget narrative:**
   - Do you have a prior experience in Federal Contracting? (Answer does not disqualify)
   - Have you completed a Single Audit? (Answer does not disqualify)
G. **Attachments –** Please include the following attachments with your application:
   - Budget and budget narrative (Please be brief)
   - Resumes/CVs – Provide resumes/CVs for each staff member responsible for project implementation, project management, or other positions identified in the requirements of the RFP.
   - Examples of previous work – Provide at least one descriptions and/or example of previous similar work that demonstrates your capability to produce the work outlined in the Scope of Work.

Proposal outline

A. Cover Page/Contact Information
Consultant Name
Street Address
City/State/Territory
Email
Phone
B. Qualifications & Experience

C. Methodology
D. Project Deliverables & Timeline
E. Budget Proposal
I. Attach completed budget template II. Attach completed budget narrative template
F. Response to Draft Contract
Selected applicant(s) will enter into an agreement with NACCHO. Draft agreements are available in Appendices. Review the agreement's terms and conditions—including provisions related to publications; acknowledgement of federal support; copyright interests; conference, meeting and seminar materials; and logo use for conference and other materials—with your contracts officer and confirm that if selected, you will be prepared to enter into the agreement with NACCHO, or identify and include any proposed changes with your proposal application. NACCHO reserve the right to accept or decline any proposed changes to the terms and conditions. Significant proposed changes, which could affect the agreement's timely execution, may impact your selection as a successful applicant.

SUBMISSION INSTRUCTIONS

Applications for this project should use single-spaced, Times New Roman, 12-point font, with 1" margins. Applicants should:

1. Review the requirements and expectations outlined in this RFA.
2. Read NACCHO's standard contract (Appendix A) language. No modifications will be made.
3. Submit an application that must include the following items to be deemed completed**:**
    - A cover page that contains the information outlined above
    - Narrative (no more than 5 pages) that addresses qualifications, methodology, and deliverables/timeline.
    - Anticipated budget (template provided) and budget narrative (Please be brief).
4. Applications should be emailed to Aaron Alford (aalford@naccho.org) in one e-mail using the subject line "Response to Strategic Planning RFP" by 5PM Eastern on 1/7/22. Submissions after this deadline will not be considered.
5. NACCHO will confirm receipt of all applications within two (2) business days; however, confirmation of receipt does not guarantee verification of completeness. If you do not receive confirmation within two (2) business days, please call 703-220-6850. All applicants will be notified of their status on or around 1/14/22. All questions may be directed to Aaron Alford (aalford@naccho.org).

APPENDICES

Appendix A

NACCHO CONTRACT # 2021- _ _ _ _ _ _

CONTRACTOR AGREEMENT

This Contractual Agreement is entered into, effective as of the date of the later signature indicated below, by and between the **National Association of County and City Health Officials** (hereinafter referred to as "NACCHO"), with its principal place of business at 1201 (I) Eye Street NW 4th Fl., Washington, DC 20005, and [*insert name of Contractor]* (hereinafter referred to as "Contractor"), with its principal place of business at *[insert mailing address of Contractor]*.

WHEREAS, NACCHO wishes to hire Contractor to provide certain goods and/or services to NACCHO;

WHEREAS, Contractor wishes to provide such goods and/or services to NACCHO.

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties, intending to be legally bound, do hereby agree as follows:

ARTICLE I: SPECIAL PROVISIONS

1. PURPOSE OF AGREEMENT: Contractor agrees to provide the goods and/or services to NACCHO to enhance the programmatic activities of ____ GRANT # ___, CFDA # ____, as described in Attachment I. The terms of Attachment I shall be incorporated into this Agreement as if fully set forth herein. Contractor shall act at all times in a professional manner consistent with the standards of the industry.

2. TERM OF AGREEMENT: The term of the Agreement shall begin on (*insert date*) and shall continue in effect until (insert date), unless earlier terminated in accordance with the terms herein. Expiration of the

term or termination of this Agreement shall not extinguish any rights or obligations of the parties that have accrued prior thereto. The term of this Agreement may be extended by mutual agreement of the parties.

3. PAYMENT FOR SERVICES: In consideration for professional services to be performed, NACCHO agrees to pay Contractor an amount not to exceed $ #####.00. All payments will be made within 30 days of receipt of invoice(s) from Contractor and following approval by NACCHO for approved services, as outlined on Attachment I. Three invoices must be submitted as follows:

Invoice No.	Amount	Deliverable	Due date
Invoice I			
Invoice II			
Invoice III			

NACCHO award number must be included on all invoices. Unless otherwise expressly stated in this Agreement, all amounts specified in, and all payments to be made under, this Agreement shall be in United States Dollars. The parties agree that payment method shall be made by check, via postage-paid first class mail, at the address for *the giving of notices as set forth in Section 23* of this Agreement. Any changes of payment method would require a modification signed by both parties. The final invoice must be received by NACCHO no later than 15 days after the end date of the Agreement. Contractor will be given an opportunity to revise as needed but the final revised invoice must be received no later than 30 days after the end date of the Agreement. NACCHO will not accept any invoices past 30 days of the end date of the Agreement.

ARTICLE II: GENERAL PROVISIONS

1. INDEPENDENT CONTRACTOR: Contractor shall act as an independent contractor, and Contractor shall not be entitled to any benefits to which NACCHO employees may be entitled.

2. PAYMENT OF TAXES AND OTHER LEVIES: Contractor shall be exclusively responsible for reporting and payment of all income tax payments, unemployment insurance, worker's compensation insurance, social security obligations, and similar taxes and levies.

3. INDEMNIFICATION: Contractor agrees to defend, hold harmless and indemnify NACCHO and its directors, officers, employees, representatives, agents, and contractors from and against all losses, costs, damages, claims, expenses, or other liability whatsoever (including all reasonable attorneys' fees) arising out of or connected with Contractor's services under this Agreement, including, but not limited to, any accident or injury to persons or property.

4. REVISIONS AND AMENDMENTS: Any revisions or amendments to this Agreement must be made in writing and signed by both parties.

5. ASSIGNMENT: Without prior written consent of NACCHO, Contractor may not assign this Agreement nor delegate any duties herein.

6. CONTINGENCY CLAUSE: This Agreement is subject to the terms of any agreement between NACCHO and its Primary Funder and in particular may be terminated by NACCHO without penalty or further obligation if the Primary Funder terminates, suspends or materially reduces its funding for any reason. Additionally, the payment obligations of NACCHO under this Agreement are subject to the timely fulfillment by the Primary Funder of its funding obligations to NACCHO.

7. INTERFERING CONDITIONS: Contractor shall promptly and fully notify NACCHO of any condition that interferes with, or threatens to interfere with, the successful carrying out of Contractor's duties and responsibilities under this Agreement, or the accomplishment of the purposes thereof. Such notice shall not relieve Contractor of said duties and responsibilities under this Agreement.

8. OWNERSHIP OF MATERIALS: Contractor hereby transfers and assigns to NACCHO all right, title and interest (including copyright rights) in and to all materials created or developed by Contractor pursuant to this Agreement, including, without limitation, reports, summaries, articles, pictures and art (collectively, the "Materials") (subject to any licensed third-party rights retained therein). Contractor shall inform NACCHO in writing of any third-party rights retained within the Materials and the terms of all license agreements to use any materials owned by others. Contractor understands and agrees that Contractor shall retain no rights to the Materials and shall assist NACCHO, upon reasonable request, with respect to the protection and/or registrability of the Materials. Contractor represents and warrants that, unless otherwise stated to NACCHO in writing, the Materials shall be original works and shall not infringe or violate the rights of any third party or violate any law. The obligations of this paragraph are subject to any applicable requirements of the Federal funding agency.

9. RESOLUTION OF DISPUTES: The parties shall use their best, good faith efforts to cooperatively resolve disputes and problems that arise in connection with this Agreement. Both parties will make a good faith effort to continue without delay to carry out their respective responsibilities under the Agreement while attempting to resolve the dispute under this section. If a dispute arises between the parties that cannot be resolved by direct negotiation, the dispute shall be submitted to a dispute board for a nonbinding determination. Members of the dispute board shall be the Director or Chief Executive Officer of the Contractor, the Chief Executive Officer of NACCHO, and the Senior Staff of NACCHO responsible for this Agreement. The costs of the dispute board shall be paid by the Contractor and NACCHO in relation to the actual costs incurred by each of the parties. The dispute board shall timely review the facts, Agreement terms and applicable law and rules, and make its determination. If such efforts fail to resolve the differences, the disputes will be submitted to arbitration in the District of Columbia before a single arbitrator in accordance with the then current rules of the American Arbitration Association. The arbitration award shall be final and binding upon the parties and judgment may be entered in any court of competent jurisdiction.

10. TERMINATION: Either party may terminate this Agreement upon at least fifteen (15) days prior written notice to the other party. NACCHO will pay Contractor for services rendered through the date of

termination.

11. ENTIRE AGREEMENT: This Agreement contains all agreements, representations, and understandings of the parties regarding the subject matter hereof and supersedes and replaces any and all previous understandings, commitments, or agreements, whether oral or written, regarding such subject matter.

12. PARTIAL INVALIDITY: If any part, term, or provision of this Agreement shall be held void, illegal, unenforceable, or in conflict with any law, such part, term or provision shall be restated in accordance with applicable law to best reflect the intentions of the parties and the remaining portions or provisions shall remain in full force and effect and shall not be affected.

13. GOVERNING LAW: This Agreement shall be governed by and construed in accordance with the laws of the District of Columbia (without regard to its conflict of laws provisions).

14. ADDITIONAL FUNDING: Unless prior written authorization is received from NACCHO, no additional funds will be allocated to this project for work performed beyond the scope specified or time frame cited in this Agreement.

15. REMEDIES FOR MISTAKES: If work that is prepared by the Contractor contains errors or misinformation, the Contractor will correct error(s) within five business days. The Contractor will not charge NACCHO for the time it takes to rectify the situation.

16. COMPLIANCE WITH FEDERAL LAWS AND REGULATIONS: Contractor's use of funds under this Agreement is subject to the directives of and full compliance with 2 CFR Part 200 (Uniform Administrative Requirements, Costs Principles, and Audit Requirements for Federal Awards, and 45 C.F.R. Part 75 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards), It is the Contractor's responsibility to understand and comply with all requirements set forth therein.

17. EQUAL EMPLOYMENT OPPORTUNITY: Pursuant to 2 CFR 200 Subpart D , Contractor will comply with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 C.F.R. part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

18. DEBARRED OR SUSPENDED CONTRACTORS: Pursuant to 2 CFR 200 Subpart C , Contractor will execute no subcontract with parties listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension."

19. LOBBYING RESTRICTIONS AND DISCLOSURES: Pursuant to 2 CFR 200 Subpart E, Contractor will certify to NACCHO using the required form that it will not and has not used Federal appropriated funds to

pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Contractor will also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award.

20. COMPLIANCE WITH FEDERAL ENVIRONMENTAL REGULATIONS: Pursuant to 2 CFR 200 Subpart F , Contractor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251 et seq.).

21. WHISTLEBLOWER PROTECTION: Pursuant to 41 U.S.C. 4712 employees of a contractor, subcontractor, or subrecipient will not be discharged, demoted, or otherwise discriminated against as reprisal for "whistleblowing."

22. EXECUTION AND DELIVERY: This Agreement may be executed in two or more counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same Agreement. The counterparts of this Agreement and all Ancillary Documents may be executed and delivered by facsimile or electronic mail by any of the parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or electronic mail as if the original had been received.

23. NOTICE: All notices, including invoices, required to be delivered to the other party pursuant to this Agreement shall be in writing and shall be sent via facsimile, with a copy sent via US mail, postage prepaid, to the parties at the addresses set forth below. Either party may send a notice to the other party, pursuant to this provision, to change the address to which notices shall be sent.

FOR NACCHO:

National Association of County and City

Health Officials

Attn: _____

[Name of Program Staff]

1201 (I) Eye Street NW 4th Fl.,

Washington, DC 20005

Tel. (202) _____

With a copy to:

National Association of County and City Health Officials

Attn: Ade Hutapea, LL.M., CFCM

Lead Contracts Administrator

1201 (I) Eye Street NW 4th Fl.,

Washington, DC 20005

Tel. (202) 507-4272

Fax (202) 783-1583

Fax (202) 783-1583 Email: ahutapea@naccho.org

Email: _____@naccho.org

FOR CONTRACTOR:

(Name and address of Contractor's Contract Officer or Designee, including telephone and fax.)

IN WITNESS WHEREOF, the persons signing below warrant that they are duly authorized to sign for and on behalf of, the respective parties.

AGREED AND ACCEPTED AS ABOVE:

NACCHO: **CONTRACTOR:**

By: _____ By: _____

Name: Jerome Chester_____ Name: _____

Title: Chief Financial Officer Title: _____

Date: _____ Date: _____

Federal Tax ID No:

NATIONAL ASSOCIATION OF COUNTY AND CITY HEALTH OFFICIALS

CONTRACTOR AGREEMENT – ATTACHMENT I

SCOPE OF WORK

[Insert Scope of Work]