



**REQUEST FOR PROPOSALS  
RFP 2019-0006**

**Facilitation and Strategic Plan Services for  
Town of Hilton Head Island Town Council**

**February 2019**

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## **I. GENERAL INFORMATION AND SUBMITTAL INSTRUCTIONS**

The Town of Hilton Head Island (“Town”) is soliciting sealed proposals from qualified firms or individuals (“Offeror” or “Contractor”) to facilitate a strategic planning process and assist in the development of comprehensive organizational strategic plan for Town Council.

Please submit six (6) original paper copies and one (1) electronic copy (on a flash or thumb drive) of your sealed proposal by 2:00 PM Eastern Time on March 7, 2019 (“Due Date”). Proposals received after this time and date shall be rejected and will not be considered for contract award, without exception. A copy of this RFP can be obtained at <http://www.hiltonheadislandsc.gov/government/procurement/>.

A public opening of proposals will be held at 2:05 PM Eastern Time on March 7, 2019 at 70 Shelter Cove Lane, Unit H, Hilton Head Island, SC 29928, where only respondent names shall be read. No other information will be shared at the opening.

Sealed proposals should be hand carried or delivered by traceable means (i.e. FedEx or other similar courier) to Procurement Officer, Town of Hilton Head, 70 Shelter Cove Lane, Unit H, Hilton Head Island, SC 29928. All proposals must be clearly marked on the outside with the following: RFP# 2019-0006: Facilitation and Strategic Plan Services. If an Offeror intends to hand deliver their proposal on the day of the proposal opening, please be aware that Offeror accepts sole and complete risk if their proposal cannot be delivered on time due to unforeseen circumstances such as travel delays or weather. No emailed or faxed bids will be accepted.

**Questions:** All questions regarding this solicitation must be submitted in writing to Richard Groth, Procurement Officer, at [richg@hiltonheadislandsc.gov](mailto:richg@hiltonheadislandsc.gov) and will be responded to in writing as well. All inquiries received and responses to them will be posted in one or more addendums to this solicitation on the Town’s website. **It is the Offeror’s responsibility to check the Town website after the deadline for questions and prior to the due date for proposals to ensure addendums have not been issued for this solicitation.** The deadline for submitting questions is 2:00 PM Eastern Time on February 22, 2019 (Question Deadline). An Addendum to this RFP listing any Offeror questions and corresponding Town response shall be issued no later than 4:30 PM Eastern Time on February 25, 2019.

The Town reserves the right to accept or reject any or all proposals received as a result of this request for proposals or to negotiate with all qualified Offerors, or to cancel in part or in its entirety this solicitation if it is in the best interests of the Town. The Town reserves the right to refuse any and all proposals and to waive any technicalities and formalities.

This solicitation does not commit the Town to award a contract or to procure any goods or services. The Town shall not incur or pay for any costs associated with the

preparation of Offeror proposals.

All proposals must be signed by an official of Offeror authorized to bind Offeror. By submitting a proposal, Offeror agrees that its proposal shall be good and held open for a period of at least ninety (90) days from the Due Date.

The Town does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in employment or in the provision of goods and services. The Town encourages disadvantaged businesses (defined as small, women-owned and/or minority-owned businesses) to respond to this solicitation. Certified disadvantaged businesses should include a copy of their applicable certification for such designation with their proposal.

## **II. BACKGROUND**

The Town of Hilton Head Island has a Council-Manager form of Government. In this form of government, Town Council is composed elected officials consisting of a Mayor and six (6) Council Members. Except as otherwise provided by law, all powers of the Town to include all legislative powers and the determination of all matters of policy are vested in the Council. The Mayor presides over Council meetings.

The Council hires the Town Manager to serve as the chief executive officer and head of the administrative branch of the Town. The Manager is responsible to the Council for the proper administration of all affairs of the Town, having general supervision, management, control of all departments and responsibility for approximately 250 full time employees.

Town's Mission Statement:

- To provide excellent customer service to all that come in contact with the Town.
- To wisely manage and utilize the financial and physical resources of Town government.
- To promote policies and programs which will assure the long term health and vitality of the community.
- To encourage and instill job satisfaction for all Town staff.
- To develop and enhance the professional growth of all Staff members.

The Town's 2018-2019 fiscal year budget is \$74.3 million.

Hilton Head Island, is a resort town located on an island of the same name in Beaufort County, South Carolina. The island features 12 miles of beachfront on the Atlantic Ocean and is a popular vacation destination with an estimated 2.6 million visitors annually contributing approximately \$1 billion to the local economy. As of July 2017, the estimated year-round population was approximately 40,000. Hilton Head Island is a primary city within the Hilton Head Island-Bluffton-Beaufort metropolitan area.

### **III. SCOPE OF SERVICES**

The Town intends that the successful proposer, once engaged, will prepare and facilitate the next Council Strategic Planning Workshop which is scheduled for early December 2019. The anticipated timeline would be a Wednesday through Saturday event, with the actual sessions taking place on Thursday and Friday. To carry out this scope of work, the Town expects that the successful proposer will work in close consultation with the Town's selected staff in collaboration with the Town Council, if applicable; the services to be furnished pursuant to this Request for Proposals ("RFP") may include, but are not limited to the following as needed:

1. Develop a strategic planning process in collaboration with a team comprised of the Town Council and selected Town staff members for the new 2020-2025 Strategic Plan.
2. Review the most recent strategic plan reports conducted by Town in order to identify/prioritize the appropriate short/long term goals and to assist Town Council to develop strategies that effectively positions the organization for success.
3. Identify, and make detailed recommendations to develop and deploy Town Council resources (staff, funding, management systems, organizational structure, partnerships, etc.) to achieve the identified goals and strategies.
4. Facilitation of an estimated 2 to 3 day on-site Town Council and staff retreat process.
5. Offeror/Contractor shall act at all times in an attentive, ethical, and responsible manner so as to represent the Town with the utmost concern for its interests, goals and image with Town Council members, staff, and members of the general public.
6. Once selected for the contract award, prepare and conduct background interviews with Town Council members and selected Town staff.
7. Prepare all documents for all Strategic Planning Workshops to include, but not limited to, organizing materials, agendas, meeting minutes, and reports. This must include the preparation of the new 2020-2025 Strategic Plan along with a current performance report covering the Town's current status on meeting goals and objectives.

### **IV. MINIMUM QUALIFICATIONS**

1. Prior Experience: Demonstrated prior and recent experience in providing similar facilitation and strategic planning consulting services. The firm and

staff must have credentials relevant to the requested services and must be in the facilitation and strategic planning consulting business for a minimum of five (5) years. References and examples of similar work completed are required (see Section V.3.d). Experience with local government entities having similar issues is desired.

2. Capacity: Demonstrated capability to perform the potential volume and type of services described in Section III, Scope of Services.

## **V. PROPOSAL REQUIREMENTS AND FORMATTING**

Proposals shall include a concise statement of the Offeror's approach to the project and a summary of the Offeror's ability to provide the required services.

Proposals should, at a minimum, include:

1. Letter of interest, including the firm's history, size, and the name of the principal and/or key personnel who will be assigned to work directly with the Town Council and staff on this project. It is expected that the same key personnel be assigned to this contract for the duration of the contract. Provide the location of the office which will be primarily responsible for providing these services.
2. Detailed qualifications and previous experiences, especially for local government entities. Provide specific detail on experience and results with working with other organizations and local governments. Provide a resume for each individual who will be assigned to provide these services and designate the individual who would have primary responsibility for overseeing these services.
3. Description of the recommended approach, methodology, deliverables, client meetings, reports and plan for performing services outlined in the Scope of Work in Section III, including:
  - a. Description of how the Proposer will specifically identify goals and objectives and prepare the new strategic plan for the Town;
  - b. Description of proposed firms implementation plan including but not limited to the screening, interviewing, and assessment processes. This should include the information of any sub-consultants being used to include their background, resumes and contact information;
  - c. Proposed timeline with specific milestones from the date of contract award;
  - d. List of at least three (3) client references, including name of community/organization, name of contact person with phone number and email address for which the firm has provided similar

- services during the past five (5) years;
- e. Sample strategic plan materials; include completed strategic plans from other organizations that your firm completed;
  - f. Proposed techniques to identify goals and objectives;
4. Provide a proposed work plan and itemized budget. At a minimum, the work plan shall provide itemization of all costs and services and a billing schedule for each phase of the contract. If the proposal includes any expenses to be billed separately from professional fees, provide a detailed estimate of such expenses. At a minimum, your fees should provide the following:
- a. If based on an hourly rate, provide the hourly rates to be charged for each individual who would be assigned to this engagement, the anticipated total hours and a general description of how billable hours will be allocated among key personnel.
  - b. Provide an explanation if fees will be calculated on any other basis.
  - c. Itemize the type of expenses (other than fees) for which your firm would seek reimbursement.
  - d. Provide a maximum not to exceed amount for these services.
5. Completed of the Checklist of Proposal Submittal Requirements (Attachment 1).

## **VI. EVALUATION CRITERIA AND CONTRACT AWARD**

If a contract is awarded as a result of this solicitation, such award shall be made to the responsive and responsible Offeror with the highest rated proposal based on the stated evaluation criteria below. Contract award, as well as continuation of the contract in subsequent fiscal periods, is subject to availability of Town funds. In the event that contract negotiations with the highest rated Offeror are unsuccessful, the Town reserves the right to begin contract negotiations with next highest rated Offeror.

### **Evaluation Criteria**

1. **Experience of Offeror/Key Personnel (20%):**  
Experience of firm and key personnel in conducting successful facilitation and strategic planning services with municipalities and other government or non-profit organizations.
2. **Overall Project Approach/Work Plan (30%):**  
Strength of proposed work plan for providing the required services, and demonstrated ability (with examples) of successful strategic planning. Quality of samples of completed work from past experiences, reports, and strategic plans.

3. **Cost/Fees (30%)**
4. **Implementation Plan/Timeline/Schedule (10%):**  
Clearly delineated timeline with specific milestones identified.
5. **References (10%):**  
Satisfaction level of client references with the Offeror's services.

After initial scoring of the above criteria, the Town reserves the right to select a short list of finalists for a presentation/interview. Results of the interview process shall factor into the final scoring for contract award.

**VII. STANDARD CONTRACT TERMS AND CONDITIONS**

Offeror acknowledges it has read and understands the terms and conditions provided in the Town's standard contract clauses attached hereto as **Attachment 2**, and Offeror also agrees that such clauses shall substantially form the basis or be incorporated into the resulting contract between Offeror and Town. Offeror also acknowledges that terms and conditions provided in this RFP and Offeror's proposal, either in their entirety, or relevant portions thereof, may be included and become part of any resulting contract.

The anticipated initial term of the resulting contract shall be dependent upon the proposed timeline for Contractor to complete the contracted services.

# ATTACHMENT 1

## Facilitation and Strategic Plan Services RFP 2019-0006

### Checklist of Proposal Submittal Requirements

The following checklist is intended to advise the Offeror of all items or information that must be submitted with their proposal.

1. Signed Acknowledgement appearing on this form below.
2. Proposal responding to all the requirements and providing all requested information as set forth in Sections III, IV and V of this RFP.
3. Completed Affidavit acknowledging the requirements of the South Carolina Illegal Immigration Reform Act, Attachment 3.

#### Offeror Acknowledgement:

I have read the above checklist of proposal requirements as well as this solicitation in its entirety, and understand that failure to submit any item, document, form or information identified as being required may result in the rejection of our proposal and eliminate our company from consideration for contract award.

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

## ATTACHMENT 2

STATE OF SOUTH CAROLINA                    )  
  )  
COUNTY OF BEAUFORT                        )           **AGREEMENT**

**THIS AGREEMENT** (“Agreement”) is made this <<Date>> between <<Company Name>> (hereinafter called “Contractor”) and the Town of Hilton Head Island (hereinafter called "Town"), a municipal corporation organized and existing under the laws of the State of South Carolina.

**WHEREAS**, the Town has a requirement to <<list service or supply>>;

**WHEREAS**, the Town and the Contractor desire to enter into an Agreement wherein the Contractor shall provide such services as set forth herein below.

**NOW, THEREFORE**, for and in consideration of the mutual promises, undertakings and covenants set forth herein, the receipt and sufficiency of which is acknowledged and affirmed by the Town and the Contractor, the parties hereto agree as follows:

1. The Contractor shall <<list task or services to be provided>>.
2. The total cost of this Agreement shall not exceed <<List total cost>>.
3. The term of this Agreement shall be for a period of \_\_\_\_\_ (#) years, commencing on the date of execution and expiring on <<date>>.
4. The Town Manager may terminate this Agreement in whole or in part at any time for the convenience of the Town. If the Agreement is terminated for the convenience, the Town will pay the Contractor for costs incurred to that date of termination. The Town may also terminate this Agreement when funds are not appropriated or otherwise made available to support continuation of this Agreement in subsequent fiscal periods.
5. Should any part of this Agreement be rendered void, invalid, or unenforceable by any court of law, such a determination shall not render void, invalid, or unenforceable any other part of this Agreement.
6. This Agreement has been made and entered into in the State of South Carolina, and the laws of South Carolina shall govern the validity and interpretation of this Agreement in the performance due hereunder.
7. This Agreement may not be modified unless such modification is in writing and signed by both parties.
8. The Contractor may not assign this Agreement without the prior written approval of the Town.
9. The Contractor shall defend, indemnify, and hold harmless the Town, its officers, directors, agents, and employees from and against any and

## ATTACHMENT 2

all actions, costs, claims, losses, expenses, and/or damages, including attorney's fees, whether incurred prior to the institution of litigation, during litigation, or on appeal arising out of or resulting from the conduct of any activity hereby authorized or the performance of any requirement imposed pursuant by this Agreement, however caused or occasioned, unless caused by the willful misconduct or gross negligence of the Town.

10. The parties hereto intend that no master/servant, employer/employee, or principal/agent relationship will be created by this Agreement. Nothing contained herein creates any relationship between the Town and the Contractor other than that which is expressly stated herein. The Town is interested only in the results to be achieved under this Agreement, and the conduct and control of the agents and employees of the Contractor and the methods utilized by the Contractor in fulfilling its obligations hereunder shall lie solely and exclusively with the Contractor and its agents and employees shall not be considered agents or employees of the Town for any purpose. No person employed by the Contractor shall have any benefits, status, or right of employment with the Town.
11. The Contractor, by signing this Agreement, hereby certifies that Contractor shall comply with all applicable requirements of the South Carolina Illegal Immigration Reform Act, S.C. Code Ann. §41-8-10 (2007) et seq., (the "Act"), and that Contractor covenants and agrees as follows:
  - 11.1. Contractor shall not knowingly or intentionally employ any unauthorized alien and, unless excluded from coverage of the "Act", shall verify the work authorization of all new hirers performing work under the Agreement by registering and participating in the Federal Work Authorization Program (E-verify) and verifying the work authorization of every new yearly hired employee within three (3) business days after employing employee; or
  - 11.2. Contractor agrees to provide to the Town all documentation requested by it to establish either:
    - (a) the applicability of the South Carolina Illegal Immigration Reform Act to Contractor; or
    - (b) compliance with the South Carolina Illegal Immigration Reform Act by Contractor.
  - 11.3. Contractor agrees to include in any contracts with its sub- contractors language requiring its sub-contractors to:
    - (a) comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws; and
    - (b) include in their contracts with the sub-subcontractors language requiring the sub-subcontractors to comply with the

**ATTACHMENT 2**

applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws.

11.4. Contractor acknowledges and agrees that it shall comply with requirements of the Immigration Reform and Control Act of 1986 including the non-discrimination provisions thereof, and shall complete all required I-9 documentation for all workers employed by it.

11.5. Contractor certifies it shall comply with all state, federal, and local laws, rules, regulations and orders applicable to it in performance of work under the contract.

IN WITNESS WHEREOF, the parties hereto have affixed their signatures hereto the date first written hereinabove.

**WITNESSES:**

**<< CONTRACTOR’S FULL NAME >>**

\_\_\_\_\_

**By:** \_\_\_\_\_

\_\_\_\_\_

**Its:** \_\_\_\_\_

**WITNESSES:**

**TOWN OF HILTON HEAD ISLAND**

\_\_\_\_\_

**By:** \_\_\_\_\_

\_\_\_\_\_

**Joshua A. Gruber**  
**Its: Assistant Town Manager**

# ATTACHMENT 3

## CONTRACTOR AFFIDAVIT SOUTH CAROLINA ILLEGAL IMMIGRATION REFORM ACT

In accordance with the requirements of the South Carolina Illegal Immigration Reform Act, \_\_\_\_\_ ("Contractor") hereby certifies that it is currently in compliance with the requirements of Title 8, Chapter 14 of the South Carolina Code Annotated and will remain in compliance with such requirements throughout the term of its contract with the Town of Hilton Head Island, South Carolina

The Contractor hereby acknowledges that in order to comply with requirements of S. C. Code Annotated Section 8-14-20(B), it will Register and participate in the federal work authorization program (E-verify) to verify the employment authorization of all new employees; and require agreement from its subcontractors, and through the subcontractors, the sub-subcontractors, to register and participate in the federal verification employment authorization of all new employees.

The Contractor agrees to provide to the Town of Hilton Head Island upon request any documentation required to establish the applicability of the South Carolina Illegal Immigration Reform Act to the contractor, subcontractor or sub-subcontractor. The Contractor further agrees that it will, upon request, provide the Town of Hilton Head Island with any documentation required to establish that the contractor and any subcontractors or sub-subcontractors are in compliance with the requirements of Title 8, Chapter 14 of the S. C. Code Annotated.

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Contractor

Title: \_\_\_\_\_

## ATTACHMENT 3

### Construction

By signing its bid or proposal, Contractor certifies that it will comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws and agrees to provide to the Town of Hilton Head Island upon request any documentation required to establish either: (a) that Title 8, Chapter 14 is inapplicable both to Contractor and its subcontractors or sub-subcontractors; or (b) that Contractor and its subcontractors or sub-subcontractors are in compliance with Title 8, Chapter 14. Pursuant to Section 8-14-60, "A person who knowingly makes or files any false, fictitious, or fraudulent document, statement, or report pursuant to this chapter is guilty of a felony, and, upon conviction, must be fined within the discretion of the court or imprisoned for not more than five years, or both." Contractor agrees to include in any contracts with its subcontractors language requiring its subcontractors to (a) comply with the applicable requirements of Title 8, Chapter 14, and (b) include in their contracts with the sub-subcontractors language requiring the sub-subcontractors to comply with the applicable requirements of Title 8, Chapter 14.

### Non-Construction

By signing your offer, you certify that you will comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws and agree to provide to the Town of Hilton Head Island upon request any documentation required to establish either: (a) that Title 8, Chapter 14 is inapplicable to you and your subcontractors or sub-subcontractors; or (b) that you and your subcontractors or sub-subcontractors are in compliance with Title 8, Chapter 14. Pursuant to Section 8-14-60, "A person who knowingly makes or files any false, fictitious, or fraudulent document, statement, or report pursuant to this chapter is guilty of a felony, and, upon conviction, must be fined within the discretion of the court or imprisoned for not more than five years, or both." You agree to include in any contracts with your subcontractors language requiring your subcontractors to (a) comply with the applicable requirements of Title 8, Chapter 14, and (b) include in their contracts with the sub-subcontractors language requiring the sub-subcontractors to comply with the applicable requirements of Title 8, Chapter 14.