



Request for Qualifications (RFQ) for
Strategic Planning and Facilitation

Issue Date: Thursday, August 11, 2022

Deadline for Questions: Thursday, August 25, 2022 by 3:00 PM

Response Date/Time: Thursday, September 8, 2022 by 3:00 PM

Response Location: esanderson@crcog.org

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1 INTRODUCTION AND INTENT

CRCOG seeks proposals from qualified and experienced facilitators to provide Strategic Planning and Facilitation Services.

CRCOG seeks to update its Strategic Vision and identify a set of Strategic Priorities for the next three to five years. The chosen provider will support this effort by facilitating meetings with internal and external stakeholders and by assisting in the development of an overall strategic “playbook” or similar document for CRCOG. Part of the facilitation will include updating CRCOG’s overall mission statement and related documents.

It is CRCOG’s intent to award a contract for a one-year term, with options for additional two one-year extensions.

2 BACKGROUND AND OVERVIEW

The Capitol Region Council of Governments (CRCOG) is a voluntary Council of Governments formed to initiate and implement regional programs of benefit to the towns and the region. It is guided by the chief elected officials of our 38 Metro Hartford municipalities. The mayors, first selectmen and women, and town council chairs who make up our governing Policy Board recognize that the future of our individual members is tied to the future of our region. Our members have collaborated for more than 50 years on a wide range of projects to benefit our towns individually and the region as a whole. CRCOG serves the Capitol Region and all our municipalities by:

- Helping members improve governmental efficiency and save tax dollars through shared services and other direct service initiatives;
- Promoting efficient transportation systems, responsible land use and preservation of land and natural resources and effective economic development;
- Strengthening the Capitol City of Hartford as the core of a strong region, and as our economic, social and cultural center;
- Advocating for the region and its towns with the State and Federal governments;
- Strengthening our regional community by helping coordinate regional agencies and programs; and
- Assisting local governments and citizens in articulating, advocating and implementing the vision, needs and values of their regional community.

3 SCOPE OF SERVICES

A. Strategy Planning and Facilitation

1. Facilitate strategic planning sessions and visioning exercises with CRCOG staff and other stakeholders to update CRCOG’s strategic vision and to establish a set of strategic priorities for the next three to five years. This may include establishing rules and guidelines for the strategic planning sessions, preparing work plan documents, group facilitation and performing other duties in relation to the strategic planning sessions from pre-planning through follow-up as required.
2. Define issues and components of the strategic priorities as they relate to CRCOG’s goals, and objectives.
3. Fully engage CRCOG staff, members, and other stakeholders in the process.

B. Expected Work Products

1. Documents Related to Strategic Planning Sessions and Facilitation

Exercises: Generate documents in preparation of and in response to the strategic planning sessions and visioning exercises. Effectively engage participants with the goal to update and refine CRCOG’s vision and strategic priorities and identify the primary action steps necessary to realize the stated vision and set of strategic initiatives. Also through group facilitation, update and refine CRCOG’s mission statement and identify its organizational values.

2. Strategic “Playbook:” Develop a strategic playbook or similar document based on CRCOG’s mission, vision, strategic priorities, and organizational values to serve as a priority setting document for the CRCOG Policy Board and staff. The Strategic Playbook should be a dynamic document that is flexible to meet changing conditions and resonates with board and committee members, staff, and other stakeholders. Strategic Playbook components may include (but not be limited to):

- Organizational vision and mission
- Set of organizational values
- Specific strategic priorities and initiatives
- Goals, objectives and primary steps that support the various strategic initiatives
- Metrics to measure achieving those goals and objectives
- Initial Implementation Plan

4 PREPARING A RESPONSE

By submitting a response, respondents represent that they have thoroughly examined and become familiar with the scope of services outlined in this RFQ and are capable of performing the work to achieve the objectives.

Respondents are asked to submit all responses via e-mail only to the Response Location indicated on the coversheet. Respondents must submit electronic versions of all documents.

Responses must be submitted no later than the time and date outlined on the coversheet. Responses should be submitted as outlined on the coversheet.

A. Project Understanding / Approach

Describe your understanding of the scope of services required and your firm's ability to provide the full spectrum of needs outlined in the Scope of Service. Describe your approach to providing the desired services and highlight any relevant special services your firm provides that could be beneficial, particularly those that may not be offered by other firms.

B. Relevant Experience and Qualifications

Please describe in detail your firm’s relevant experience in fulfilling the needs outlined in the Scope of Services.

- What makes your firm uniquely qualified to provide the services described in this RFQ?

RFQ: Strategic Planning and Facilitation

- Include specific examples of how your firm has successfully customized similar solutions to serve the unique needs of similar public agencies
- Include 3 references (preferably public entities)

C. Fee Proposal.

Include your fee proposal and a breakdown of the fee, including time, rates, and/or materials.

CRCOG reserves the right to negotiate fees and project scope with the successful respondent if it is deemed to be in the agency's best interest

5 QUESTIONS

Questions shall be submitted via e-mail to esanderson@crcog.org by **the time and date on the coversheet**. No oral interpretations shall be provided. Responses shall be posted on the CRCOG website and e-mailed to respondents who submitted questions. It is the respondent's responsibility to check the website for addenda prior to submission of any proposal.

Prospective contractors shall not attempt to communicate with, in writing, electronically or orally, any CRCOG official or employee other than the method listed in this section, above. Prospective contractors shall not contact any other CRCOG officials in an attempt to gather information regarding this RFQ, or in an attempt to influence CRCOG's consideration of its proposal. All inappropriate communications with CRCOG employees or officials will be forwarded to the proposal evaluation team. Inappropriate communications by a prospective contractor may, at the discretion of the evaluation team, constitute grounds for disqualification of that prospective contractor's proposal. Alternatively, the evaluation team may, at its discretion, consider such inappropriate communications when evaluating and scoring proposals.

6 FREEDOM OF INFORMATION ACT AND ACCOMMODATIONS

Proposals submitted in response to the RFQ will be publicly available once a contract is executed or negotiations for the award of such contract have ended pursuant to Connecticut General Statutes Section 1-210(b)(24). All documents that the proposer believes to be confidential trade secrets and/or commercial or financial information and except under the above statutes should be clearly marked as such to preserve the Freedom of Information Act exemption for confidential trade secrets pursuant to Connecticut General Statutes (5)(A) and (5)(B).

CRCOG may provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified prospective contractors with a disability. Prospective contractors requiring accommodation shall submit requests in writing, with supporting documentation justifying the accommodation, to CRCOG at the following address:

CRCOG
Re: Accommodation for RFQ Strategic Planning and Facilitation
241 Main Street, 4th Floor
Hartford, CT 06106

Requests for accommodation must be received by the Deadline for Questions as listed on the cover page. CRCOG reserves the right to grant or reject any request for accommodation.

7 RFQ GENERAL TERMS AND CONDITIONS

A. Acceptance or Rejection by the Capitol Region Council of Governments

The CRCOG reserves the right to accept and or reject any or all proposals submitted for consideration or to negotiate separately in any manner necessary to serve the best interests of the CRCOG and its members. Respondents whose proposals are not accepted shall be notified in writing.

B. Ownership of Proposals

All proposals submitted in response to this RFQ are to be the sole property of CRCOG and shall be subject to the provisions of Section 1-210 of the Connecticut General Statutes (re: Freedom of Information).

C. Changes to Proposals

No additions or changes to the original proposal will be allowed after submittal.

D. Contract Requirements

A formal contractual arrangement will be entered into with the consultant, selected as per the CRCOG standard form of agreement. The contents of the proposal submitted by the successful respondent and the RFQ will become part of any Contract award.

E. Amending or Canceling Request

CRCOG reserves the right to amend or cancel this RFQ, prior to the due date and time, if it is deemed to be in its best interest to do so.

F. Waiver of Informalities

The Capitol Region Council of Governments reserves the right to accept or reject any and all responses to this Request for Qualifications, or any part thereof, and to waive any informalities and/or technicalities that are deemed to be in its best interest.

G. Collusion

By responding, the firm implicitly states: that his/her proposal has not been made in connection with any other competing firm submitting a separate response to this RFQ; is in all respects fair; and has been submitted without collusion or fraud. It is further implied that the firm did not participate in the RFQ development process, had no knowledge of the specific contents of the RFQ before its issuance, and that no employee of CRCOG either directly or indirectly assisted in the vendor's proposal preparation.

H. Assigning/ Transferring of Agreement

Any successful firm is prohibited from assigning, transferring, conveying, subletting or otherwise disposing of the resulting agreement or its rights, title, or interest therein or its power to execute such an agreement to any other person, company or corporation without prior consent and approval in writing from CRCOG.

I. Termination

CRCOG may terminate any contract(s) or any part of any contracts resulting from this process at any time for: cause, default or negligence on the part of the vendor, or if the vendor fails, in the opinion of the Agency, to meet the general terms and conditions of any resulting contract or to provide a level of service that is deemed to be in the best interest of the Agency.

J. Severability

If any terms or provisions of this Request for Qualifications shall be found to be illegal or unenforceable, then such term or provision shall be deemed stricken and the remaining portions of this document shall remain in full force and effect.

K. Insurance Requirements

The Respondent shall, at its own expense and cost, obtain and keep in force during the entire transition and contract period the following insurance coverages covering the Respondent and all its agents, employees and sub-contractors and other providers of services, and shall name the Capitol Region Council of Governments and its employees and agents as an Additional Insured on a primary and non-contributory basis to the Respondent's Commercial General Liability and Automobile Liability policies. These requirements shall be clearly stated in the remarks section on the Respondent's Certificate of Insurance. In addition:

1. All policy forms shall be on the occurrence form.
2. Acceptable evidence of coverage will be on the ACORD form or a form with the same format.
3. All renewal certificates shall be furnished at least 10 days prior to policy expiration.
4. Each certificate shall contain a 30-day notice of cancellation.
5. Insurance shall be issued by an insurance company licensed to conduct business in the State of Connecticut which has at least an "A-" policy holders rating according to Best Publications latest edition Key Rating Guide.

Required insurance coverage:

1. **Professional Liability Insurance** with limits up to \$2,000,000 aggregate limit issued on claims made basis for the term of the contract and continuing for two years following the completion of the contract at the Vendor's cost.
2. **Comprehensive General Liability Insurance:** Vendor shall, at its own cost and expense, obtain and keep in force during the Term of the Agreement general liability insurance with minimum limits of 1 million per occurrence/ 2 million aggregate and shall name the CRCOG and their respective officers, officials, employees, agents, boards, and commissions as Additional Insureds on a primary and non-contributory basis. There shall be no special limitations on the scope of

protection afforded to the CRCOG. Vendor shall assume any and all deductibles in the described insurance policies and Vendor's insurer shall have no right of recovery or subrogation against CRCOG. These requirements shall be clearly stated in the remarks section on Vendor's Certificate of Insurance. Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best's Rating of A- and all deductibles, if any, are the sole responsibility of Vendor.

3. **Automobile Liability Insurance** including non-owned and hired vehicles in the same limits as indicated above.
4. **Workers' Compensation Insurance** at the Connecticut statutory limit including Employers' Liability with limits of \$100,000 each accident, \$500,000 for each disease/policy limit, and \$100,000 for disease for each employee.
5. **Excess Liability Umbrella Form** over sections B, C, and D- Employers' Liability with limits up to \$4,000,000.

L. Hold Harmless and Indemnification

In addition to its obligation to provide insurance as specified above, the Vendor, its subcontractors, agents and assigns shall indemnify and hold harmless the Capitol Region Council of Governments and its member municipalities, including but not limited to, its elected officials, and its officers, from any and all claims made against the CRCOG, including but not limited to, damages, awards, costs and reasonable attorney's fees, to the extent any such claim directly and proximately results from the negligent acts, errors, or omissions in performance of services by the Vendor during the Vendor's performance of this Agreement or any other Agreements of the Vendor entered into by reason thereof. CRCOG agrees to give the Vendor prompt notice of any such claim and absent a conflict of interest, an opportunity to control the defense thereof.