



Town of Bluffton Request for Proposals RFP # 2019-21 Grant Administration Services

1. PURPOSE

The Town of Bluffton, South Carolina (Town) is seeking proposals from interested and qualified consultants or firms with past, proven, positive experiences in providing **grant administration services** under a fixed price contract. The target start date for performing these services is January 2019.

The Town intends to award one contract to the consultant that presents the proposal considered to be of the best value to the Town for a period of one (1) year with the option to renew for two (2) additional 1 year periods.

At any time during the solicitation process, the Town of Bluffton reserves the right to refuse any and all sealed proposals and to waive any technicalities and formalities. The Town of Bluffton reserves the right to negotiate with all qualified Proposers. The Town may cancel this solicitation in part or in its entirety at any time during the solicitation process if it is in the Town's best interest to do so.

2. SOLICITATION TERMS and CONDITIONS

Proposers Responsibility:

While the Town has used considerable efforts to ensure an accurate representation of information in this RFP, each prospective Proposer is urged to conduct its own investigations into the material facts and the Town shall not be held liable or accountable for any error or omission in any part of this RFP.

Before submitting a proposal, each Proposer shall make all investigations and examinations necessary to ascertain site conditions and requirements affecting the full performance of a contract and to verify any representations made by the Town upon which the Proposer will rely. If the Proposer receives an award because of its submission, failure to have made such investigations and examinations will in no way relieve the Proposer from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the Proposer for additional compensation or relief.

A Proposer, by submitting a proposal represents that the Proposer has read and understands the Request for Proposals requirements and its response is made in accordance therewith and that the Proposer is familiar with the local conditions under which the awarded Proposer must perform.

It is incumbent upon each prospective Proposer to carefully examine these requirements, terms, and conditions. Any inquiries, suggestions, or requests concerning interpretation, clarification or additional information shall be made in writing in accordance with procedures set forth herein. The Town will not be responsible for any oral representation given by any employee, representative or others. The issuance of a written addendum is the only official method by which interpretation, clarification or additional information can be given.

Questions and Inquiries:

Questions must be submitted no later than 5:00 pm Eastern, December 3, 2018

Replies considered necessary or critical to the solicitation will be issued through an addendum within the Bid Opportunities section of the Town's website at www.townofbluffton.sc.gov. It is the Proposer's responsibility to check the website periodically to determine if an addendum has been issued. Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect and may not be relied upon by potential consultants in submitting their qualifications statement. Receipt of all addenda shall be acknowledged by the consultant signing and enclosing said addendum acknowledgement with their proposal.

Questions and inquiries regarding this solicitation shall be submitted to:

Felicia Roth
Purchasing & Contract Administrator
Town of Bluffton
froth@townofbluffton.com

Restricted Discussions:

All prospective Proposers are hereby instructed not to contact any member of the Town of Bluffton Council, the Town Manager or Town of Bluffton staff members, other than the noted contact person OR the Town's Purchasing Administrator regarding this RFP or their response at any time during the RFP process. Any such contact shall be cause for rejection of your submittal

Submittal of Proposals:

Sealed proposals shall be received by or prior to:

2:00 pm on Wednesday, December 12, 2018

The closing date and time shall be scrupulously observed. Packages containing submittals shall be presented as such that they may be easily identified. The outside of the package shall be identified as follows:

RFP # 2019-21
Grant Administration Services
Town of Bluffton
Attn: Felicia Roth, Finance Department

Packages containing submittals and being delivered by postal, freight carrier, courier or in person shall be sent to:

**Town of Bluffton
20 Bridge Street
Bluffton, South Carolina 29910**

Public Opening of Proposals:

Due to the renovation of Town Hall and the inability to provide proper accommodations for all participants and attendees of the public opening, the public opening will be held immediately following the deadline and at the address, on the date and time specified below:

2:15 pm on Wednesday, December 12, 2018

**Rotary Community Center / Oscar Frazier Park
11 Recreation Court
Bluffton, South Carolina 29910**

No packages will be accepted at the Public Opening location. Packages must be submitted to the Town Hall location prior to the deadline to be considered. Packages mailed or hand delivered to the Rotary Community Center will be rejected.

The names of the consultants submitting qualifications packages will be read aloud and recorded. No other information will be provided to the public until after a final contract has been awarded.

Late Submittals:

Under no circumstances shall qualifications statements be delivered after the time specified; such submittals will be returned unopened to the submitting consultant. The Town will not be responsible for late deliveries or delayed mail. It is the consultant's sole responsibility to assure that his/her submittal is complete and delivered at the proper time and place prior to the deadline. Submittals which for any reason are not delivered will not be considered. Offers by facsimile, telegram or telephone are not acceptable.

Acceptance / Rejection:

The Town reserves the right to accept or reject any or all proposals. The Town also reserves the right to waive any irregularities, informalities, or technicalities and may at its discretion, request a new solicitation.

Receipt of a proposal does not indicate that the Town of Bluffton has pre-determined a company's qualifications to receive an award or contract. Such determination will be made after the opening and will be based on the Town's evaluation of the proposals compared to the specific requirements and qualifications of a consultant as contained and described in this document.

Proprietary and/or Confidential Information:

A proposal 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. A consultant that cannot agree to this standard should not submit a proposal.

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 may be subject to disclosure by the Town.

Award:

Award will be made to the Proposer who submits the overall proposal that is judged to provide the most advantageous and best value to the Town. In determining the most advantageous proposal, the Town reserves the right to consider criteria, such as, but not limited to, cost, quality, workmanship, past experience, ability, capability, reputation, and past performance. The Town may opt to establish alternate selection criteria to protect its best interest or meet performance or operational standards.

3. QUALIFICATIONS

At a minimum, and to be considered a responsible proposer, the consultant must:

- A.** Actively involved in the business of performing grant writing and administration for the last five (5) years;
- B.** Have five (5) years of documented past, proven and positive experiences writing and administering Federal and/or State of South Carolina grants as a grantee or subgrantee;
- C.** Provide at least three (3) references of clients for whom the consultant has provided similar services within the last two (2) years;
- D.** Demonstrate the ability to provide the requested services;
- E.** Local presence or availability required.

4. SCOPE OF SERVICES

This Scope of Services defines the minimal acceptable performance by the proposer in providing the defined services at all the identified locations and related areas identified below. The successful offeror will demonstrate in its proposal the ability to perform these services for the Town of Bluffton. Offerors are encouraged to propose alternate approaches and/or enhancements to the process as part of the methodology and approach of the submittal package. The target date for commencing these services is **January 2019**.

Term of Contract:

This contract shall be effective for **one (1) year** following the date of execution.

Option to Renew:

Prior to, or upon completion of the initial term of this contract, the Town shall have the option to renew the contract for two (2) additional one (1) year periods. Continuation of the contract beyond the initial period, and any option subsequently exercised, is a Town prerogative, and not a right of the vendor. This prerogative will be exercised only when such continuation is clearly in the best interest of the Town.

Scope of Work:

The grant administrator will locate, successfully apply, and appropriate State of South Carolina and/or Federal grants for various types of work within the Town of Bluffton. It is assumed that the grant administrator would average approximately 10 hours of work each week.

In the last three years, the Town of Bluffton has secured an average of \$1.3M of grant money annually from State or Federal sources. In Fiscal Year 2019, the budgeted amount is \$2.7M. A major objective of securing a knowledgeable consultant is to increase grant awards by a discernable factor.

The administrator will process the paperwork and applications, work with departmental subject matter experts, and ensure that the money is being used according to the terms and conditions and well as Federal, State and local laws and regulations.

Duties and Responsibilities

- Research available Federal and State of South Carolina grants in diverse areas including but not limited to stormwater and sewer, affordable housing, transportation, community planning, capital infrastructure, pedestrian access, parks and recreation, arts and culture, tourism, historic preservation, information technology, law enforcement technology or other equipment.
- Ability to discern legal requirements and communicate those to the project manager.
- Ensure that all applications of grant process are supported by proper documentation in order to make the grant process work effectively and efficiently.
- Ensure that the grant applications are in accordance with the qualification criteria.
- Disseminate timely information on funding opportunities to grantees and coordinate the proposal planning process.
- Monitor progress of the funded project and advise whether the money is being utilized in accordance with grant requirements.
- Support annual or bi-annual financial audits on funded projects.
- Maintain and verify payment records, review invoices, and record receipts.
- Provide the Town and the Grantors with deliverables in an organized, orderly fashion.
- Prepare monthly progress reports on the funded project status and submit them to the program manager.
- Perform other duties as assigned.

Skills and Proficiencies

- Knowledge of State of South Carolina and Federal grant processes and practices
- Knowledge of financial and budgeting aspects of the organization
- Must be a skilled administrative professional to carry out varied grant mandated job responsibilities
- Must have client facing experience with strong verbal and written communication skills
- Ability to maintain a cordial relation with different departments of the Town to ensure proper coordination with Grantors
- Must have good interpersonal and negotiation skills
- Must be well organized and have detail oriented approach
- Proficient in the use of MS Office (Word, Excel, Access),
- Ability and willingness to learn new systems, techniques and procedures
- Ability to provide grant administration training to departments

Insurance:

The awarded vendor shall provide and maintain at all times during the term of the contract, without cost or expense to the Town, policies of insurance, with a company or companies authorized to do business in the State of South Carolina, and which are acceptable to the Town, insuring the vendor against any and all claims, demands or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the vendor under the terms and provisions of the contract. The vendor is responsible for a timely provision of certificate(s) of insurance to the Town at the certificate holder address evidencing conformance with the contract requirements at all times throughout the term of the contract.

An original certificate of insurance, indicating that the awarded vendor has coverage in accordance with the requirements of this section, shall be furnished by the vendor to the Town within five (5) working days of such request and must be received and accepted by the Town prior to contract execution and/or before any work begins.

Such policies of insurance, and certificates of insurance, shall insure the vendor is in accordance with the following minimum limits:

Workers Compensation – The Selected Vendor shall agree to maintain Worker’s Compensation Insurance & Employers Liability in accordance with the State of South Carolina Code.

Business Auto Policy – The Selected Vendor shall agree to maintain Business Automobile Liability at a limit of liability not less than \$500,000 each occurrence for all owned, non-owned and hired automobiles.

Commercial General Liability – Commercial General Liability for public liability during the lifetime of a contract shall have minimum limits of \$1,000,000 per claim, \$2,000,000 per occurrence for Personal Injury, Bodily Injury, and Property Damage Liability. Coverage shall include Premises and/or Operations, Independent Contractors, Products and/or Complete Operations, Contractual Liability and Broad Form Property Damage Endorsements. Coverage shall not contain an exclusion or limitation endorsement for Contractual Liability or Cross Liability. Coverage for the hazards of explosion, collapse and underground property damage (XCU) must also be included when applicable to the work to be performed. All insurance policies shall be issued from a company or companies duly licensed by the State of South Carolina. Specific endorsements will be requested depending upon the type and scope of work to be performed.

Professional Liability – The Selected Vendor shall agree to maintain Professional Liability or equivalent Errors & Omissions Liability at a limit of liability not less than \$1,000,000 Per Occurrence. When a self-insured retention (SIR) or deductible exceeds \$10,000, the Town reserves the right, but not the obligation, to review and request a copy of Vendors most recent annual report or audited financial statement.

Additional Insured Requirements – Except as to Workers’ Compensation and Employers’ Liability, said Certificate(s) shall clearly state that coverage required by the contract has been endorsed as follows:

Town of Bluffton, a municipality of the State of South Carolina, its officers, employees and agents

The Certificate of Insurance shall unequivocally provide thirty (30) days written notice to the Town prior to any adverse changes, cancellation, or non-renewal of coverage thereunder. Said liability insurance must be acceptable by and approved by the Town as to form and types of coverage.

Delivery and Completion of Work:

The Town will use the Proposer’s estimate to develop a period of performance for work to be completed. This period of performance may be adjusted at the Town’s discretion. All work shall be performed in accordance with

good commercial practice. The work schedule and completion dates shall be adhered to by the Proposer(s), except in such cases where the completion date will be delayed due to acts of God, strikes, or other causes beyond the control of the vendor. In these cases, the Proposer shall notify the Town of the delays in advance of the original completion date so that a revised delivery schedule can be appropriately considered by the Town.

Acceptance of Services:

The services rendered as a result of an award from this solicitation shall not be deemed complete, until accepted by the Town and shall be in compliance with the terms herein, fully in accord with the specifications and of the highest quality. In the event that the service does not conform to the specifications, the Town reserves the right to terminate the contract and will not be responsible to pay for any such service.

5. SUBMITTALS and FORMAT

By submitting a proposal, the consultant certifies that it has full knowledge of the scope, nature, and quality of work to be performed. Submittals should be prepared simply and economically, providing a straightforward, concise description of the respondent's ability to fulfill the requirements of the scope of work and a solution that is viable and within the Town's best interests.

The Town reserves the right to award a contract pursuant to this RFP without further discussion with proposers. Therefore, it is important that each submittal is complete, adheres to the format and instructions contained herein, and is submitted in the most favorable manner possible. Failure to provide the requested information will render your proposal as non-responsive.

The submittal package shall consist of three (3), one (1) signed original and two (2) complete copies of the Respondents proposal. The submittal package along with the appropriate number of copies shall be sealed and delivered no later than date and time listed above.

The contents of the proposal shall include the following:

A. Signatory Sheet

Completed, signed and certified qualifications statement.

B. Letter of Transmittal

Limit to one (1) or two (2) printed pages.

- Briefly state the consultants understanding of the work to be done and the commitment to perform the work.
- Give the names of the persons who will be authorized to make representations for the consultant, their titles, and contact information.
- The letter must be signed by an authorized representative of the company who has the authority to commit the company to their proposal as submitted.

C. Consultant's Experience and Capabilities

- Detail grant writing experience for State of South Carolina and/or Federal grants
- Indicate the number of client applications submitted in calendar year 2016, calendar year 2017, calendar year 2018, and the success rate of each.
- Indicate your cumulative five year grant funding success in dollars
- Describe software/systems used to find, prepare, and submit grant applications

D. Consultant's Profile

- Attach resume of key personnel

E. Consultant's Experience and Performance (Past and Current)

- Provide details of grant administration duties for State of South Carolina and/or Federal grants over the last five (5) years. Detail by grant the following:
 - Grantor, client, period of performance, and scope of work.
 - Specific details regarding consultant's responsibility in researching the grant, applying for the grant, and managing conformance to terms and conditions.
 - Provide experience in meeting timelines and schedules with clearly established and proven methods for maintaining the budget.
 - Detail ability to work in a team environment during project administration
 - Timeliness of reporting
 - From work completed within the last two years, provide contact information for at least three (3) references. Information to include: Name, title, phone number and email address; please also provide some context about the grant award, e.g, the Grantor, the scope of services, the name of the project, the year of the award, and any additional relevant details.

F. Pricing Schedule

Consultants shall provide the fees to be charged should the Town award a contract. Describe whether services are firm, fixed price, assuming an average labor expenditure of 10 hours a week, or hourly by job title.

G. Certifications

Consideration will be given to any vendor who is certified as local in accordance with the Town of Bluffton Local Vendor Certification program or any vendor who can provide either a certification or evidence from System from Award Management of their Disadvantaged Business Enterprise status.

6. EVALUATION, SELECTION, NEGOTIATION and AWARD

State of South Carolina procurement code will be followed to secure the awarded consultant. The contact listed within this solicitation, in coordination with the Purchasing Administrator, will be the coordinator for the selection

process and the sole point of contact for all respondents. In addition to the materials provided in the written responses to this RFP, the Town may utilize site visits or may request additional material, information, interviews, presentations or references from the respondent(s) submitting a proposal or offer.

A. Evaluation Criteria:

Proposals will be evaluated on the basis of the following criteria:

- a. Demonstrated knowledge of Federal and State of South Carolina grant sources and budget allowances**
- b. Demonstrated proficiency in obtaining funds**
- c. Prior years’ experience in grant writing and administration**
- d. Past performance references**
- e. Cost**
- f. Locally certified vendor and/or Disadvantaged Business Enterprise certification**

A points system will be given to each criteria listed through the identified weighting system:

EVALUATION CRITERIA	MAX POINTS
Demonstrated knowledge of Federal and State of South Carolina grant sources and budget allowances	19
Demonstrated proficiency in obtaining funds	19
Prior years’ experience in grant writing and administration	19
Past performance references	19
Cost	19
Certification - Local vendor and/or DBE	5
TOTAL POSSIBLE POINTS	100

B. Evaluation Method

All responsive submittals will be reviewed and evaluated by a Review and Selection Team. This three (3) to five (5) member committee approach will require selected staff to evaluate the submittals through the following processes:

- Individually provide a detailed review and thorough evaluation of each submittal;
- Individually score each submittal utilizing the scoring method given;
- Combining the scores of each individual team member to form an overall team score;
- Eventual participation in a team discussion, including in-depth evaluations and group interaction after individual review and scores are achieved.

The Town reserves the right to request additional information and/or clarification of any information submitted by any respondent at any time during the evaluation process. This includes, but is not limited to information that indicates financial resources as well as the ability to provide and maintain the services as requested. The Town reserves the right to make investigations of the qualifications of the respondent as it deems appropriate, including but not limited to background investigations.

Consultants exhibiting the ability to provide and maintain the services requested; submits a proposal that is formatted correctly; and is inclusive of all the required forms will be considered a responsive and responsible proposer.

C. Selection Method:

In general, the Town of Bluffton wishes to avoid the expense (to the Town and to presenting consultants) of unnecessary presentations. Therefore, the Town will make every reasonable effort to achieve the ranking using written submittals alone.

If no single top ranked consultant can be clearly identified by review of the written submittals alone, then the Review and Selection Team shall request the Purchasing Administrator to schedule the top ranked consultants for presentations / interviews.

The Town may choose to conduct oral interviews with, or receive oral presentations from, one or more of the Proposers. If the Town chooses to allow oral interviews and/or presentations, such interviews or oral presentations will be open to the public. The Town will not be liable for any costs incurred by a Proposer in connection with such interviews/presentations (i.e., travel, accommodations, etc.)

The Selection and Review team will rank all complete submittals received and/or formal oral presentations/interviews in order of preference and outcomes will be based on the determination of which consultant will meet the needs and provide the best overall value to the Town as it pertains to the requirements of the scope of work.

D. Negotiations:

The Town reserves the right to negotiate a final agreement with the top ranked proposal that meets the needs and is considered the best value to the Town of Bluffton. If a contract cannot be negotiated with the highest ranking consultant, negotiations may be conducted with the second, and then the third, and so on until a satisfactory contract can be agreed upon and executed. Additionally, should the Town choose to do so, it reserves the right to provide all responsive and responsible Proposers an opportunity to submit their best and final offers.

E. Award and Contract

Award will be made in accordance with the Town of Bluffton's purchasing policy and procedures. A contract resulting from an award shall be the Town of Bluffton's purchase order and/or contract, containing the Town's terms and conditions. A sample of the contract has been attached to this solicitation for viewing. Contracts from consultants submitting a proposal will not be accepted.

Attachments

1. Sample Town of Bluffton Agreement