

## REQUEST FOR PROPOSAL

Original Date Issued: Thursday, July 12, 2018, 10:00am EST

Deadline for Questions: Thursday, July 19, 2018, 4:00pm EST

Closing Date: Friday, August 10, 2018, 5:00pm EST

Anticipated Award Date: Monday, September 17, 2018, 10:00am EST

Reference: ICMA Values Statement 2018

Subject: **Request for Proposal No. ICMAHO/Values Statement/2018**

The International City/County Management Association (ICMA) is seeking proposals from eligible Respondents for professional services for ICMA in Washington, D.C. ICMA anticipates awarding one (1) single award as a result of this solicitation. ICMA reserves the right to award more or fewer awards than anticipated above.

Technical questions concerning this solicitation should be directed to Angela Perry, Assistant Director, HR at [aperry@icma.org](mailto:aperry@icma.org). All contractual questions relating to this solicitation must be submitted to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org).

All communications must include the solicitation title, Request for Proposal No. ICMAHO/Values Statement/2018, in the subject line.

No communication intended to influence this procurement is permitted except by contacting the designated contacts above. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the Respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

This solicitation in no way obligates ICMA to award a contract nor does it commit ICMA to pay any cost incurred in the preparation and submission of a proposal.

ICMA bears no responsibility for data errors resulting from transmission or conversion processes.

ICMA appreciates your responsiveness and looks forward to a mutually beneficial business relationship.

Sincerely,

Angela Perry, Assistant Director, HR

## **PURPOSE**

ICMA seeks a qualified independent contractor for assistance in the creation and implementation of an organizational values statement that will strengthen our culture and improve organizational performance in our quest to be “best in class” as an association-based organization. Our intention is to create a values statement that is embraced and embodied by all staff every day. We want to ensure that our values statement aligns with the culture of our organization and embodies the spirit in which we interact with colleagues and members, conduct business, and achieve our strategic goals. We are looking for a custom-designed approach that is informed through discussions between the service provider and our staff—an organic process that involves listening to staff and learning more about how, through our association’s core beliefs, we can become the organization we aspire to be.

## **ABOUT ICMA**

Founded in 1914, ICMA, the International City/County Management Association, advances professional local government through leadership, management, innovation, and ethics. Our vision is to be the leading professional association dedicated to creating and supporting thriving communities throughout the world. ICMA members are the professional city, town, and county managers who are appointed by elected officials to oversee the day-to-day operation of our communities. The association promotes and embraces diversity among its members, including a governing board that reflects ICMA’s membership and the communities served.

ICMA provides member support, data and information, peer- and results-oriented technical assistance, and training and professional development to more than 12,000 ICMA-member city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns, to large metropolitan areas.

ICMA is a 501(c)(3) nonprofit organization that offers a wide range of services to its members and the local government community. It also performs mission-driven grant and contract-funded work both in the U.S. and internationally, which is supported by federal government agencies, foundations, and corporations.

For more information regarding ICMA’s programs and services, visit our website, [icma.org](http://icma.org).

ICMA’s Dun and Bradstreet number is 072631831.

## **BACKGROUND**

Marc Ott, ICMA Executive Director, has a vision to transform ICMA into a “best in class” association. He convened a meeting with the ICMA leadership team and a subset of middle managers several months ago to discuss positive and negative behaviors that exist within the organization. It was noted that the negative behaviors do not align with the ICMA values and they are a hindrance to achieving the goal of being best in class. As a result of the discussion, a subset of middle managers was tasked with leading an initiative to create a new set of values or values statement. The team determined that the best approach was to bring in an external service provider and expert in the field to facilitate this process so that all staff can participate

throughout the process; ensure that a new succinct values statement will be created to serve as the guiding principle in defining and advancing the workplace culture; and spur ICMA's mission and vision toward becoming best in class.

### **SCOPE OF WORK**

To meet this objective of becoming "best in class", ICMA requires technical assistance in facilitating, gathering, and analyzing all employee input in the formulation of a new values statement. The contractor will utilize his/her knowledge and expertise to facilitate multiple sessions using a variety of techniques (i.e., interviews, focus groups, surveys, etc.) that will assist in identifying actionable values that align with our mission. These techniques should provide safe spaces for employees to speak freely and allow for anonymity if requested. The contractor will also assist in implementation efforts, identifying avenues for successful socialization and integration of the new values statement.

Specific tasks include:

- Lead in the creation of a values statement/mantra that is aligned with the culture and spirit of our organization.
- Provide expertise or insights to complement existing staff resources.
- Facilitate in-person interviews, focus groups, surveys, etc., with all staff.
- Collect and analyze data contributed by all employees.
- Develop and support a plan for successful implementation and socialization of new values statement within ICMA.

### **SUBMISSION REQUIREMENTS**

Section 1: Company profile:	Please limit to no more than 15 pages. CV's or resumes will not count toward the page limit of 15. <ol style="list-style-type: none"> <li>1. Provide a description of your business.</li> <li>2. Provide the year established in the current business for the services requested in this request for proposal.</li> <li>3. Include information on company size and number of employees.</li> <li>4. Include CV's or resumes of key personnel. In a leading paragraph, include availability of proposed project teams' availability for duration of the project.</li> </ol>
Section 2: References:	A description of the types and sizes of client organizations served, as well as a sample client list indicating the type of services rendered. Respondents should provide references as follows: <ol style="list-style-type: none"> <li>1. At least three (3) examples of relevant work.</li> <li>2. The contact information should include the contact name, phone number, e-mail address, and website address. References will be contacted as part of the evaluation process.</li> </ol>
Section 3: Approach:	<ol style="list-style-type: none"> <li>1. Describe your firm's subject matter expertise on a project of this type.</li> <li>2. Describe the specific approach recommended by the consultant to accomplish stated goal of project.</li> <li>3. Explain the recommended approach. What are the possible benefits/downsides of this approach?</li> </ol>

	4. Describe what alternatives might be considered. 5. Describe the process you suggest for communicating with employees prior, during, and after implementation of new values statement. 6. Describe how your firm will retain confidentiality and anonymity if requested.
Section Pricing:	4. ICMA will consider a proposal that is either a transaction level, fixed-fee, level of effort rate subject to a maximum not to exceed fee or other arrangement fair and favorable to ICMA.  If proposing a transaction fee arrangement, provide your proposed transaction fee for each of the transaction types anticipated under this scope of work.  For other than transaction fee arrangement, describe your pricing method and why this would be advantageous to ICMA.  Please be advised that ICMA is cost-conscious about procuring outside services.

#### **TYPE OF CONTRACT TO BE AWARDED**

TBD

#### **CONTRACT TERM AND DELIVERY DATES**

ICMA expects this scope of work to be completed within 3 to 6 months. Final delivery dates will be negotiated upon award.

#### **EVALUATION AND AWARD PROCESS**

Offers will be evaluated based upon:

1. Ability to match the qualifications set forth in this solicitation
  - a. section 1 (20%)
  - b. section 2 (20%)
  - c. section 3 (35%).
2. Price (25%).

ICMA reserves the right to award under this solicitation without further negotiations. The Respondents are encouraged to offer their best terms and prices with the original submission.

#### **INSTRUCTIONS TO THE RESPONDENTS**

Respondents interested in providing the services described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP.

Adherence to the proposal format by all Respondents will ensure a fair evaluation with regard to the needs of ICMA. Respondents who do not follow the prescribed format may be deemed non-responsive. A letter transmitting the proposal must be signed by an officer of the firm authorized to bind the Respondent as required by this solicitation.

Submission should include:

1. Transmission letter.
2. Package of no more than 15 pages, excluding CV's or resumes and required forms.
3. Completed and signed required forms.

Packages must be submitted electronically to Representative, Grants and Contracts Administration at [workwithus@icma.org](mailto:workwithus@icma.org) with a subject line noting the RFP title and number found on page one of this solicitation. No phone calls please.

Applications received after the closing date stated on the top of page 1 will be rejected.

#### **APPENDICES (REQUIRED FORMS)**

W-9

New Vendor Form

#### **GENERAL CONDITIONS**

Proposal Submission - Late proposals and proposals lacking the appropriate completed forms will be returned. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA location other than the email address above. If changes are made to this solicitation, notifications will be sent to the primary contact provided to ICMA from each Respondent. ICMA takes no responsibility for effective delivery of the electronic document. The vendor offer will be rejected if the vendor modifies or alters the electronic solicitation documents.

Contract Award - ICMA anticipates making one award under this solicitation. It may award a contract based on initial applications without discussion or following limited discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA may request additional data or material to support applications. ICMA expects to notify Respondents in approximately one month from the proposal due date whether or not their proposal has been selected to receive an award.

Limitation - This solicitation does not commit ICMA to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA reserves the right to accept or reject any or all proposals received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in ICMA's best interest.

Disclosure Requirement - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or members of any similarly governing body. If an indictment or conviction should come to the

attention of ICMA after the award of a contract, ICMA may exercise its stop-work right pending further investigation or terminate the agreement.

**No Gifts** - It is ICMA's policy that no gifts of any kind and of any value be exchanged between Respondents and ICMA personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any of ICMA's procurements and may result in disciplinary actions against ICMA personnel involved in such discovered transactions.

**Equal Opportunity** - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

**Small and Disadvantaged Businesses** - ICMA shall use good faith efforts to provide contracting and procurement opportunities for SBD's. SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran-owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Under-utilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.