**MQ 5: Completed Attachment 4, Written Proposal Template, must be submitted by Deadline for RFP Proposals for this Solicitation.**

*Instructions are provided in blue and may be deleted. Proposer shall use this document as a template on which to provide their Written Proposal response. In order to receive the maximum amount of points, please be sure to follow this format and thoroughly (but concisely) to address each section. Indicate clearly where supplemental documents are being provided. Proposals that fail to address each of the requested items in this document in a sufficient and complete manner will be deemed Non-Responsive and/or receive zero points. Do not include marketing materials.*

### *Before getting started, please ensure that your Proposal meets the Minimum Qualifications so that it will be evaluated. Proposals received under this RFP that fail to address each of the requested items in this RFP Attachment 4: Written Proposal Template in sufficient detail to substantiate that the Proposer has met the City’s Minimum Qualifications, will be deemed non-responsive and will not be evaluated.* *Proposers may not leave responses to questions blank and may not respond to questions with “To be provided upon request,” “To be determined,” or the like.*

**Note that all documents under this RFP process are subject to public disclosure. Therefore, please exclude or otherwise mark for redaction any confidential or proprietary information as appropriate.**

1. **Proposer Information**

 **Firm Name**

Insert Response Here.

**II. Minimum Qualifications Documentation – Pass/Fail**

Any proposal that does not demonstrate that the Proposer meets these Minimum Qualifications by the Deadline for RFP Proposals will be considered non-responsive and will not be evaluated. Be sure to complete this section, as described.

## 1. Proposer Certification

The Proposer certifies that the following items are included in the Proposal package and submitted to the City by the Deadline for RFP Proposals. If any of these Minimum Qualifications (MQ) are marked “No”, then Proposal will not pass MQ and will not be evaluated.

|  |  |  |
| --- | --- | --- |
| **MQ #** | **Description** |  |
| **MQ 1** | Completed Attachment 1, City’s Contract Terms and Proposed Changes (if any). | [ ]  **Yes** [ ]  **No** |
| **MQ 2** | Completed Attachment 2, CMD LBE Forms. *Note: LBE requirements have been waived*. Form 3 CMD Compliance Affidavit and Form 5 CMD Employment Form are required. If CMD Forms are not completed correctly and submitted by Deadline for RFP Proposals, then Proposals may be deemed unresponsive and not evaluated. For questions on CMD Forms, immediately contact: Contract Monitoring Division’s Contract Compliance Officer, antonio.tom@sfgov.org.  | [ ]  **Yes** [ ]  **No** |
| **MQ 3** | Completed Attachment 3, Part I Proposer Questionnaire and Part II References.  | [ ]  **Yes** [ ]  **No** |
| **MQ 4** | Completed Attachment 3, Part III Proposer has provided three professional references. | [ ]  **Yes** [ ]  **No** |
| **MQ 5** | Completed Attachment 4, Proposers Written Proposal.  | [ ]  **Yes** [ ]  **No** |
| **MQ 6** | In Attachment 4, Proposer has certified firm has five years of experience. | [ ]  **Yes** [ ]  **No** |
| **MQ 7** | Proposer has submitted two similar prior project descriptions (that Proposer has been engaged in or completed) within the last 5 years in services requested by this Solicitation. | [ ]  **Yes** [ ]  **No** |
| **MQ 8** | Completed Attachment 5, Cost Proposal Template. | [ ]  **Yes** [ ]  **No** |
| **MQ 9** | Attachment 5, Proposer’s Cost Proposal for Services Requested not exceed $100,000. | [ ]  **Yes** [ ]  **No** |
| **MQ 10** | Completed Attachment 8, City’s Nondisclosure Agreement and Proposed Changes (if any). | [ ]  **Yes** [ ]  **No** |

**VI. Written Proposal (95 Points)**

1. **Proposer Firm Qualifications (20 Points)**

## Firm History and Structure (5 Points)

Briefly describe your firm, including history and structure, number of years in business, including total staff size and composition, organizational structure, ownership structure, and commitment to diversity and inclusion practices to services under this RFP.

Insert Response Here.

## Firm Experience (5 Points)

Briefly describe your firm’s experience providing services in strategic planning for similar organizations, including:

1. Development of a five-year strategic plan including goals, strategies and tactical initiatives
2. Development of operational tools to implement, measure and review the strategic plan and progress towards goals identified in the plan.

Insert Response Here.

## Relevance of Prior Project Descriptions (10 Points)

MQ 7: In Attachment 4, Proposer has submitted two similar Prior Project Descriptions (that Proposer has been engaged in or completed) developing a Strategic Plan. The Prior Project Descriptions must not be more than 5 years old from the date of RFP issuance.

Using the template on the following pages, provide two similar Prior Project Descriptions per MQ 7.

Prior Projects previously managed by the Proposer or, if applicable, JV Partners must be within the last 10 years, and be of the type and scope of services specified in this Solicitation.

If Proposer submits more than two (2) Prior Project Descriptions, then only the first two (2)

Prior Project Descriptions will be evaluated.

The Prior Project Description(s) in RFP Attachment 4 will be used to verify the Proposer’s comparability of experience and to determine whether or not the Proposer meets MQ 7.

Contacts for each Prior Project are required, and may serve as references for the Proposer. The City will not inform Proposers when references will be contacted. The Proposer should ensure that client contact information listed in the response is up-to-date and should notify clients that the City may be contacting them.

Failure to provide the information as requested may result in rejection of your proposal.

|  |
| --- |
| **Prior Project Description #1:** The descriptions shall include each item listed below. |
|  |
|  |
|

|  |  |
| --- | --- |
| Project Name | Project Name |
| Project Dates | Dates when the project was performed |
| Project Costs | $00,000.00 |
| Client Name  | Client Agency, Department, or Unit Name |
| Client Contact Name and Title |  |
| Client Contact Phone |  |
| Client Contact E-mail |  |

 |
| **Project Scope Summary.** Describe Scope/Summary of the Project. Project must be of the type and scope of services specified in this Solicitation. Provide sufficient information to give City insight into the size/complexity and scope of project compared to what is requested in this Solicitation.Insert Response Here.**Roles and Responsibilities.** Describe your firm’s role and responsibilities in the project. |
|  |
| Insert Response Here. |
|  |
| **Performance.** Describe your firm’s performance on delivering the project on schedule and on budget. What, if any, measurable service deliverables or outcomes can be attributed to your services. |
|  |
| Insert Response Here. |
|  |
| **Project Staffing.** Identify your firm’s staff members who worked on the project. Identify each lead person on your project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.  |
|  |
| Insert Response Here. |

|  |
| --- |
| **Prior Project Description #2:** The descriptions shall include each item listed below. |
|  |
|  |
|

|  |  |
| --- | --- |
| Project Name | Project Name |
| Project Dates | Dates when the project was performed |
| Project Costs | $00,000.00 |
| Client Name  | Client Agency, Department, or Unit Name |
| Client Contact Name and Title |  |
| Client Contact Phone |  |
| Client Contact E-mail |  |

 |
| **Project Scope Summary.** Describe Scope/Summary of the Project. Project must be of the type and scope of services specified in this Solicitation. Provide sufficient information to give City insight into the size/complexity and scope of project compared to what is requested in this Solicitation.Insert Response Here.**Roles and Responsibilities.** Describe your firm’s role and responsibilities in the project. |
|  |
| Insert Response Here. |
|  |
| **Performance.** Describe your firm’s performance on delivering the project on schedule and on budget. What, if any, measurable service deliverables or outcomes can be attributed to your services. |
|  |
| Insert Response Here. |
|  |
| **Project Staffing.** Identify your firm’s staff members who worked on the project. Identify each lead person on your project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the engagement.  |
|  |
| Insert Response Here. |

**B. Project Approach – 65 Points**

## Work Plan/Approach (45 Points)

Describe your firm’s Work plan/approach and understanding of the project and the tasks to be performed. Development of a five-year strategic plan including goals, strategies and tactical initiatives. Strategic plan should include:

1. An executive summary
2. Vision
3. Mission
4. Five year Goals
5. Strategies
6. Measurable objectives

Insert Response Here.

1. **Project Timliness** **(5 Points)**

Describe your firm’s ability to complete the project in a timely manner

Insert Response Here.

## Expectations and or assumptions (10 Points)

Describe your firm’s expectations and or assumptions of expectations and or assumptions or level of effort including review, approval and other communications protocols necessary to successfully complete the services.

Insert Response Here.

## Methodology to create competitive differences (5 Points)

Describe your firm’s expertise or methodology to create competitive differences that will beneficial to the City.

Insert Response Here.

**C. Project Team – 10 Points**

**1a. Key/Lead Team Members (5 Points**)

Using the following tables, please provide the role, responsibilities, qualifications, and company affiliation of Key/Lead Team Members who will perform the services outlined in this Solicitation. Discuss each team member’s background and experience in order to demonstrate a strong ability to successfully perform the work. Include as many tables as needed. Provide resumes.

|  |  |
| --- | --- |
| Name, Title | Insert Response Here. |
| Proposed Project Role and Responsibilities | Insert Response Here. |
| Relevant Experience | Describe experience with services described in this Solicitation. Insert Response Here.  |
| Education | Insert other qualifications or educational background narrative here. |

## 1b. Other Team Members (5 Points)

Using the following tables, please provide the role, responsibilities, qualifications, and company affiliation of Other Team Members who will perform the services outlined in this Solicitation. Discuss each team member’s background and experience in order to demonstrate a strong ability to successfully perform the work. Include as many tables as needed. Provide resumes.

|  |  |
| --- | --- |
| Name, Title | Insert Response Here. |
| Proposed Project Role and Responsibilities | Insert Response Here. |
| Relevant Experience | Describe experience with services described in this Solicitation. Insert Response Here. |
| Education | Insert other qualifications or educational background narrative here. |