

Strategic Advisory Consulting Service Request for Qualifications (RFQ) January 28, 2020

GENERAL

The Atlanta Regional Commission, from time to time, has required strategic, management and organizational development consulting services as a key accelerant in the execution of our Evolution Strategy. These services were usually, but not exclusively, delivered over a period of six months to a year.

In the past, we have solicited these services through individual RFPs. This practice, while somewhat effective, presents challenges for the Agency to gain access for these relatively short-term services in a timely manner, when they are critically needed.

Consequently, ARC is seeking a team of qualified firms to create a pool of contractors for indefinite delivery/indefinite quantity professional services relating to strategic advisory to the agency. ARC intends to establish a contracting vehicle, on which qualified vendors will be placed, and from which ARC is able to select and award specific task orders in alignment with vendor qualifications and Agency needs. This contract vehicle will be for one year with an option to renew up to two additional one-year periods, and it will be funded up to, and not to exceed payments or obligations of no more than \$99,000 per year. All qualified applicants will receive consideration without regard to race, color, religion, sex, sexual orientation, gender identity or national origin.

BACKGROUND

The Atlanta Regional Commission, www.atlantaregional.org, (hereinafter “ARC” or the “Agency”) coordinates long range growth and development strategies for the ten (10) counties and seventy-four (74) cities surrounding the City of Atlanta, in an area defined by the State of Georgia. Those counties include Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry, and Rockdale. Along with the City of Atlanta, these eleven governments are the members of the Atlanta Regional Commission. The ARC was formed in 1971, by the Georgia General Assembly, but its predecessor organizations was founded in 1947, making it the oldest known, multijurisdictional public planning agency in the United States.

ARC’s work consists of several state defined and federally defined portfolios including: aging & independence services, arts & culture planning, community development, demographic and economic research, economic competitiveness, homeland security coordination, regional leadership development, transportation planning, water and natural resource planning, and workforce development. ARC is often a convener of regional leaders – government, business, nonprofit, civic, and philanthropic – to address critical regional challenges and opportunities. It has a deep, well-respected research and analytics capability that serves and supports not only governments and organizations in its 10-county territory, but others throughout the state of Georgia as well.

ORGANIZATION

ARC’s staff work in four (4) centers of excellence and innovation and the employee pool consists of over 200 full time staff, part time staff, and interns, who are professional planners, social workers,

economists, engineers, geographers, and more. The names of the Centers/Offices and their respective groups and functions are as follows:

The Center for Business Services

- Financial Services
- General Services
- Information Technology
- Legal
- Talent Management (HR)

The Center for Community Services

- Aging & Independence Services
- Homeland Security & Recovery
- Workforce Development

The Office of the Executive Director (OED)

- Government Affairs
- Executive Assistant

The Center for Livable Communities

- Community Development
- Community Partnerships
- Mobility Services
- Natural Resources
- Research & Analytics
- Transportation & Access Mobility

The Center for Strategic Relations

- Communications & Marketing
- Corporate & Community Engagement
- Creative
- Digital Strategy
- Event Planning & Coordination
- Local Government Relations

Each Center is led by a Senior Director/Center Director.

The Office of the Executive Director provides executive oversight and leadership for the organization, along with the functions of board administration and support, and (federal and state) government affairs. The Executive Director, the four Center Directors, the Government Affairs Manager, and the Executive Assistant form ARC's executive leadership team or "E-Team".

For the past seven years the agency has undergone an organizational culture transformation titled the Evolution Strategy. The Evolution Strategy is a core organizing and guidance concept based on five guiding principles:

- working in an *interdisciplinary* manner,
- developing *holistic* solutions, products and services,
- being *actionable* in our work,
- remaining *outcome-focused*, and
- *ensuring our colleagues success.*

NEED

In today's environment of accelerating change, the Agency's work relies heavily on strategic thinking and learning within the purview of our four Centers of Excellence and collectively as an organization.

While we encourage staff to stay current within their relevant domains, it's also important from time to time to invite outside perspective in to convene, present and facilitate conversations that insert relevant thinking and approaches to help the organization better:

- Connect the internal work we do across Centers and to the external environment

- Focus on the regions' future through a shared view that motivates and builds coalition
- Think in multiple time horizons as a means to bring the future into consideration today
- Engage through shared foresight and points of view to adapt and accelerate our collective work

As a part of the Evolution Strategy, ARC is increasingly looking to shape and establish its points of view on the role of other regional councils in the 21st century. In order to build our own strategic capacity and serve as a convener/thought leader nationally, we from time-to-time, have the following needs, which are representative, but not exhaustive:

- Work closely with the executive team to develop a shared understanding and/vision for the collective work of the agency or any one of the strategic units of the agency.
- Work with business units/groups in the agency, collectively or individually, to understand and adapt cultural norms in alignment with the principles of the Evolution Strategy.
- Provide coaching for executives, managers and/or supervisors in order to develop capacity to lead, or manager in new ways, and in new directions.
- Convene key stakeholders (both internally and externally) in a facilitated discussion to help define, design, develop and/or deploy new understanding and practices.

ASSIGNMENT

The selected Consultant(s) are expected to be able to assist the Executive Director and/or E-Team members with the following services:

- Provide thought partnership, strategic leadership advisement, strategic analysis/points of view.
- Perform/collaborate with leaders to develop environmental scans and curate relevant external trends, strategies and insights that help build greater organizational foresight.
- Development of ongoing vision clarity, guiding principles refinement, narrative development.
- Facilitate strategic level leader/team discussions.
- Synthesize discussions for insights and implications.
- Assess leader strategic thinking and adaptive capacity to demonstrate organizational progress.

PROPOSAL REQUIREMENTS

The Consultant is expected to provide the following information in support of establishing its qualification in the stated areas in which support is being sought:

- A. An overview of the firm or individual, including years of experience in the areas of leader/team effectiveness design, foresight design, narrative design, organization design, culture design and organizational development.
- B. A description of the services it has provided for other clients in these areas in the past five years.
- C. Four examples of engagements in the past five years, in which the Consultant has provided the services for which they are claiming qualification for in this document. Please include the scope of services performed for the client, the outcomes or results achieved, the length of time for the engagement.
- D. The Consultant's proposed method for deploying its stated capabilities, including all the services that will be provided. Also be explicit about what will not be provided, unless otherwise requested by the Agency.

- E. Five client references for which the client was satisfied with the Consultant's services. The Consultant is expected to provide accurate, current names and contact information for each of the references listed in the proposal.
- F. Any other material/information, the Consultant feels is helpful in conveying its understanding of the work being solicited and its ability to undertake and successfully complete said work.
- G. Representative staff, and their education and experience.
- H. For each qualified service area, please indicate your typical hourly rate (a range of rates is fine).

Our Intent is to select multiple awardees to be given access to this procurement vehicle. In order to issue specific task orders further information may be sought; for example, In addition to the above, the Agency may require:

- A. The Consultant's personnel who will be assigned to do this work, if selected, and each person's anticipated contribution. Please provide the individuals' backgrounds, to demonstrate that he or she has experience to undertake the tasks they will be expected to do as a part of the engagement.
- B. The estimated length of the engagement and how quickly the Consultant can begin once a task order is formally awarded.
- C. The basis of the fees to be charged to the ARC, and the estimated cost for completing the assignment.

AWARD PROCEDURE

ARC reserves the right to make an award without further discussion of the qualifications and/or subsequent proposals received. Therefore, it is important that the qualifications be submitted initially on the most favorable terms from both a technical and cost standpoint. After submission of the qualifications and closing thereof, no information will be released until after selection of vendors to the vehicle are determined. Vendor selection to the vehicle indicates that the Agency finds that vendor qualified to perform tasks for which they have been selected; however, vendors are not guaranteed to receive scope of works by virtue of their selection to the qualified list. ARC reserves the following rights: (1) to reject any and all qualifications received; (2) to decide to receive some, but not all, of the services requested in the Request for Qualifications; and (3) to select onto the contract vehicle none, one or more than one vendor(s). It is understood that any qualified proposal submitted will become part of the official file on this matter, without obligation or cost to the ARC.

While all qualified applicants will be considered, ARC does not intend to include every qualified vendor in the contract vehicle. Evaluation factors will include the following, with cost making up no more than 25 % of the basis for selection:

- Compliance with the instructions contained herein.
- Demonstrated ability to provide the services being solicited
- Breadth of experience with the services being solicited
- Cost based on the provided standard rates
- References

The same criteria will be considered when determining to which firm to award individual task order. When a specific service is needed that is eligible for the services provided on this contract vehicle, the

ARC Project Manager will reach out to all the firms on the contracting vehicle to receive quotes specific to the services needed. The quotes will be assessed with price being a predominate factor, and a task order will be issued to the one firm selected to do the specific work.

There is no page limitation on the Qualifications, but the Consultant is strongly encouraged to be as brief and concise as necessary. The ARC intends to review all Qualifications. ARC will also retain all Qualifications in its files for a period of time as recommended by the Agency's records retention guidelines. It reserves the right to interview a subset of submitted vendors submitting qualifications for further evaluation of the Consultants capabilities. Once evaluations have been completed, ARC will enter into fee negotiations with Qualified firm(s) upon the release of scopes of work.

In addition to the criteria above, there are a set of general criteria that apply, and qualified vendor should be mindful of when responding to this RFQ, and subsequent competitively awarded task orders:

- 1) Tasks orders will be awarded to firms based on perceived value (not simply cost). ARC reserves the right to determine "value."
- 2) Familiarity with ARC's Evolution Strategy provides a context and framework for not only what the Agency does, but more importantly, how the agency delivers value to its served communities – qualifies and selected vendors will have demonstrated and understanding of the principles of the Evolution Strategy in their responses.
- 3) Management consulting services are broad and widely varying – selection of qualified vendors and task awardees will be based on best fit in relation to the specific areas of need ARC anticipates at the time of the awards.
- 4) Finally, feedback from previous clients will be weighted heavily. Primarily because successful contractors should demonstrate the ability to management highly visible, time-sensitive and politically sensitive engagements consistently well.

ARC reserves the right to reject all Qualifications submitted and cancel this solicitation or to begin the process again, solely at its discretion.

The Agency will accept questions in writing (email or postal mail, but not text messaging) until 5pm 01/31/2020. All questions should be directed to

Ms. Brittany Zwald, Staff Legal Counsel
BusinessServicesRFP@atlantaregional.org
Atlanta Regional Commission
229 Peachtree Street, N.E.
Suite 100
Atlanta, GA 30303

All questions received, and responses to those questions, will be posted on the ARC website by 5:00 PM on 02/03/2020. All Qualifications must be received at the ARC reception desk of the Agency by **no later than 4:30pm 02/11/2020**, as recorded by the Agency's clocks. Firms must respond to this RFP with written proposals as well as electronic versions of their proposals in PDF format. ARC must receive two (2) hard copies, as well as one (1) electronic copy that may be sent via USB drive, or emailed to the contact previously included. Proposers are encouraged to submit their Qualifications in advance of that time. The Agency reserves the right to waive this deadline, solely at its discretion, should some

extraordinary acts of nature or manmade circumstances dramatically impair the typical traffic and mobility patterns the day of the aforementioned deadline.

From the date of the advertisement of the solicitation through contract award and selection is announced, respondents are not allowed to communicate about this solicitation or scope with any staff of ARC, except for submission of questions as instructed above, or as provided by any existing work agreement(s). ARC reserves the right to reject the submittal of any respondent violating this provision.

Conflict of Interest and Confidentiality

ARC is subject to the Georgia Open Records law. All proposals submitted will become public records to be provided upon request. Any information containing trade secrets or proprietary information, as defined by state law, must be marked as confidential to prevent disclosure. Confidential markings must be limited to the protected information. Entire proposals marked confidential will not be honored. Additionally, conflicts of interest are governed by the ARC Standards of Ethical Conduct available here: [Standards of Ethical Conduct](#). Respondents must disclose any potential conflicts of interest that may arise from the provision of services described herein. Such disclosure should include the name of the individual(s) with whom there is a conflict, any relevant facts to the potential conflict, and a description of the internal controls proposed to mitigate any such conflict. ARC's Staff Legal Counsel will determine whether such disclosure presents a potential organizational conflict of interest that should preclude award to the respondent.