



Atlanta Regional Commission

REQUEST FOR PROPOSALS

REGIONAL LEADERSHIP INSTITUTE 2021 FACILITATOR SERVICES

Atlanta Regional Commission (ARC), the regional planning and intergovernmental coordination agency for the 10-county Atlanta, Georgia region, seeks proposals for facilitator services from qualified individuals to facilitate the annual Regional Leadership Institute (RLI) in the Westin Savannah Harbor located in Savannah, Georgia, *Sunday, September 19, 2021 to Friday, September 24, 2021*. The facilitator for 2021 RLI is expected to learn the program, administer leadership assessments, assist in facilitation of pre-designed sessions, and design and facilitate leadership sessions. Proposals are subject to all applicable provisions of Georgia law.

The successful proposer will have demonstrated experience working with high level leaders across different sectors including business, non-profit, elected officials, philanthropy, and policy. In addition to having demonstrated experience working with different leadership groups, a successful proposer will have experience facilitating in different settings and with a range of facilitation styles. A successful proposer will also have experience navigating participants through difficult and challenging conversations, fostering a sense of community among diverse groups, facilitating leadership activities and leadership coaching. He/she will also possess content knowledge in areas such as equity, inclusion, and systems change.

Program Overview

RLI is a comprehensive leadership program designed to better prepare a diverse group of community, government, business and nonprofit leaders to work collaboratively in addressing regional issues. Program participants are comprised of leaders from public, private, and non-profit organizations operating in the Georgia Counties of Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry and Rockdale. The program provides leaders with content knowledge on key regional issues including education and housing as well as offers regional leaders activities and resources to help enhance their leadership capacity. Each day covers different issues faced by the Atlanta region.

RLI Mission

- Expand leaders' knowledge regarding key issues, opportunities, and challenges that face the Atlanta region;
- Build relationships of trust between businesses, government, non-profit, civic, religious, racial, ethnic, and cultural groups;
- Bring clarity to the role of community leadership and begin the development of key

leadership competencies required to lead the Atlanta region;

- Create a shared sense of community in the Atlanta region.

Facilitation and RLI

The facilitator and the program manager for RLI work together to plan and coordinate activities for the week in Savannah and make sure the leadership activities planned are well integrated into the week schedule. The facilitator and program manager will evaluate the program and discuss changes in a follow-up meeting.

Facilitator Primary Tasks:

- Prior to RLI, the facilitator will coordinate with RLI program manager to gain a comprehensive understanding of the program goals, content, and participants and the role of the facilitator in ensuring an appropriate flow and relation to leadership content and activities.
- Administer a leadership assessment tool, e.g. DISC and help participants understand their profile.
- During RLI, the facilitator will work with the program manager to facilitate pre-designed curriculum activities and discussions.
- Design and lead leadership activities.
- Act as a leadership coach during the week of RLI.
- Facilitate the connection and development of the participants as a cohort.
- Following RLI program in Savannah, meet RLI program manager and others for a full debrief and assessment of RLI.

Task 1: Program Planning

1. Administer a leadership assessment tool like DISC and assess participant profiles. Bring participant scores to the program. Create an activity or lesson to help participants understand their profiles.
2. Prepare a 2 ½ hour time block dedicated to a leadership exercise which encourages participant explore innovative leadership. Potential leadership models might include courageous leadership or collaborative leadership and exercises might explore adaptive challenges vs technical challenges.
3. Prepare three- five (5) interactive lessons and discussions (15-45 minutes) on leadership theory and best practices as it applies to the diverse leaders represented in the RLI class and their roles in the Atlanta region.
4. At least 2 and no more than 4 meetings with the RLI program manager and RLI curriculum consultant to discuss facilitation of pre-designed activities.

Task 2: Program Implementation and Facilitation

Program facilitator is a content and conversation connector throughout the week-long RLI program. The facilitator serves as a leadership coach, supports the development of community and guides in cohort in leadership development activities and discussions. It is the facilitator's responsibility to:

1. Assist the RLI Program Manager with the flow of the program, time and schedule.
2. Coordinate with the RLI program manager on pre-planned group exercises/activities.
3. Facilitate group exercises and activities and discussion, including pre-planned activities.

- a. Observe and establish bridges and connections between topics for participants.
 - a. This is essential to underscore the purpose of the activities in the day and in the week.
 - b. Recognize the fluid nature of learning and conversation and be nimble enough to adapt accordingly in exercises and discussion.
4. Help participants through exercises and discussions, think about how to apply knowledge gained over the week, and take action upon completing the week's program.
5. Work with the program manager to set and review the day's agenda.
 - a. The facilitator should be taking notes of major themes, ideas, and discussion points during the day. Was there an aha moment? These notes will inform and support the connective comments the facilitator makes and setting the agenda for the next morning.
6. Prompt the participants to think about a shared purpose and comprehend themselves within a larger region.
7. The facilitator will meet with the RLI staff in the afternoon to review the day and plan for the following day.

Task 3- Debrief and Program Review

The facilitator will:

- a) One meeting with RLI program manager and RLI curriculum consultant to occur no later than mid October.
- b) Meet with the RLI program manager to debrief the facilitation and RLI program by the end of October.

Project Timeline

The 2021 Regional Leadership Institute will be held from *Sunday, September 19, 2021 to Friday, September 24, 2021*.

Periodic preparation and coordination activities will take place from June 2021 up until the event. The facilitator will meet with the RLI team following the event to debrief, lead evaluation and assessment review, and/or to guide on post-programming leadership assignment follow-up.

INSTRUCTIONS TO PROPOSERS

Applicant Eligibility

Individuals and organizations, whether for-profit or not-for-profit, having the appropriate experience and specific expertise necessary to carry out the duties and responsibilities outlined in the RFP are eligible. (If proposal comes from an organization, the specific individual to provide co-facilitation services must be identified.) All proposers must have demonstrated similar project experience to be eligible for consideration. The Atlanta Regional Commission reserves the right to check all references furnished and consider the responses received in evaluating the proposals.

Proposal Content

The proposal shall not exceed ten (10) pages and contain, at a minimum, the following sections:

- 1) Proposal transmittal letter.
- 2) Point of contact (name, title, phone number, mailing address, and email address).
- 3) Qualifications and technical competence of facilitator in the type of work required, including certification in the use of leadership or personality assessments.
- 4) A description of experience facilitating similar programs, events and/or initiatives. Demonstrated experience facilitating groups of high-level leaders representing diverse perspectives and backgrounds. A description of any experience co-facilitating or facilitating in a team setting. Detail examples of programs facilitated in the last five (5) years.
- 5) Identify leadership tools/assessments that will be provided to participants.
- 6) A description of experience facilitating discussions involving topics such as equity, inclusion, race, and/or systems change. Identify key techniques, tools, exercises the facilitator might employ to aid RLI participants in building leadership skills in these areas.
- 7) Provide two (2) references including the name of the clients, description of work done, dates of the project, and the primary client contact including the name, address, and telephone number.
- 8) Detailed Project Timeline as shown in Exhibit A. Include the number of hours proposed for the scope of work, including advance preparations, coordination meetings, and the weeklong RLI event.
- 9) Proposed project budget by tasks as shown in Exhibit B
- 10) Contract forms in Exhibit C
- 11) Any other pertinent information.

Proposal Evaluation Criteria

Award will be made to that responsible proposer, whose offer conforming to this RFP is considered most advantageous to the RLI program, considering the Evaluation Criteria in this section. Neither the lowest priced nor the highest scoring proposal will necessarily be selected. ARC reserves full discretion to determine the competence and responsibility, professionally and/or financially, of proposers.

ARC reserves the right to:

- Select for contract or for negotiations a proposal other than that with lowest costs.
- Reject any and all proposals or portions of proposals received in response to this RFP or to make no award or issue a new RFP.
- Waive or modify any information, irregularity, or inconsistency in proposals received.
- Request modification to proposals from any or all proposers during the contract review and negotiation.
- Negotiate any aspect of the proposal with any proposer and negotiate with more than one proposer at the same time.

The proposal evaluation will consider:

- Relevant Past and Present Performance Criteria: Assessment of the proposer's past and

present performance will be evaluated relative to the capability to meet the scope of work to be performed (30%).

- Experience with leadership tools/assessments, and appropriateness of tools and activities to the program scope and mission. The proposer should demonstrate an ability to facilitate diverse groups, engage leaders across sectors, and navigate challenging discussions, particularly those involving race, nationality, class and gender (30%).
- Experience and knowledge of leadership tools and practices involving equity, inclusion, facilitating difficult conversations, and systems change (30 %)
- Proposed budget: The amount of time allotted to appropriately plan for and carry-out the RLI facilitator services will be considered. Budget is a consideration, but not the only deciding factor (10%). (See Attachment C.)

Submission of Proposal

To receive consideration, proposals must be submitted in accordance with the following instructions:

Firms and/or individuals must respond to this RFP with written proposals as well as electronic versions of their proposals in PDF format. Proposals must be emailed to Folashade Alao at falao@atlantaregional.org. ARC must receive one (1) hard copy via the address below. Please email confirmation and tracking information of the proposal to Folashade Alao at falao@atlantaregional.org.

Proposals must be submitted to the following address:

Atlanta Regional Commission
ATTN: Folashade Alao, PhD
Community Partnerships Group
229 Peachtree Street, NE, Suite 100
Atlanta, GA 30303

Submittals must be received at the ARC by 12:00 noon ET on **Tuesday, June 8, 2021**. The Atlanta Regional Commission reserves the right to reject any and all proposals, and has the right, at its sole discretion, to accept the proposal it considers most favorable to the organization's interest and the right to waive minor irregularities in procedures.

Contact

Additional information should not be required to respond to this RFP. However, questions should be submitted in writing to Folashade Alao at falao@atlantaregional.org. All questions must be submitted by 5:00pm on Friday, May 21, 2021 to ensure a response. All questions received and responses to the questions will be posted on the ARC website by 5:00pm on Tuesday, May 25th.

Other Information

Interviews: Proposers may be invited to an interview with the RLI Program Manager and other organization leaders. Selected organizations/individuals will be contacted regarding time and location of an interview, if applicable. ARC reserves the right to award this contract based on initial proposals without conducting interviews.

Compliance with Rules: Proposers responding to this RFP must follow its procedures and requirements. Failure to comply with or complete any part of this RFP may result in rejection of your proposal.

Proposal Withdrawal: Any proposal may be withdrawn at any time before the "Proposal Due" date and time by providing a written request for the withdrawal to the issuing office. A duly authorized representative of the organization shall make the request. Withdrawal of a proposal will not preclude the proposer from filing a new proposal.

Ownership of Documents: Any material submitted by a proposer shall become the property of the Atlanta Regional Commission.

Confidentiality and Conflict of Interest: 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 as 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 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.

Exhibit A

Detailed Project Timeline

Project Timeline – *Periodic preparation and coordination activities will take place from June 2021 up until the event. Projected timeline is an estimate of hours required and program may require facilitator flexibility to meet outside listed timeline dates.*

| Project Targets | Deadline Date | # of Hours (est.) |
|--|-----------------------------------|-------------------|
| RLI TEAM planning meetings | July 1 – September 19, 2021 | |
| Regional Leadership Institute – Savannah, GA | September 19 – September 24, 2021 | |
| RLI Debrief | October 2021 | |
| | | |
| | TOTAL: | |

Exhibit B

Proposed Project Budget

| <u>TASK</u> | <u>AMOUNT</u> |
|---|----------------------|
| Task 1 – Program Planning | |
| Task 2 – Program Implementation and Facilitation | |
| Task 3 – Program Debrief and Review | |
| <u>TOTAL</u> | |

Exhibit C

Contract Forms

GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT AFFIDAVIT

CONTRACTOR AFFIDAVIT

By executing this affidavit, the undersigned person or entity verifies its compliance with O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm, or entity which is contracting with the Atlanta Regional Commission has registered with, is authorized to participate in, and is participating in the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91.

The undersigned person or entity further agrees that it will continue to use the federal work authorization program throughout the contract period, and it will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the undersigned with the information required by O.C.G.A. § 13-10-91(b).

The undersigned person or entity further agrees to maintain records of such compliance and provide a copy of each such verification to the Atlanta Regional Commission within five (5) business days after any subcontractor is retained to perform such service.

E-Verify User Identification Number

Date of Authorization

Company Name

BY: Authorized Officer or Agent

Title of Authorized Officer or Agent of Contractor

Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN
BEFORE ME ON THIS THE

____ DAY OF _____, 201__

[NOTARY SEAL]

Notary Public

My Commission Expires: _____

CONTRACTOR/VENDOR INFORMATION

Legal name & address of
entity with which
ARC is to contract: _____

If different from above-
Legal name of Payee: _____
Payment Address: _____

(If additional addresses are needed, identify each and its purpose on the reverse of this page).

Legal entity status (please mark all that apply):
 Corporation Partnership Individual Sole Proprietor
 501C3 501C4 Other Non-profit (describe) _____
 State Government County/Local Government
Other(describe): _____

(Federal) Employer Identification Number: _____
OR
Social Security Number (for an individual): _____

Is this contractor/vendor an attorney/law firm? YES NO

Is this contractor/vendor debarred, suspended, ineligible or excluded from participation in federally funded projects? YES NO

Is this contractor/vendor a:
Disadvantaged Business Enterprise under 49 CFR Part 26? YES NO
Minority or Women

If YES, attach a copy of current certification(s).

Is this contractor/vendor a Non-federal entity that expends \$500,000 or more in a year in Federal awards?
YES NO

If so, attach a copy of most recent single or program-specific audit conducted in accordance with the provisions of OMB Circular A-133.

Certified true and correct:

Name: _____
Title: _____

Signature: _____
Date: _____