
Request for Proposal

Request for Proposals for
Organizational Assessment Services



Wake County, North Carolina
Procurement Services
P.O. Box 550
Raleigh, North Carolina 27602

RFP # 22-083

Proposals are due:

September 20, 2022 by 2:00 pm Eastern

Table of Contents

1	Introduction	
1.1	Introduction	
1.2	County Background	
1.3	Scope of Services	
1.4	Minimum Qualifications	
1.5	General Bidding Requirements	
2	General Submittal Requirements	
2.1	Proposal Contact	
2.2	Proposal Submittal Requirements	
2.3	Proposer Expenses	
2.4	Interpretations, Discrepancies and Omissions	
2.5	Tentative Schedule	
2.6	General Clarifications and Questions	
2.7	Finalists and Interviews	
2.8	Award	
2.9	Non-disclosure of County Information	
2.10	Retention of Proposer Material	
3	General Terms and Conditions	
3.1	Certification	
3.2	Conflict of Interest	
3.3	Assignment	
3.4	Indemnification	
3.5	Independent Contractor	
3.6	Payment	
3.7	Insurance	
3.8	Governing Law	
3.9	Confidential Information/Public Records Law	
3.10	Compliance with Laws and Regulations	
3.11	Acceptance	
3.12	Additional Services	
3.13	E-Verify	
3.14	Iran Divestment Act	
3.15	Federal Uniform Guidance	
3.16	Anti-Discrimination	
4	Detailed Submittal Requirements	
4.1	Proposal Format	
4.2	Executive Summary	
4.3	Scope of Services	
4.4	Background and Experience	
4.5	Client References	
4.6	Cost Proposal	
5	Evaluation Criteria	
5.1	Selection Participants.....	
5.2	Evaluation of Proposals.....	

1 Introduction

1.1 Introduction

Wake County, North Carolina (“The County”) is seeking proposals for an organizational assessment of employee engagement including perception of workplace culture, happiness and satisfaction, and impacts on the ability to attract talent and organization performance. Throughout this request for proposals (“RFP”), the “Proposer” refers to qualified firms that submit Proposals and the “Consultant” refers to the Proposer who is selected to provide the services described within this RFP.

The Wake County turnover rate for calendar year 2021 was 16.4%, the highest turnover rate experienced by Wake County in recent history. While numerous factors, including the ultra-competitive job market and evolving economy, may have been a factor, Wake County wishes to determine what effect the current organizational culture may have had on this and other key organizational metrics.

Similar types of assessments have been conducted for two individual departments, but no county-wide survey has been conducted. Wake County is seeking to engage with a provider to conduct an assessment of employee engagement, satisfaction, management/leadership effectiveness and working environment in an effort to identify strengths and opportunities for improvement as well as tools to address those identified issues.

1.2 County Background

Wake County is the most populous county in North Carolina. The County consists of 14 municipalities and includes Raleigh, the County seat and State capital. The County’s population is over 1 million residents. The County’s General Fund budget is currently \$1.57 billion and the County employs approximately 4,200 benefit-eligible employees. Wake County operates on a July 1 – June 30 fiscal year.

The County’s elected officials consist of seven County Commissioners, the County Sheriff, and the County Register of Deeds. The County has 23 Departments which provide a variety of services both externally to citizens and internally to our workforce. Our workforce is made up of over 4,200 employees in over 750 different job titles.

1.3 Scope of Services

Proposed deliverables are to include:

1. Submitting a plan to include development and implementation of an organizational assessment of morale and agency climate, which will include employee surveys and follow up focus groups;
2. Assisting with the development of a communication plan to keep individuals informed of the project;
3. Use of existing, state of the art technology tools (for example: existing computer-based survey tools; QR code assessable surveys; web-based surveys; teleconferencing for meetings; dash boarding results) as well as face to face, onsite focus groups, and virtual focus groups to obtain employee feedback;
4. Achieving an 85% survey participation and feedback rate for the 4,200 Wake County employees, including employees of all 23 departments;
5. Engaging the designated project team in the development and implementation of all survey methodology;

6. Analyzing the data and information received through surveys and developing a comprehensive report with recommendations for addressing areas with opportunity for improvement. The final report should include data on the organization as a whole, but also department based, race and ethnicity, gender, and tenure data on key elements of the survey;
7. Benchmarking survey results with other comparable government or business units of comparable size and function.

It is expected that this process will begin January 2023. The Proposer should include a timeline indicating milestone dates to deliver a final report..

1.4 Minimum Requirements

Proposer must meet the following minimum qualification:

Proven experience working with governmental and/or private industry organizations similar in size to Wake County or larger.

1.5 General Bidding Requirements

When responding to this RFP, please follow all instructions carefully. Please submit proposal contents according to the outline specified and submit documents according to the instructions. Failure to follow these instructions will be considered a non-responsive proposal and may result in immediate elimination from further consideration.

By submitting a proposal, Proposers acknowledge that:

- 1.5.1 The County reserves the right to reject any or all proposals if it determines that select proposals are not responsive to the RFP. The County reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select Proposers at any time to gather additional information.
- 1.5.2 Proposals will be received by Wake County Government at the time noted on the cover page of this document. At that point, Wake County will close the receipt of proposals and begin the evaluation process. The only information that will be released will be the names of the respondent(s). No other information will be disclosed, except as required by the evaluation process, until a contract is awarded.

Wake County, solely at its option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Proposers are not to contact any county staff or elected official in reference to the process due to the nature of a competitive environment and to protect the integrity of the RFP process. As information becomes available and is relevant for release, that information will be shared with respondents.

Wake County, solely at its option, may disclose the name(s) of any firms or companies being considered or elevated during the process. Proposers are not to contact any county staff or elected official in reference to the process due to the nature of a competitive environment and to protect the integrity of the RFP process. As information becomes available and is relevant for release, that information will be shared with respondents.

2 General Submittal Requirements

2.1 Proposal Contact

This RFP and any subsequent action taken as a result thereof is issued by the Wake County Procurement Services in accordance with North Carolina General Statutes on behalf of the County. Proposal responses should be directed to Procurement Services, specifically to the Purchasing Director, as outlined below. In regards to this RFP and subsequent procurement process, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, elected official, or Board of Commissioner members during the period beginning with the issuance of this document through approval of award unless authorized by the proposal contact. ***Any attempt by a Proposer to contact or influence a member or members of the aforementioned will result in the immediate disqualification of the Proposer from award for items or services on this RFP.***

Proposal Contact
Melissa England Wake County Finance / Procurement Services melissa.england@wakegov.com 919-856-6327

2.2 Proposal Submittal Requirements

Vendors are required to prepare their proposals in accordance with the instructions outlined in this part and elsewhere in this RFP. Each Vendor is required to submit its proposal in a sealed package.

Submit one (1) signed original, one (1) complete copy, and one (1) electronic version on a secure jump drive, of the proposal in a sealed envelope to the address shown below.

Mailing Address:
Melissa England
Wake County Finance / Procurement Services
Wake County Justice Center, 2nd Floor, Rm 2900
301 S. McDowell Street
Raleigh, NC 27602
melissa.england@wakegov.com
919-856-6327

The County must receive proposals no later than **2:00 PM on September 20, 2022**. The Vendor's name, RFP number, and proposal closing time and date must be marked clearly on the proposal submission. The time of receipt shall be determined by the time clock in the Wake County Procurement Services office. The County will not be held responsible for the failure of any mail or delivery service to deliver a proposal response prior to the stated proposal due date and time. It is solely the Vendor's responsibility to: (1) Ascertain that they have all required and necessary information, documents, and addenda, prior to submitting a response; (2) Ensure that the response is received at the correct location and time. Late responses, regardless of delivery means, will not be accepted. Fax or email responses will not be accepted.

2.3 Proposer Expenses

The County will not be responsible for any expenses incurred by any Proposer in the development of a response to this Request for Proposal or any other activities associated with this procurement including but not limited to any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to Wake County and/or its representatives. Further, the County shall reserve the right to cancel the work described herein prior to issuance and acceptance of any

contractual agreement/purchase order by the recommended Proposer even if the Board of Commissioners has formally accepted a recommendation.

2.4 Interpretations, Discrepancies, and Omissions

Should any Proposer find discrepancies, omissions or ambiguities in this RFP, the Proposer must request an interpretation in writing. The deadline for submitting questions is September 2, 2022, by 5:00 PM. All questions will be answered to the extent possible in the form of addenda to the specifications. The addenda will be available by September 7, 2022. All written requests for clarification should be addressed to the attention of proposal contact listed in Section 2.1.

Failure to request an interpretation will be considered evidence that the Proposer understands the provision of the RFP.

The issuance of a written addendum is the only official method by which interpretation, clarification or additional information will be given by the County. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarification will be without legal effect. It is the County's intent not to issue any addenda after September 7, 2022.

2.5 Tentative Schedule

Date	Event
8/26/2022	Distribution of Request for Proposal
9/2/2022 by 5pm	Addenda Requests and General Clarifications and Questions Due
9/7/2022	Responses to Addenda Requests Posted on Website
9/20/2022 by 2pm	Responses Due by 2:00 pm
October and November 2022	Finalist Interviews
December 2022	Selection and Notification of Vendors
1/1/2023	Contract(s) Commences

2.6 Pre-Proposal Questions

The County will also make a good faith effort to provide other data or attachments, if the request will further clarify the project's scope. All requests for further information shall be received by the County by September 2, 2022, before 5:00 PM EST. A copy of all answers and further clarifications provided by the County to those making inquiries will be posted as an addendum to the RFP on the County's website on September 7, 2022.

2.7 Finalists and Interviews

From the proposals received, the County may identify a short-list of finalists. The finalists will be expected to make a presentation to and respond to questions from the County. Additional information regarding the content of the presentation will be provided to the selected finalists.

2.8 Award

Wake County reserves the right to award a contract, based on initial offers received from Proposers, without discussion and without conducting further negotiations. Under such circumstance, the acceptance of a proposal by the County shall be deemed to be an acceptance of an offer and that such acceptance will be binding upon both parties. The County may also, at its sole discretion, have discussions with those Proposers that it deems to fall within a competitive range. The County may enter into negotiations separately with such Proposers. Negotiations with a Proposer may continue with a

Proposer that the County has tentatively selected to award a contract to. The County shall not be deemed to have finally selected a Proposer until a contract has been successfully negotiated and signed by both parties.

2.9 Non-disclosure of County Information

The Proposer and its agents shall treat all data and information gathered by the Proposer and its agents, including this RFP and all reports, recommendations, specifications, and data as confidential. The Proposer and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, propaganda, and/or in another job or jobs, unless written consent is obtained from the County.

2.10 Retention of Proposer Material

Any and all information submitted in conjunction with this RFP and the evaluation process will not be returned to the respondent.

3 General Terms and Conditions

3.1 Certification

The Proposer hereby certifies that it has carefully examined this Request for Proposal and the Proposer certifies that it understands the scope of the work to be done and that the Proposer has knowledge and expertise to provide the scope of the work. By signature on the response to the RFP, the Proposer certifies that its proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud, so that all proposals for the purchase will result from free, open and competitive proposing among all vendors. Further, the Proposer certifies that it understands that collusive bidding/proposing is a violation of Federal law and can result in fines, prison sentences, and civil damage awards.

3.2 Conflict of Interest

By submission of a response, the Proposer agrees that at the time of submittal, it: (1) has no interest (including financial benefit, commission, finder's fee, or any other remuneration) and shall not acquire any interest, either direct or indirect, that would conflict in any manner or degree with the performance of Proposer's services, or (2) will not benefit from an award resulting in a "Conflict of Interest." A "Conflict of Interest" shall include holding or retaining membership, or employment, on a board, elected office, department, division or bureau, or committee sanctioned by and/or governed by Wake County. Proposers shall identify any interests, and the individuals involved, on separate paper with the response and shall understand that the County, in consultation with legal counsel, may reject their proposal.

3.3 Assignment

No assignment of the Proposer's obligations or the Proposer's right to receive payment hereunder shall be permitted without prior consent of the County. The Proposer may not sell, assign, transfer or convey the contract resulting from this RFP, in whole or in part, without the prior written approval from the County.

3.4 Indemnification

The Consultant will indemnify and hold the County harmless from any and all liability, expense, judgment, suit, or cause of action for personal injury, death, or direct damage to tangible property which may accrue against the County to the extent it is caused by the negligence of Consultant, its sub-consultants, or their employees or agents, while performing duties under this Agreement, provided that the County gives the Consultant prompt, written notice of any such claim or suit. The County shall cooperate with Consultant in its defense or settlement of such claim or suit. This section sets forth the full extent of the Consultant's

general indemnification of the County from liabilities that are in any way related to Consultant's performance under this Agreement.

3.5 Independent Contractor

It is understood that in the performance of any services herein provided, the Proposer shall be, and is, an independent contractor, and is not an agent or employee of the County and shall furnish such services in its own manner and method, except as required by this contract. Further, the Proposer has, and shall retain the right to exercise full control over the employment, direction, compensation, and discharge of all persons employed by the Proposer in the performance of the services hereunder. The Proposer shall be solely responsible for, and shall indemnify, defend, and hold the County harmless, from all matters relating to the payment of its employees, including compliance with Social Security, withholding, and all other wages, salaries, benefits, taxes, exactions, and regulations of any nature whatsoever.

3.6 Payment

Payment for the services rendered pursuant to the Agreement resulting from this RFP shall be made in amounts and at times set forth in the Agreement and shall be made upon receipt of original invoice(s) in accordance and in conformity with payment dates for bills and claims as established by the County. Prior to payment, the Consultant must submit an original dated itemized invoice of services rendered. (Photographs or facsimiles of invoices will not be accepted.) Any reimbursement for expenses as allowed in the Agreement that are included in the invoice(s) must be supported with attached original billings for such expenses.

3.7 Insurance

Proposers shall obtain, at their sole expense, all insurance required in the following paragraphs and shall not commence work until such insurance is in effect and certification thereof has been received by Wake County's Risk Manager.

Workers' Compensation Insurance, with limits for Coverage A: Statutory for State of North Carolina, and Coverage B - Employers Liability: \$500,000 each accident/disease each employee/disease policy limit.

Commercial General Liability - with limits no less than \$1,000,000 per occurrence and \$2,000,000 aggregate, including contractual liability.

Commercial Automobile Liability, with limits no less than \$1,000,000 per accident for bodily injury and property damage for any vehicle used during performance of contract services, including coverage for owned, hired, and non-owned vehicles. Evidence of commercial automobile coverage is only necessary if vehicles are used in the provision of services under this Agreement or are brought on a Wake County site.

Professional Liability Insurance, applicable to any professional services provided under this Contract with limits of no less than \$1,000,000 per claim and \$2,000,000 aggregate.

Cyber Liability Insurance, with limits not less than \$3,000,000 per claim. Coverage shall be sufficiently broad to respond to the duties and obligations undertaken by Provider in this Agreement regarding sensitive information in any form in Provider's care, custody, or control, or for which Provider is legally responsible, and shall include but not be limited to third party liability coverage for loss resulting from denial of service, unauthorized access, security failure, system failure, extortion, or any failure to prevent disclosure of sensitive information, including but not limited to personal identifying information or protected health information. Breach/crisis response cost coverage must include actions required by federal and/or state statutes, and include but not be limited to notification, call center costs, regulatory fines and penalties, investigation, and identity theft and credit monitoring services, with limits sufficient to respond to these obligations

If any coverage is on a claims-made basis, Provider agrees to maintain a retroactive date prior to or equal to the effective date of this Agreement and to purchase and maintain Supplemental Extended Reporting

Period or 'tail coverage' with a minimum reporting period of not less than three (3) years if the policy expires or is cancelled or non-renewed. If coverage is replaced, the new policy must include full prior acts coverage or a retroactive date to cover the effective dates of this Agreement. Provider shall provide a Certificate of Insurance annually to Wake County indicating any claims made coverage and respective retroactive date. The duty to provide extended coverage as set forth herein survives the effective dates of this Agreement.

All insurance companies must be authorized to do business in North Carolina and have an AM Best rating of "A-/VII" or better; or have reasonable equivalent financial strength to the satisfaction of the County's Finance Office. Proof of rating shall be provided to the county upon request.

Insurance with limits no less than those specified above shall be evidenced by a Certificate of Insurance issued by a duly authorized representative of the insurer and dated no more than thirty (30) days prior to the start date of this agreement. In the case of self-insurance, a letter of explanation must be provided to and approved by Wake County Risk Management.

The Provider shall be responsible for providing immediate notice of policy cancellation or non-renewal during the term of this Agreement to the Wake County Finance Office and for three years subsequent for any claims made coverage.

If Provider does not meet the insurance requirements specified above, alternate insurance coverage satisfactory to Wake County may be considered. Any requests for consideration of alternate coverage must be presented by Provider PRIOR TO provision of any services associated with this Agreement.

In the event that Provider is permitted by Wake County to use subcontractors to perform any of the services under this Agreement, then and in that event, Provider shall contractually require such subcontractor(s) to meet all of the requirements of this section.

3.8 Governing Law

This RFP and any contract resulting therefrom shall be governed by and construed according to the laws of the State of North Carolina. Should any portion of any contract be in conflict with the laws of the State of North Carolina, the State laws shall invalidate only that portion. The remaining portion of the contract(s) shall remain in effect.

3.9 Confidential Information/Public Records Law

INFORMATION SUBMITTED IN RESPONSE TO REQUESTS FOR BIDS, PROPOSALS, AND OTHER PROCUREMENT METHODS SUBJECT TO PUBLIC RECORDS LAW

Wake County is subject to North Carolina's Public Records Act located in Chapter 132 of the North Carolina General Statutes. As a result, information submitted to and received by Wake County in response to a Request for Proposal/Request For Bid/Request For Quote/Request for Qualifications, or any other procurement method (collectively "Procurement Process"), is considered public record and may be released for public inspection after the contract award, or as otherwise permitted under NCGS § 143, without further notice to the proposer. The County does not intend to elicit confidential or trade secret information in response to a Procurement Process and assumes no responsibility for the submission of such information. Wake County reserves the right to share any information submitted in response to a Procurement Process with any person(s) or firm(s) involved in the review and evaluation phase of the Procurement Process.

CONFIDENTIAL OR TRADE SECRET INFORMATION

If a proposer nonetheless submits information in a bid proposal or other response to a Procurement Process and it considers such information to be confidential, then all four requirements of [NCGS 132-1.2](#) "Confidential Information" must be met for the County to consider withholding the information from public inspection in response to a public records request. **Among other legal requirements, information deemed to be "confidential" or "trade secret" by proposer must be clearly marked as such on the face of the document(s) at the time of the initial**

disclosure/submittal of RFP. In addition, although not required by law, Wake County requests that any proposer who submits a proposal or response containing any such designation of confidentiality also submit a second copy of the proposal or response with the respective page(s) or section(s) redacted. The County will not agree to withhold an entire proposal or response from public inspection; thus proposers should refrain from including blanket restrictions on disclosure or all-encompassing claims of confidentiality.

When a public records request is made for information contained in or attached to a proposal or response that has been clearly marked as “trade secret” or “confidential” upon its submission, Wake County may, in its discretion and without further notice, release the redacted copy of the proposal or response to the requester if one has been previously submitted. Otherwise, the proposer will be notified of the request and given an opportunity to provide within a reasonable period a written explanation of the basis for claiming protection under N.C.G.S. 66-152 and N.C.G.S. 132-1 and/or a redacted proposal or response. The County shall make the final determination on release of the information. Should any civil action be brought against the County in an effort to compel or prevent the disclosure of information contained in a proposal or response that is deemed confidential by a proposer, the proposer may participate at its own expense; and by deeming any information in a proposal or response confidential, proposer further agrees to indemnify and hold harmless the County for and against any costs incurred by the County as a result of such litigation, including but not limited to fees or expenses arising out of N.C.G.S. 66-153 and N.C.G.S. 132-9.

3.10 Compliance with Laws and Regulations

Proposer must comply with all applicable State and Federal Laws. In the event any Governmental restrictions may be imposed which would necessitate alteration of the material, quality, workmanship or performance of the items offered on this proposal prior to their delivery, it shall be the responsibility of the successful Proposer to notify Wake County at once, indicating in their letter the specific regulation which required such alterations. The County reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the contract.

3.11 Acceptance

Submission of any proposal indicates a Proposer’s acceptance of the conditions contained in this RFP unless clearly and specifically noted otherwise in the proposal.

Furthermore, the County is not bound to accept a proposal on the basis of lowest price, and further, the County has the sole discretion and reserves the right to cancel this RFP, and to reject any and all proposals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised specifications, if it is deemed to be in the County’s best interests to do so. The County reserves the right to accept or reject any or all of the items in the proposal, and to award the contract in whole or in part and/or negotiate any or all items with individual Proposers if it is deemed in the County’s best interest. Moreover, the County reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or not in the best interest of the County.

3.12 Additional Services

The County reserves the right to negotiate additional services with the Vendor at any time after initial contract award.

3.13 E-Verify

To ensure compliance with the E-Verify requirements of the General Statutes of North Carolina, all contractors, including any subcontractors employed by the contractor(s), by submitting a bid, proposal or any other response, or by providing any material, equipment, supplies, services, etc, attest and affirm that they are aware and in full compliance with Article 2 of Chapter 64, (NCGS64-26(a)) relating to the E-Verify requirements.

3.14 Iran Divestment Act

By signing this agreement; accepting this contract/purchase order; or submitting any bid, proposal, etc., vendors and contractors certify that as of the date of execution, receipt, or submission they are not listed on the Final Divestment List created by the NC Office of State Treasurer pursuant to [NCGS 147 Article 6E, Iran Divestment Act](#), Iran Divestment Act Certification. Vendors and contractors shall not utilize any subcontractor that is identified on the Final Divestment List. In addition, any organization defined under NCGS 147-86.80(2), Divestment from Companies Boycotting Israel, shall not engage in business totaling more than \$1,000 with any company/business, etc. that boycotts Israel. A list of companies that boycott Israel is maintained by the NC Office of State Treasurer, pursuant to NCGS 147-86.81(a)(1). Any company listed as boycotting Israel is not eligible to do business with any State agency or political subdivision of the State.

3.15 Federal Uniform Guidance

If the source of funds for this contract is federal funds, the following federal provisions apply pursuant to 2 C.F.R. § 200.326 and 2 C.F.R. Part 200, Appendix II (as applicable):

Equal Employment Opportunity (41 C.F.R. Part 60); Davis-Bacon Act (40 U.S.C. 3141-3148); Copeland "Anti-Kickback" Act (40 U.S.C. 3145); Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708); Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387); Debarment and Suspension (Executive Orders 12549 and 12689); Byrd Anti-Lobbying Amendment (31 U.S.C. 1352); Procurement of Recovered Materials (2 C.F.R. § 200.322); and Record Retention Requirements (2 CFR § 200.324).

3.16 Anti-Discrimination

In consideration of signing this Agreement, the Parties hereby agree not to discriminate in any manner on the basis of race, natural hair or hairstyles, ethnicity, creed, color, sex, pregnancy, marital or familial status, sexual orientation, gender identity or expression, national origin or ancestry, marital or familial status, pregnancy, National Guard or veteran status, religious belief or non-belief, age, or disability with reference to the subject matter of this Contract. The Parties agree to comply with the provisions and intent of Wake County Ordinance SL 2017-4. This anti-discrimination provision shall be binding on the successors and assigns of the Parties with reference to the subject matter of this Contract.

4 Detailed Submittal Requirements

4.1 Proposal Format

Proposers shall prepare their proposals in accordance with the instructions outlined in this section. Each Proposer is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFP. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. The proposal should be organized into the following major sections with tabs for each section:

<u>PROPOSAL SECTION</u>	<u>TITLE</u>
	Title Page
	Letter of Transmittal
	Table of Contents
1.0	Executive Summary
2.0	Scope of Services
3.0	Company Background
4.0	Client References
5.0	Cost Proposal

Instructions relative to each part of the response to this RFP are defined in the remainder of this section. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

4.2 Executive Summary

(Proposal Section 1.0) This section of the response should be limited to a brief narrative summarizing the Proposer's proposal. The executive summary shall, at a minimum, include an identification of the proposed project team, responsibilities of the project team, and a summary of the proposed services.

This section should highlight aspects of the proposal that make it superior or unique in addressing the needs of the County. Please note that the executive summary should identify the primary engagement contact. Contact information should include a valid e-mail address, fax number, and a telephone number.

4.3 Scope of Services

(Proposal Section 2.0) This section of the response should include a detailed discussion of the responder's overall understanding of the project and the solutions and services that can be provided to support Wake County listed in Section 1.3.

This section should include what makes the scope and services offered superior and/or unique in addressing the needs of the County.

4.4 Background and Experience

(Proposal Section 3.0) Each proposal must provide the following information about the submitting Proposer's company, so that the County can evaluate the Proposer's stability and ability to support the commitments set forth in response to the RFP. The County, at its option, may require a Proposer to provide additional support or clarify requested information.

- 4.4.1 Company Background
 - a. How long the company has been in business.

- b. A brief description of the company size and organizational structure.
- c. How long the company has been providing services to other organizations similar to the County.
- d. Any material (including letters of support or endorsement from clients) indicative of the Proposer’s capabilities.
- e. Identify any litigation or governmental or regulatory action pending against your organization that might have a bearing on your ability to provide services to the County.
- f. Describe your contractual relationships, if any, with other organizations that will provide services described in your proposal.

4.4.2 Engagement Team Experience

- a. Identify who is responsible for key roles on this project.
- b. Provide Information demonstrating the technical knowledge (including qualifications) of all key personnel such as: experience, training, certifications, etc.
- c. Include the résumés of staff that will work on the engagement and provide ongoing client support. If they are working on only certain portions of the project, please indicate this on their résumé.
- d. Given that the County will be evaluating several proposals, describe why you feel that your services, from a professional and technical perspective, are the best fit for the County environment. Describe the distinguishing features the County should know about your services and company.

4.5 Client References

(Proposal Section 4.0) The County considers references to be important in its decision to award a contract. The results of the reference check will be provided to reviewers and used in scoring the written proposal. Failure to provide this information will result in the proposal being considered non-responsive.

Please provide at least three references from current clients. Also provide at least three references from former clients who we may contact.

References should be clients similar in size and with scope of services similar to those being requested by the County. Please provide the company name, address and the name and telephone number of the contact person.

The County reserves the right to ask for additional references.

CURRENT CLIENTS	Reference #1	Reference #2	Reference #3
Company			
Contact Name			
Contact Title			
Contact Phone			
Mailing Address			
Email			
Years Working with Client			

FORMER CLIENTS	Reference #1	Reference #2	Reference #3
Company			
Contact Name			
Contact Title			
Contact Phone			
Mailing Address			
Email			
Years Working with Client			

4.6 Cost Proposal

Proposers must submit a budget estimate including total project costs, specialists' rates, costs of project support, on-site, travel expenses, possible additional expenses, etc.

The County reserves the right to contact Proposers on cost and scope clarification at any time throughout the selection process and negotiation process.

The County may award a contract based on initial offers received without discussion of such offers. A Proposer's initial offer should, therefore, be based on the most favorable terms available. The County may, however, have discussion with those Proposers that it deems to fall within a competitive range. It may also request revised pricing offers from such Proposers and make an award and/or conduct negotiations thereafter.

5 Evaluation Criteria

5.1 Selection Participants

The County has established a team to evaluate vendor responses. This team of employees will be responsible for the evaluation and rating of the proposals and conducting interviews.

5.2 Evaluation of Proposals

All proposals submitted in accordance with the terms of the RFP will be evaluated for fulfillment of the specifications and requirements for this RFP. Evaluation and selection of the vendor, as well as subsequent negotiations, will be based on information submitted in the proposals, references, and any required oral presentations.

The contract will be awarded to Proposer who best meets the needs of the County. The successful proposal will not necessarily be that with the lowest cost. A uniform selection process will be used by the County to evaluate all proposals. The evaluation outcome, the results of reference checks will be brought forward to the County's Senior Management and Board of Commissioners for final approval on the selection of the Proposer.

Responses will be evaluated based on the following criteria:

- a. Compliance with the RFP; quality, clarity and completeness of information presented, and services proposed in response to the scope of services and criteria noted within.
- b. Respondent Background, Strength, Experience in:
 1. Experience working with governmental and/or private industry organizations similar in size to Wake County
 2. Ability to successfully deliver the proposed services
- c. Client References
- d. Cost effectiveness and value of proposal
- e. Response to the Cost Proposal
- f. Rate Guarantees
- g. Vendor Flexibility