

CITY OF BEAUFORT, SC

REQUEST FOR PROPOSAL
RFP NO. 2023-106



CITY OF BEAUFORT
CITY COUNCIL RETREAT FACILITATION SERVICES
DUE: JANUARY 27, 2023 by 2:00 PM

**REQUEST FOR PROPOSAL
CITY COUNCIL RETREAT FACILITATION SERVICES
RFP NO. 2023-106**

Part I

GENERAL INFORMATION

SEALED PROPOSALS will be received in the Finance Department, 2nd Floor, City Hall, 1911 Boundary Street, Beaufort, South Carolina until **2:00 P.M. ET Friday, January 27, 2023**. All qualified vendors are invited to submit proposals to the City of Beaufort for the following:

SUBMIT: One (1) portable document format (pdf) format file as an email attachment on or **before 2:00 P.M. Friday, January 27, 2023**. Depending upon file size limitations, a file sharing platform (i.e. Dropbox) may need to be used. After sending bids by email, bidders must send a separate email without an attachment to advise that a submission has been made. The Procurement Administrator will reply to verify receipt and advise accordingly if a Dropbox submission is necessary. Electronic submission should complete well in advance of the deadline to ensure confirmation of receipt. The City of Beaufort nor its agents are responsible for late submissions. See **DEADLINE ENFORCED** below.

OR:

TO SUBMIT HARD COPIES: deliver One (1) unbound original and three (3) bound copies of all requested documentation on or before **2:00 P.M. ET Friday, January 27, 2023**.

ADDRESS TO: City of Beaufort, City Hall, 2nd Floor Finance Department, Attention: Kay McIntyre

MAILING ADDRESS: 1911 Boundary St., Beaufort, South Carolina 29902

OFFICE ADDRESS: 1911 Boundary St., Beaufort, South Carolina 29902

EMAIL ADDRESS: kmcintyre@cityofbeaufort.org **PHONE NUMBER:** 843-525-7079

MARK OUTSIDE ENVELOPE: "RFP NO. 2023-106 – City Council Retreat Facilitation Services - ATTN: KAY MCINTYRE"

ALL POTENTIAL OFFERORS ARE REQUIRED TO ATTEND. LOCAL, SMALL, AND MINORITY-OWNED BUSINESSES ARE STRONGLY ENCOURAGED TO PARTICIPATE IN THIS SOLICITATION.

DEADLINE ENFORCED

PROPOSALS DELIVERED AFTER THE TIME AND DATE SET FOR RECEIPT OF PROPOSALS SHALL NOT BE ACCEPTED AND WILL BE RETURNED UNOPENED TO THE OFFEROR. IT IS THE OFFEROR'S RESPONSIBILITY TO ENSURE TIMELY DELIVERY OF THEIR PROPOSAL. WEATHER, FLIGHT DELAYS, CARRIER ERRORS AND OTHER ACTS OF OTHERWISE EXCUSABLE NEGLIGENCE ARE RISKS ALLOCATED TO OFFERORS AND WILL NOT BE EXEMPTED FROM DEADLINE REQUIREMENTS.

Any offer submitted as a result of this RFP shall be binding on the offeror for **NINETY (90)** calendar days following the specified opening date. Any proposal for which the offeror specifies a shorter acceptance

period may be rejected.

Public Bid Opening

Bid Opening: A Public Bid Opening will be held via Zoom at 2:01 P.M. ET on January 27, 2023.

Link to Zoom: <https://us05web.zoom.us/j/88973347136?pwd=ZlNpem8yeCtkdm8rY2E4VmJXNUZzd09>

Proprietary and/or Confidential Information

Your proposal or bid is a public document under the South Carolina Freedom of Information Act (FOIA), except as to information that may be treated as confidential as an exception to disclosure under the FOIA.

All information that is to be treated as confidential and/or proprietary must be **CLEARLY** identified, and each page containing confidential and/or proprietary information, in whole or in part, must be stamped and/or denoted as **CONFIDENTIAL**, in bold, in a font of at least 12 point type, in the upper right hand corner of the page. *All information not so denoted and identified shall be subject to disclosure by the City.*

This Request for Proposal is being issued by the City of Beaufort. Direct all questions or request for clarification of this RFP by email, mail, or fax contact information listed above.

Offerors are specifically directed not to contact any other City personnel for meetings, conferences, or technical discussions related to this request unless otherwise stated in this RFP. Failure to adhere to this policy may be grounds for rejection of your proposal.

Offerors ARE CAUTIONED that any statement made by City staff persons that materially change any portion of this RFP shall not be relied upon unless they are subsequently ratified by a formal written amendment to this RFP. Any revisions to this RFP will be issued and distributed as an addendum. All addenda, additional communications, responses to questions, etc. pertaining to the Request for Proposal may be accessed on the City of Beaufort website under Quick Links – “Bid Opportunities” at www.cityofbeaufort.org.

All Offerors should consult this website for updates before submitting bids.

THE DEADLINE FOR QUESTIONS IS: 5:00 P.M., JANUARY 20, 2023. ANSWERS TO SUBMITTED QUESTIONS WILL BE POSTED ON THE CITY WEBSITE BY 5:00 PM ON JANUARY 24, 2023.

If the Offeror discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, Offeror shall immediately notify the City of such error in writing and request modification or clarification of the document. The Offeror is responsible for clarifying any ambiguity, conflict, discrepancy; omission or other error in the RFP or it shall be deemed waived.

The City of Beaufort reserves the right to reject any or all proposals, or any parts thereof, waive informalities, negotiate terms and conditions, and to select an Offeror that best meets the needs of the City of Beaufort and its employees.

Compliance with the South Carolina Illegal Immigration Reform Act

Any Company entering into a service contract with the City of Beaufort must certify to the City of Beaufort that the Company intends to verify any new employees' status, and require any sub-consultants performing services under the service contract to verify their new employees' status, per the terms of the South Carolina Illegal Immigration Reform Act, and as set out in Title 41, Chapter 8 of the Code of Laws of South Carolina, 1976.

POLICY CONCERNING MINORITY AND WOMAN OWNED BUSINESS ENTERPRISES

Intent

Business vendors owned and operated by women and minority persons, in general, have been historically restricted from full participation in the nation's free enterprise system to a degree disproportionate to other businesses.

The City believes it is in the community's best interest to assist minority and woman owned businesses to develop fully, in furtherance of City's policies and programs which are designed to promote balanced economic and community growth.

The City, therefore, wishes to ensure that minority and woman owned businesses (M/WBEs) are afforded the opportunity to fully participate in the City's overall procurement process and will not be discriminated against on the grounds of race, color, sex, or national origin in consideration for an award.

Goal for Participation

The City adopts the State of South Carolina's goal for participation of M/WBEs: ten percent (10%) of annual controllable procurement expenditures which are defined as agreements between the City and a Company to provide or procure labor, materials, equipment, supplies and services to, for or on behalf of the City. However, a specific expectation has not been set for this RFP.

Required Forms

Vendors submitting proposals are required to include completed forms that are found in the General Terms and Conditions Section on City Website <https://www.cityofbeaufort.org/166/General-Terms-Conditions>.

City of Beaufort reserves the right to reject any or all bids; to waive any informality or irregularity not affected by law; to evaluate, in its absolute discretion, the bids submitted; to award the contract according to the bid which best serves the interests of the City; or to not award the contract if the City determines that it is not in its best interest to do so.

Proposals that are not signed will not be accepted as complete and shall not be considered. Proposals must be signed (not typed) in the appropriate space(s) by an authorized officer or employee of the offeror.

The words "Bidder", "Offeror", "Proposer", "Vendor", "Operator", and "Company" are used interchangeably throughout this RFP, and are used in place of the person, vendor, or corporation submitting a bid.

Part II

REQUIREMENTS AND TERMS

I. INTRODUCTION

The City of Beaufort is requesting proposals from firms to provide meeting facilitation services which will support the City Council strategic planning retreat to be held March 7 and 8, 2023.

The City Council will be holding an off-site, two-day, strategic planning retreat. During this retreat, councilmembers will synthesize their individual ideas with staff recommendations to arrive upon a framework for Council action in the next two (2) year period. This will act as the basis for development of the upcoming budget. The firm will be responsible for both organizing and facilitating the retreat to maximize the productivity of this meeting. The facilitator must be capable of coordinating multiple discussions of complicated topics between councilmembers and staff over the course of two days.

II. SCOPE OF WORK

The selected facilitator will be responsible for working with city staff and the mayor to develop a detailed agenda for the 2023 City Council Retreat. They must plan and facilitate meetings among staff and elected officials in order to deliver a positive experience that results in a clear strategic planning direction for the City.

The City requires the following:

- a) **Agenda Planning** – The selected meeting facilitator must work with the City Manager and Mayor to design a detailed agenda which includes a thorough review of the current strategic plan. The facilitator may be required to conference through remote meetings.
- b) **Pre-Meeting Research** –The firm must gather input from councilmembers and senior staff through individual meetings or written surveys regarding current City priorities, initiatives, and key issues. This information must reference the current strategic plan. The data gathered will be synthesized and reported back during the retreat to help inform the facilitation process.
- c) **Meeting Facilitation** – The firm must facilitate the retreat between/among staff and the City Council to create a pleasant, dynamic, and productive environment. Using methods to streamline the synthesis of multiple viewpoints into a coherent strategic plan is encouraged.
- d) **Meeting Summary** - In consultation with staff, the firm must produce a written document that summarizes any meeting deliberations, including an overview document that lists priorities in summary format.
- e) **Facility** – The City Clerk will take care of set-up, food, and supplies. The 2023 City Council Retreat will be held at The Landing Pad at 500 Carteret Street in Beaufort, SC. Both the public and media are invited to attend. Generally, about 10 various community organizations attend the retreat as well.

PART III

Submission Requirements

I. RESPONSE TO THIS REQUEST FOR PROPOSAL MUST INCLUDE THE FOLLOWING:

- a) The proposal must include the items specifically enumerated in Part V, Section III(2)(b). In addition to the information required as described below, a Respondent may submit supplemental information that it feels may be useful in evaluating its proposal. This information may include documents such as a Respondent's profile or brochure.

II. Proposal Development

- a) **Required content of proposal:** The detailed requirements set forth in the Proposal Format are recommended. Failure by any Proposer to respond to a specific requirement may result in disqualification. The City reserves the right to accept or reject any or all proposals. Proposers are reminded that proposals will be considered exactly as submitted. Points of clarification will be solicited from proposers at the discretion of the City. Those proposals determined not to be in compliance with provisions of this RFP and the applicable law and/or regulations will be considered non-responsive and disqualified.

All costs incurred by the Proposer associated with RFP preparations and subsequent interviews and/or negotiations, which may or may not lead to execution of a contract, shall be the responsibility entirely and exclusively by the Proposer.

- b) **Proposal format:** The proposal format requirements were developed to aid Proposers in their proposal development. They also provide a structured format so reviewers can systematically evaluate several proposals. These directions apply to all proposals submitted.

The purpose of the Proposal is to demonstrate the technical capabilities, professional proposals, past experiences, and knowledge within this industry. Proposer's proposal must address all the points outlined herein as required, in the following order.

In order to be considered for selection, respondent proposers shall submit a proposal that addresses each of the following criteria, and shall also provide resumes and evidence of qualifications to provide the services listed in this RFP.

i) **Transmittal Letter**

A transmittal letter must be submitted with a Proposer's proposal which shall include:

- (1) The RFP subject and RFP number in which Proposer is submitting.
- (2) Name of the Proposer responding, including mailing address, e-mail address, telephone number, and names of contact person.
- (3) The name of the person or persons authorized to make representations on behalf of the Proposer, binding the vendor to a contract.
- (4) Prepare an executive summary stating the Proposer's understanding of the project including an affirmative statement that the Proposer will provide the necessary resources to manage and provide the highest level of service to the City, its residents, patrons, and visitors. The proposer must also provide an opinion why their firm should be chosen. Include any general information the proposer wishes the City to consider about the proposal.

ii) **Proposer's Work History and References**

- (1) Provide references from three clients for whom the facilitator has recently (within last two years) conducted meeting facilitation services. Information on this list shall include the following for each location:
 - a. Project location
 - b. Name and contact information for a reference with knowledge of the Respondent's work at the specified location
 - c. Dates services were provided
 - d. Summary of Scope of Services provided
 - e. Explain the reasons, if any, that your company's agreements for providing facilitation services were cancelled or terminated early.

iii) **Approach to Scope of Work**

- 1) Describe your firm's approach to retreat facilitation.
- 2) Discuss your approach for meeting facilitation, goal setting, as well as team building in order to provide the highest level of service to the City, its residents, patrons and visitors.
- 3) Detail your firm's organization and how its resources can be put to work for the City to provide the services specified in the Scope of Work provided herein.

iv) **Pricing**

- (1) Provide your firm's proposed price for the Scope of Services referenced. All prices must be on a project basis. Time and materials/hourly rate proposals will not be accepted.

c. Other Information to Provide

- (i) Other information and materials which the proposer wishes to submit in support of his proposal, qualifications, etc.
- (ii) List any lawsuits or arbitration proceedings that have been initiated by or against your company in the past five years. Briefly describe the nature of the action and the outcome.

d. Required Forms:

- (i) Proposals must include the required forms.
 1. Certificates of Insurance showing present coverage as described in the “Insurance” sections of General Terms and Conditions.
 2. Part V – Exhibit “A” Scope of Work
 3. Ethics in Public Contracting Certification
 4. Non-Collusion Affidavit
 5. Small / Woman-Owned / Minority Business Enterprise Form
 6. Non-Resident Taxpayer Affidavit (S.S. Department of Revenue I-312)
 7. RFP Signature page (must be signed in ink)

PART IV

Award Criteria

It is the City's intent to contract with one Proposer to provide City Council retreat facilitation services as detailed herein. Award of any proposal may be made without discussion with Proposers after responses are received. The Proposers submitting sealed proposals will be evaluated by an evaluation committee. After careful evaluation, the committee will rank the Proposers and make a recommendation to the City Manager of the lowest responsible bidder. The City reserves the right to accept or reject any and all bids that is in the best interest of the City. The scoring of the proposals by the City's RFP Evaluation Committee shall be based on the respondent's qualifications including, but not limited to the following:

1) **Professional Qualifications and Experience (maximum 25 points)**

Proposals will be evaluated for the firm's pertinent qualifications and experience.

2) **Proposed Methodology and Scope of Work compliance (maximum 20 points)**

Proposals will be evaluated based on the stated approach to the work, the detailed organization of tasks, schedules to implement the approach, and demonstrated understanding of the requirements of the City of Beaufort.

3) **Cost effectiveness and reasonableness of Offeror's proposed pricing of Services (20 points)**

Proposals will be evaluated on the lump-sum amount proposed.

4) **Quality and Satisfaction of reference responses (20 points)**

Reference responses for selected proposers will be evaluated and considered as evidence of past performance.

5) **Quality of the sample work provided. (15 points)**

Sample work will be evaluated and considered as a demonstration of performance expectation.

The City will evaluate proposals based on the factors outlined within this RFP, which shall be applied to all eligible, responsive proposals in selecting the lowest responsible bidder. The City reserves the right to disqualify any proposal for, but not limited to; person or persons it deems as non-responsive and/or non-responsible. The City reserves the right to make such investigations of the qualifications of the Proposer as it deems appropriate.

Lowest responsible bidder. Contracts shall be awarded to the lowest responsible bidder. In determining “lowest responsible bidder”, in addition to price, the City shall consider:

- (a) The ability, capacity and skill of the bidder to perform the contract or provide the service required;
- (b) Whether the bidder can perform the contract or provide the service promptly, or within the time specified, without delay or interference;
- (c) The character, integrity, reputation, judgment, experience and efficiency of the bidder;
- (d) The quality of performance of previous contracts or services;
- (e) The previous and existing compliance by the bidder with laws and ordinances relating to the contract or services;
- (f) The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service;
- (g) The quality, availability and adaptability of the supplies or contractual services to the particular use required;
- (h) The ability of the bidder to provide future maintenance and service for the use of the subject: of the contract;
- (i) The number and scope of conditions attached to the bid.

The City may choose to interview one or more Vendors responding to this RFP. The City reserves the right to request and obtain, from one or more Vendors, supplementary information as may be necessary for the City to analyze the proposal pursuant to the evaluation criteria. The City reserves the right to accept or reject any and all proposals that is in the best interest of the City.

PART V

Additional Documents

RFP NO. _____

EXHIBIT A

NARRATIVE ON THE APPROACH TO THE SCOPE OF WORK

(Proposals should respond to the Scope of Work point by point by numeric reference.)

CITY OF BEAUFORT
SOUTH CAROLINA
RFP SIGNATURE PAGE
RFP NO. 2023-106

PROPOSER'S NAME: _____

The undersigned, having become familiar with the existing conditions and the Proposal Scope of Services hereby proposed, agrees to complete the work as described in accordance with the Request for Proposal and Contract Documents.

Proposer warrants that no gratuities, in the form of gifts, entertainment, or otherwise, were offered or given by the **Proposer**, to any officer or employee of the City with a view toward securing the contract or securing favorable treatment with respect to any determination concerning the performance of the contract.

This offer is genuine and not made in interest of or on behalf of any undisclosed person, vendor or corporation and is not submitted in conformity with any agreement or rules of any group, association, organization or corporation; **Proposer** has not directly induced or solicited any other **Proposer** to submit false or sham bid; **Proposer** has not solicited or sought by collusion to obtain for itself any advantage over any other **Proposer** or other **Owner**.

The words "Bidder", "Offeror", "Proposer", "Vendor", and "Company" are used interchangeably throughout this solicitation, and are used in place of the person, vendor, or corporation submitting a solicitation.

Proposer has examined copies of all documents and of the following addenda (if applicable):

Addendum No.	Date
_____	_____
_____	_____
_____	_____

Address: Post Office Box: _____ Zip: _____
Street: _____ Zip: _____
City: _____ State: _____
Telephone: _____ Fax: _____
Email: _____

*Signature: _____ Title: _____

Proposal will not be accepted unless signed in ink (not typed) in the appropriate space by an authorized officer or employee of the bidder.

Printed Name: _____ Date: _____

ETHICS IN PUBLIC CONTRACTING AFFIDAVIT

STATE OF _____)

COUNTY OF _____)

_____, being first duly sworn, deposes and says that:

1. He/She is _____(title) for/of _____ (company/business), the Proposer that has submitted the attached Statement of Proposals;
2. He/She is legally qualified and capable of signing this affidavit and is authorized to do so by Proposer;
3. He/She is fully informed regarding the preparation and contents of the attached Statement of Proposal and of all pertinent circumstances respecting such Proposal;
4. Such Proposal is genuine and is made without fraud;
5. Neither the said Proposer, nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest has offered or received any kickbacks or inducements from any offeror, suppliers, manufacturer, or company in connection with the offer, and they have not conferred on any public employee, public member, or public official having official responsibility for this procurement or transaction, any payment, loan, subscription, advance, deposit of money, services, or anything of value as defined in Section 8-13-100 of the South Carolina Code of Laws; and
6. Furthermore, neither the Proposer, nor any of its officers, partners, owners, agents, representatives, employees or parties in interest has any relationship with the City, another person, or organization that interferes with fair competition or that constitutes a conflict of interest with respect to a contract with the City.

DATE

COMPANY/BUSINESS

BY: _____
SIGNATURE

PRINTED NAME

SWORN to before me this _____
day of _____, 20 _____

ITS: _____
TITLE

Notary Public for _____(state)

My commission expires: _____

By: _____
(signature)

NONCOLLUSION AFFIDAVIT OF PRIME PROPOSER

STATE OF _____)

COUNTY OF _____)

_____, being first duly sworn, deposes and says that:

1. He/She is _____ of _____, the Proposer that has submitted the attached proposal;
2. He/She is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
3. Such Proposal is genuine and is not a collusive or sham proposal;
4. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, has in any way colluded, conspired, connived, or agreed, directly or indirectly with any other Proposer, company or person to submit a collusive or sham Proposal in connection with the Contract for which the attached Proposal has been submitted or to refrain from proposing in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other proposer, company or person to fix the price or prices in the attached Proposal or of any other proposer, or to secure through any other proposal, or to fix any overhead, profit or cost element of the bid price or the bid price of any other proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the City of Beaufort, SC or any person interested in the proposed contract.

(signed)

(title)

SWORN to before me this _____
day of _____, 20____

Notary Public for _____(state)
My commission expires: _____
By: _____
(signature)

SMALL/WOMAN-OWNED/MINORITY BUSINESS ENTERPRISE FORM	
YOUR COMPANY'S CURRENT STATUS	SUPPLIER BUSINESS CLASSIFICATIONS
<p>Is this a small business?</p> <p>Yes No</p>	<p>A small business is a business which is independently owned and operated, not dominant in its field of operation, and can qualify under criteria concerning number of employees, average annual receipts, or other criteria as outlined by the Small Business Administration. (See CFR Title 13, Part 121, as amended)</p>
<p>Is this a woman-owned business?</p> <p>Yes No</p>	<p>A woman-owned business is a business which is at least 51% owned by a woman or women who also control and operate the business.</p>
<p>Is this a minority-owned business?</p> <p>Yes No</p> <p>If Yes, please indicate minority group: <input type="checkbox"/> Asian American <input type="checkbox"/> Black American <input type="checkbox"/> Hispanic American <input type="checkbox"/> Native American</p>	<p>A minority-owned business is a business which is at least 51% owned, controlled and operated by socially and economically disadvantaged individuals. The following groups are among those presumed to be socially and economically disadvantaged: Asian Americans, Black Americans, Hispanic Americans, and Native Americans.</p>
<p>Is this a disabled-owned business?</p> <p>Yes No</p>	<p>A disabled-owned business is a business which is at least 51% owned, controlled and operated by an individual or individuals who are disabled.</p>
<p>Is this a veteran-owned business?</p> <p>Yes No</p>	<p>A veteran-owned business a business which is at least 51% owned, controlled and operated by an individual or individuals who are U.S. veterans.</p>
<p>Is this a disabled veteran-owned business?</p> <p>Yes No</p>	<p>A disabled veteran-owned business is a business which is at least 51% owned, controlled and operated by an individual or individuals who are U.S. veterans and disabled.</p>
<p>Are the individuals who own, control and operate this business U.S. citizens?</p>	<p>Yes No</p>
<p>Is this business a non-profit organization?</p>	<p>Yes No</p>
<p>Is this business incorporated?</p>	<p>Yes No</p>