



RFP#2024-07

Organizational Development Services

- Issue Date: Tuesday, February 13, 2024
- Deadline for Questions: Tuesday, March 5, 2024
- Submittal Deadline: Proposals will be accepted until 2:00 p.m. (EST) on Tuesday, April 2, 2024
- Submittal Copies: One (1) copy in PDF format must be submitted by email to MZLorke@ssseva.org with subject **“Senior Services Organizational Development Initiative RFP#2024-07”**
- Contact information: All inquiries for information should be directed by email to Monika Zajac-Lorke, Executive Assistant, MZLorke@ssseva.org .

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REQUEST FOR PROPOSALS

Senior Services of Southeastern Virginia (Senior Services) is seeking proposals from a person or firm with the means and experience to provide consultation, collaboration, and support for its organizational development efforts for up to 4 months beginning April 9, 2024. Key areas of analysis and recommendation include: Staffing levels, Pay Scale, Bonus compensation planning, Pay for performance model, and Hybrid work management.

Background

Senior Services of Southeastern Virginia is the regional organization in South Hampton Roads and Western Tidewater that supports and enriches the lives of seniors and their families through advocacy, education, information, and comprehensive services. For more than 50 years we have changed the lives of tens of thousands of the region's seniors for the better. We have served over two million meals, contributed more than six million hours of senior volunteer services, driven seniors over 11 million miles and helped thousands of seniors live in their homes independently as an alternative to nursing home care.

We are a private, nonprofit organization, and we serve residents in Chesapeake, Franklin, Norfolk, Portsmouth, Suffolk, Virginia Beach, and Isle of Wight and Southampton counties. Services include Case Management, In-Home Care, Meals on Wheels home-delivered meals and congregate meals, Care Transitions, Evidence-Based Wellness classes, I-Ride Transportation, Medicare Benefits Counseling and more.

Senior Services receives funding from federal, state, municipal and private sources.

Mission: To provide seniors and their caregivers with access to programs and services so they may live their lives with choice and dignity in their communities

Vision: We envision a community that empowers, respects, and values seniors and their caregivers.

Values: Act with courage; Create trust; Exhibit respect; Deliver results

Objective of this solicitation:

Senior Services intends to issue a contract to a qualified vendor with demonstrated experience who is available to provide services within the date range noted in the Project Scope below.

1.0 PROJECT SCOPE

Senior Services of Southeastern Virginia is seeking support and assistance from a person or firm with the capabilities and expertise to provide organizational development analysis and recommendations that will set the organization in a continued position of growth. The project will start on April 1, 2024, and end on July 31, 2024.

Strategic Priorities: We are seeking your assistance in conducting a comprehensive organizational assessment and providing recommendations in the following areas:

1. Staffing Evaluation:
 - Evaluate our current staffing at each level of the organization to determine if we are top-heavy, balanced, or in need of additional staff.
 - Provide insights and recommendations on optimizing our workforce to improve efficiency and productivity.
2. Compensation and pay equity:
 - Evaluate CEO compensation based on percent of revenue compared to other Area Agencies on Aging in the Commonwealth including: PSA 6, 7, 10, 11, 13, 14, 15, 21, 22 and any others deemed necessary.
 - Evaluate all other staff (including Controller, CFO, SDO & director-level compensation structure and pay scales).
 - Assess the competitiveness of our compensation packages in the market.
 - Provide recommendations for adjustments or enhancements to ensure fair and competitive compensation for our staff.
3. Development of Director Level Bonus System:
 - Design and develop a bonus system for our director-level employees.
 - Create a performance-based framework that aligns with our organizational goals and objectives.
 - Ensure the bonus system motivates and rewards exceptional performance while fostering a culture of collaboration and teamwork.
 - Verify that any suggested bonus structure meets with the Department of Aging and Rehabilitative Services requirements.
4. Pay for Performance Merit-Based Model:
 - Develop and recommend a pay for performance merit-based model for annual pay increases.
 - Design a fair and transparent system that rewards employees based on their individual performance, skills, and contributions.
 - Provide guidance on implementing and managing the model effectively.
5. Management of Remote Work in a Hybrid Office Model:
 - Propose a process for effectively managing remote work within a hybrid office model.
 - Develop policies, guidelines, and best practices to ensure seamless collaboration and productivity among remote and in-office employees.
 - Address challenges related to communication, performance management, and employee engagement in a hybrid work environment.
6. Additional Organizational Development Efforts:
 - Identify any other pertinent areas for further organizational development efforts based on the assessment findings.

- Provide recommendations and strategies to address those areas and drive positive change within our organization.

SENIOR SERVICES expects the selected firm to:

1. Work independently and collaboratively with in-house staff to obtain the desired results.
2. Provide analysis and implementation plan for each area identified.

2.0 MANAGEMENT/OWNERSHIP

Unless otherwise negotiated, all deliverables and/or other products of the contract (including but not limited to all procedures, solicitation packages, reports, records, summaries, software documentation and other matter and materials prepared or developed by the Contractor in performance of this contract) shall be the sole, absolute and exclusive property of SENIOR SERVICES, free from any claim or retention of rights thereto on the part of the Contractor, its agents, subcontractors, officers, or employees.

3.0 INSTRUCTIONS TO OFFERORS

3.1 REQUIRED INFORMATION

One (1) copy in PDF format of the proposal shall be submitted.

The following items shall be submitted with each offer/proposal. Failure to include ANY of these items may result in a proposal being rejected. There is no page limit or formatting requirements.

Part 1. RFP Forms

The Offeror must provide the following forms, signed by a principal in the firm or individual submitting the proposal on behalf of their company or consortium:

- Attachment 1: “Contractor Information & Certifications”
- Attachment 2: “Bid Form”

Part 2. Qualifications & Experience

The proposal must include information describing the background and experience of each firm member and key individuals that will perform all or parts of the proposed services. The inclusion of links to project examples is strongly encouraged.

Part 3. Proposed Services

A. Project Understanding

The proposal must demonstrate an understanding of the project objectives, providing a clear indication of the ability to perform within the required schedule.

B. Proposed Approach

The proposal must describe the approach that will be taken to work strategically with SENIOR SERVICES.

Part 4. Cost Proposal

Proposers must provide an estimate of labor hours and other direct costs that would be necessary to fulfill the requirements of this RFP.

Part 5. References

Provide a minimum of three (3) references, complete with email address and telephone number, of the clients for which the Offeror has performed similar or complimentary work.

Part 6. Corrections, Amendments, and Clarifications

Include signed copies of all corrections, amendments, and clarifications to this RFP. Such corrections, amendments, and clarifications will be emailed to all participating RFP respondents.

Part 7. Participation by Minority and/or Woman-Owned Businesses

The use of minority-owned and/or woman-owned business enterprises (MWBE) is not only encouraged, it is rewarded during the proposal evaluation process. In the event an offeror proposes to use a certified MWBE, a letter of intent signed by both parties must be submitted to SENIOR SERVICES as Part 7 of the proposal submission.

3.2 INQUIRIES

All inquiries must be submitted in writing to the email address noted on the cover page of this solicitation by the date shown on the cover page. Questions will be answered formally via addendum to the solicitation soon after the deadline for submitting questions. Any correspondence related to the RFP should refer to the appropriate RFP number, page, and paragraph number.

3.3 ACCURATE INFORMATION

Failure to provide complete and accurate information in an offer to this solicitation may result in your proposal being deemed nonresponsive. SENIOR SERVICES may institute debarment proceedings against the Offeror and/or terminate any contract or purchase order that has been awarded based on inaccurate information.

3.4 PROPOSAL OPENING

Proposals shall be opened on the date and time designated on the cover page of this document, unless provided otherwise by an amendment to the RFP. All proposals and any

modifications and other information received in response to the RFP shall be shown only to authorized personnel having a legitimate interest in them or persons assisting in the evaluation.

Late proposals will not be considered. Any Offeror submitting a late proposal shall be notified.

3.5 VALIDITY OF PROPOSALS

All proposals shall be valid for a period of sixty (60) days from the closing date of the solicitation unless another timeframe is agreed to by all parties. Submission of proposals does not afford rights to the Offeror nor obligate SENIOR SERVICES in any manner.

3.6 PROPOSAL AND PRESENTATION COSTS

SENIOR SERVICES will not be liable for any costs incurred by an Offeror in the preparation of its response to a solicitation, nor for the presentation of its proposal and/or participation in any clarifications, discussions, negotiations, or protests.

3.7 AMBIGUITY, CONFLICT, OR IRREGULARITIES IN SOLICITATION OR PROPOSAL

Offeror is responsible for clarifying any ambiguity, conflict, discrepancy, omission, or other error in this solicitation prior to submitting their offer, or it shall be waived. Claims of ambiguity after submission of the offer shall not serve as grounds for a protest.

If an Offeror discovers any ambiguity, conflict, discrepancy, omission, or other error in the solicitation, they shall immediately request modification or clarification in writing via email to the address of the person identified on the cover page. Required modifications or clarifications will be issued by solicitation amendment.

SENIOR SERVICES reserves the right to waive minor irregularities in proposals, provided that such action is in the best interest of SENIOR SERVICES. Any such waiver shall not modify any remaining solicitation requirements or excuse the Offeror from full compliance with the solicitation specifications and other contract requirements if the Offeror is awarded a contract.

3.8 SOLICITATION ACCEPTANCE AND ACCEPTANCE PERIOD

The offeror must indicate acceptance of the final version of this solicitation as amended. A response to a Request for Proposal is an offer to contract SENIOR SERVICES based upon the terms, conditions, scope of services and specifications contained in this Request for Proposal. Proposals are an irrevocable offer for ninety (90) days after the proposal opening time and date.

3.9 OFFEROR'S RIGHTS

All materials submitted in response to this RFP become the property of SENIOR SERVICES upon delivery and are to be appended to any formal documentation, which would further define or expand the contractual relationship between SENIOR SERVICES and the Offeror.

4.0 EVALUATION OF PROPOSALS

4.1 CRITERIA FOR PROPOSAL EVALUATION

Proposals shall be evaluated on three separate criteria. The maximum score is 100 points.

WEIGHT	CRITERION
40 points	Ability to Meet Scheduled Requirements
55 points	Qualifications and Experience
5 points	MWBE Participation

4.2 PROPOSAL INTERVIEWS

Based upon the evaluation of the written proposals, SENIOR SERVICES may request teams to participate in an in-person or telephone interview to answer questions or to provide a demonstration.

4.3 AWARD OF CONTRACT

Notwithstanding any other provision of this RFP, SENIOR SERVICES expressly reserves the right to:

1. Waive any immaterial defect or informality, or
2. Reject any or all proposals, or portions thereof, or
3. Select a vendor already under contract for similar services, or
4. Cancel or reissue the solicitation.

Attachment 1 Contractor Information & Certifications

Attachment 2 Bid Form