



# **Request for Proposals**

**RFP #22-101**

Consulting Services for an Unsheltered  
Homeless Facility Study

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Wake County, North Carolina

Wake County Justice Center  
301 S. McDowell Street  
2<sup>nd</sup> Floor – Ste 2900  
Raleigh, NC 27601

Proposals are due December 13, 2022 before  
2:00pm pm local time.

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# 1 Introduction

## 1.1 Introduction

Wake County, North Carolina (“The County”) is seeking proposals from qualified consulting firms with a documented track record of successfully researching, evaluating, conducting, and preparing comprehensive studies of unsheltered or homeless service facilities for Units of General Local Government, non-profits agencies, or planning organizations. The County considers the process to be of equal importance with the final product and is searching for a consultant who can demonstrate the expertise, commitment, and capacity to undertake the holistic and expeditious development of a county-wide study.

Wake County will provide a Project Leadership Team (“Team”), composed of key Housing Affordability and Community Revitalization (“Housing”) staff and community stakeholders. The Team will provide project oversight and guidance and will serve as the primary point of contact.

A central objective of the plan will be to compile and analyze all existing unsheltered or homeless service facilities in Wake County to determine the County’s or community’s role to provide adequate shelter and services to those experiencing homelessness. This will include identifying gaps and proposing capital or operating solutions to significantly reduce unsheltered homelessness and ultimately decrease the length of time homelessness is experienced in Wake County. Staff will compile and provide existing documents and contacts for the Consultant.

It is expected that this process will begin Spring 2023 and conclude Fall 2023. The Proposer should include a timeline indicating milestone dates to meet deliverables and a delivery of a final report. 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.

## 1.2 Project Overview

### 1.2.1 County Overview

Consistently rated as one of the best places to live and work in America, Wake County is home to NC State University, Research Triangle Park, and 2006 Stanley Cup Champions, the Carolina Hurricanes. Wake County is also the center of state government, with our Capitol Building, legislature and many government offices located in Raleigh. The County consists of 12 municipalities and includes Raleigh, the County seat and State capitol.

Wake County is the third fastest growing county in the nation. More than 1 million people call Wake County home, and the County is growing more than twice as fast as the rest of the state. The County grows by approximately 62 people per day and has grown by 225,000 people over the last decade. The demographic makeup of this growth includes older people moving to this region. According to U.S. Census Bureau estimates (2010–2019), 46% of Wake County’s population growth came from people aged 55 and older.

### *Our Vision*

Wake County will be a great place to live, work, learn and play. It will be a place where people are self-sufficient, enrich their lives, respect the environment, appreciate their heritage, participate in government and plan for a better tomorrow.

### ***Our Mission***

To improve the economic, education, social well-being and physical quality of the community, we are committed to collaboration, service excellence and embracing new approaches to more effectively meet the ever-changing needs of our customers.

### **1.2.2 Housing Department Overview**

Wake County's [Department of Housing Affordability & Community Revitalization](#) is comprised of five distinct Divisions, each offering a wide range of services or supports to help Wake County residents gain access to veteran or housing benefits and maintain safe, affordable housing. These divisions consist of Equitable Housing & Community Development; Homeless & Prevention Services; Permanent Housing & Supportive Services; Research, Data & Systems; and Veterans Services.

The Department is guided by a [Comprehensive Affordable Housing Plan](#) adopted in October of 2017 and funded with a historic \$15M investment. This plan's goal is to ensure quality affordable housing for all Wake County residents. Strategic tools focus on improving land use policies, enhancing programs that create or preserve housing affordability, and increasing public resources to meet housing challenges.

The Department is also continuing work on the [House Wake! Strategic Plan](#) which coordinates federal, state and local funding to address the COVID-19 crisis and impacts to our homeless and precariously housed population. The plan implements strategies aimed to move the maximum number of individuals possible to housing stability.

Lastly, the recently incorporated Veterans Services Division focuses on assisting eligible veterans, their dependents and/or surviving spouses, children of deceased veterans, members of the Reserves or National Guard and active-duty service members in applying for benefits and services from the Department of Veterans Affairs and North Carolina Department of Military & Veterans Affairs. This division will focus on implementing recommendations from the [Veterans Services Task Force Report](#).

## **1.3 Scope of Services**

Wake County requires professional consulting services from highly skilled, experienced, and diverse firm(s) or individual(s) to create and present a viable facility study and action plan to reduce unsheltered homelessness. This plan should be in the form of a final written report and include presentation materials as well. The scope of services also includes presentations by the consultant to elected officials and/or funding partners.

### **1.3.1: Analysis of Existing and Future Conditions**

- Analyze and summarize existing data sources to determine the number of those experiencing homelessness within the geographic boundary of Wake County. Assess the number of those at risk of experiencing homelessness. Identify the characteristics, demographics, and facilities necessary for individuals and families experiencing unsheltered homelessness.
- Synthesis of unsheltered homelessness plans and other related policies for all entities (e.g. Municipal and County governments, Continuum of Care, and other community partners) that impact unsheltered homelessness in Wake County
- Map the existing emergency shelter and housing services across Wake County. Include planned expansions of facilities or services.
- Analyze the flow of individuals and families through the emergency shelter and service system to permanent housing placement. Assess barriers or bottlenecks affecting the accessibility to shelter services. If possible, develop an estimated projection of the unsheltered population in 5 to 10 years to enable long-range capacity planning.
- Identify any gaps in services compared to best practices, ineffective or outdated service models, and specifically identify barriers or challenges for those unsheltered to seek support from the

existing providers and/or when the existing continuum reaches capacity. This should include interviews or data gathering from existing providers of temporary shelter, housing, day services, street outreach services, and other services (e.g. medical, mental health, and substance treatment). Continuum of Care (CoC) agencies and leadership, advocacy groups, and most importantly, people who are or were unsheltered should be consulted.

- Obtain community input on the scope of the issue and potential solutions from all stakeholders. This would include the business community, neighborhood associations, faith communities, and other interested community members.
- Summarize key findings of the unsheltered homeless population's needs and system analysis in a written report.
- Present findings to the Wake County Affordable Housing Committee consisting of elected officials, as well as the CoC membership and staff.

### **1.3.2: Facility Study & Proposal of Strategies**

- Develop multiple options/recommendations for addressing the identified unmet needs. Recommendations must be viable and well-defined for implementation. This includes specifics on services, staffing, and facility specifications, as applicable; and may also include recommendations for programmatic shifts.
- Recommended actions should include best practices or examples implemented in other communities including the outcome for the unsheltered homeless population.
- Present options for existing building renovations, acquisition of new facilities with retrofits, or property acquisition for recommended facilities.
- Proposals to address the identified needs should include specificity on the number of individuals to be served, the services to be provided, staffing levels & required skills, and an estimate of the cost of providing those services.
- Recommendations must include budget estimates for start-up expenses, ongoing operating costs, and funding sources. The start-up expenses should include an estimate of the one-time costs of acquiring and upfitting any necessary facilities, as applicable. The recommendations should include a feasibility study for long-term funding of operational expenses including public and private grants.
- Deliver a written report of findings and recommendations, including capital costs, estimated operating expenses, and ongoing funding sources.
- Present findings to the Wake County Affordable Housing Committee consisting of elected officials, as well as the CoC membership and staff.

### **1.3.3 Desired Outcomes**

It is anticipated that the consultant's report will be used to:

- Identify facilities to address unsheltered homelessness.
- Recommend strategies for implementation and funding.
- Outline the public benefits gained from meeting the needs of the unsheltered population.
- Provide staff with a basis for the development of resources, including funding and partnerships required for next steps.

## 1.4 General Proposal 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:

**1.4.1** 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.

**1.4.2** 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.

# 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 regard to this RFP and subsequent procurement process, vendors shall make NO CONTACTS, either written or verbal, with any Wake County employee, staff member, 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  
melissa.england@wakegov.com  
919-856-6327

## 2.2 Proposal Submittal Requirements

Proposers are required to prepare their proposals in accordance with the instructions outlined in this part and elsewhere in this RFP.

One (1) copy shall be submitted to the address shown below as well as an electronic version on USB.

### **Mailing Address:**

Wake County Finance Dept - Procurement Services  
Wake County Justice Center, 2<sup>nd</sup> Floor – Ste 2900  
301 S. McDowell Street  
Raleigh, NC 27601

The County must receive proposals no later than 2:00 PM on December 13, 2022. *The Proposer'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 Proposer'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 at once request in writing an interpretation from proposal contact listed in Section 2.1. The deadline for submitting questions is November 22, 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 November 30, 2022. All written requests for clarification should be addressed to the attention of Melissa England.

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 November 30, 2022.

## 2.5 Tentative Schedule

Date	Event
Nov 14, 2022	RFP Issued Estimate
Nov 22, 2022	Questions received by 5:00 pm
Nov 30, 2022	Addendum issued
Dec 13, 2022	Proposals due by 2:00 pm
January 2023	Finalist selected
March 2023	Work begins

## 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 program's scope. All requests for further information shall be received by the County by November 22, 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 by November 30, 2022.

## 2.7 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.

## 2.8 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.

## 2.9 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 save 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 Finance Department.

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 not less than \$1,000,000 per occurrence and \$2,000,000 aggregate.

Commercial Automobile Liability, with limits not less than \$1,000,000 per accident for bodily injury and property damage applicable to any vehicle used during performance of services, including coverage for owned, hired, and non-owned vehicles. Evidence of commercial automobile coverage is only required if vehicles are used in the provision of services under this Agreement.

Professional Liability (Errors and Omissions), with limits not less than \$1,000,000 per claim and \$2,000,000 aggregate.

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 Wake County's Finance Department. If any required insurance policy expires during the term of this Agreement, Proposer must provide a certificate of insurance to the Wake County Finance Department as evidence of policy renewal prior to such policy expiration. Proposer shall be responsible for providing the Wake County Finance Department with 30-day notice of insurance policy cancellation or non-renewal during the term of this Agreement and for three years subsequent for any claims made coverage.

Response to this RFP indicates the ability to procure the coverages specified above. If Provider does not meet the insurance requirements specified above, alternate insurance coverage satisfactory to Wake County may be considered. Any request for consideration of alternate coverage must be presented within Proposer's response to this RFP.

### **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 Regulations and 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, 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.

**Electron submittals on the USB must be in PDF format and should not exceed twenty (20) pages.**

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.

#### 4.1.1 Cover Letter

(Proposal Section 1.0) The cover letter should serve as the introduction to your proposal and to your organization. Describe what makes you qualified to conduct this study and why you would like to take on this project. 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 cover letter should identify the primary engagement contact. Contact information should include a valid e-mail address and a telephone number.

#### 4.1.2 Consultant Team and Relevant Experience

(Proposal Section 2.0) 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. At a minimum, include an identification of the proposed project team, responsibilities of the project team, and a summary of the proposed services.

##### Company Background

- Length of time the company has been in business. In what state(s) has the company worked?
- A brief description of the company size and organizational structure.
- Length of time the company has been providing services to clients similar to the County.
- 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.
- Describe your contractual relationships, if any, with other organizations that will provide services described in your proposal.

##### Consultant Team Experience

- Identify your proposed team indicating who is responsible for the key roles; provide an organizational chart showing lines of communication and levels of authority.
- Include the résumés of staff who will work on the engagement. If they are working on only certain portions of the study, please indicate this on their résumé. NOTE: Staff résumés will not count toward the 20-page limit.
- 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.

#### 4.1.3 Scope of Services and Approach

(Proposal Section 3.0) This section of the response should include a general discussion of the Proposer's overall understanding of the program and the scope of work proposed as outlined in Sections 1.3.1 – 1.3.3. Describe how you plan to achieve the objectives within budget and on time. Summarize and outline your timeline including deliverables for the project.

Proposers are encouraged to provide examples of services provided and the impact of those services. Describe any past projects that are relevant to the scope of this RFP. Demonstrate your track record of success.

#### 4.1.4 Client References

(Proposal Section 4.0) The County considers references to be important in its decision to award a contract. Failure to provide this information will result in the proposal being considered non-responsive.

Please provide a comprehensive client listing with year(s) in which your firm provided services. Also provide at least three current clients who we may contact. References should be clients similar in size to the County. Please give their company name and mailing address, telephone, and email of the contact person. Also include the type of engagement that was performed.

	Reference #1	Reference #2	Reference #3
COMPANY			
Contact Name			
Contact Title			
Contact Phone			
Mailing Address			
Email			
Type of Engagement			

#### 4.1.5 Cost Proposal

(Proposal Section 5.0) Proposers should submit an estimate of costs.

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 asks Proposers to estimate costs for all categories with the understanding that they may have to make assumptions. Such assumptions should be stated. Items that should be included in this cost section include:

- Cost of Services. Please state your fees for the key areas outlined in the Scope of Services. Include any estimations for costs associated with firm travel, meals, and supplies.
- Provide your procedures for billing and fee collection. How do you reconcile the fee to the services received? Specify whether this is on a monthly, quarterly or as performed basis.
- Provide a listing of hourly rates by consultant team members which could be used as a basis for additional services.

## **5 Evaluation Criteria**

### **5.1 Selection Participants**

The County has established a team of staff 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**

Responses will be evaluated based on the following criteria:

1. Compliance to the RFP requirements; quality, clarity and completeness of services proposed in relation the scope of work the response.
2. Demonstrated experience with similar work and references
3. Qualifications and relevant experience of key personnel/management team
4. Project approach
5. Cost effectiveness and value of proposal
6. Other criteria deemed appropriate by the County Project Team