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Travis Anderson

109 West Main,
Cortez, CO
(970)565-8317

Request for proposal

Montezuma County

Request for proposal for conducting strategic planning services

Inquiries and proposals should be directed to:

Name: Travis Anderson

Title: County Administrator

Entity: Montezuma County

Address: 109 W. Main Street, Room 262 Cortez CO 81321

Phone: 970-565-8317

Email: tanderson@co.montezuma.co.us

Please consider sending your completed request for proposal (RFP) to:

Travis Anderson
tanderson@co.montezuma.co.us

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General information

A. Purpose

This request for proposal (RFP) is to seek proposals from qualified consultants for the purpose of obtaining information and pricing to conduct a far-reaching and inclusive process to inform and collaboratively create Montezuma County's strategic plan.

The plan will guide Montezuma County operations and decision making from May 2023 through December 31, 2026. It will define Montezuma County's role in the community, guide the organization's governance, and establish a framework for setting strategic priorities and operational goals while creating measurable and achievable service plans and timelines. The purpose of the strategic plan is to position Montezuma County to proactively provide service that meets the changing needs in a cost-effective manner and to educate stakeholders about Montezuma County's mission, vision, and values.

B. Who may respond

Only qualified individuals with experience with Strategic Planning may respond to this RFP.

C. Instructions on proposal submission

1. **Closing submission date:** Proposals must be submitted no later than 4:30 p.m. *February 14, 2023*
2. **Inquiries:** Inquiries concerning this RFP should be directed to Travis Anderson 970-565-8317. Proposers may direct questions via email, or a phone or in-person meeting.
3. **Conditions of proposal:** All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the proposer and will not be reimbursed by Montezuma County.
4. **Instructions to prospective contractors:**

Your proposal should be addressed as follows:

Name: Travis Anderson
 Title: County Administrator
 Entity: Montezuma County
 Address: 109 W. Main Street, Room 262, Cortez CO 81321
 tanderson@co.montezuma.co.us

It is important that the proposer's proposal be submitted in a sealed envelope clearly marked in the lower left-hand corner with the following information:

5. **Electronic copy submissions:** Proposals can be submitted electronically to the above email address by the closing submission date noted above. It is the responsibility of the proposer to ensure that the proposal is received by Montezuma County by the date and time specified above. Late proposals will not be considered.
6. **Right to reject:** Montezuma County reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based on the factors described in this RFP.
7. **Presentations:** At the discretion of Montezuma County proposers submitting proposals may be requested to make virtual presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected proposers. Not all proposers submitting a proposal will be asked to participate in oral presentations.
8. **Notification of award:**
 - a. It is expected that a decision about selection of the successful proposer will be made within two (2) weeks of the closing date for the receipt of proposals.

D. Description of entity and scope of work requested

Montezuma County is a governmental organization which is governed by a (3)-member board of commissioners. Administrative offices and all records are located at *109 W. Main, Cortez CO 81321*.

Specification schedule

A. Pricing

The proposer's proposed price for services should include a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated, including travel expenses.

B. Payment

Payment terms will be agreed upon with the proposer.

C. Confidentiality

The proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to Montezuma County, the proposer agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the Proposer's possession, to those employees on the Proposer's staff who must have the information on a "need to know" basis.

The Proposer agrees to immediately notify, in writing, Montezuma County's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

Technical qualifications

The proposer, in its proposal, shall, as a minimum, include the following:

A. Understanding our needs

The proposer should describe the current challenges and opportunities specific to our organization. Describe how your firm is best suited to assist our organization in facing those challenges and opportunities moving forward.

B. Understanding the scope of work

The proposer should clearly describe the scope of work to be performed in alignment with this RFP. The successful proposer in this RFP process will accomplish the following, in addition to other inclusions identified throughout the RFP. These include:

- Develop a comprehensive timeline. This project should be completed no later than May 1, 2023.
- Facilitate a strategic planning process using a methodology acceptable for similar organizations to Montezuma County.
- Perform an analysis of the political, economic and social factors affecting Montezuma County.
- Engage internal and external stakeholders to gather critical input for the strategic planning process.
- Prepare the board, leadership, key staff and others to engage in strategic decision making around goals.
- Develop strategic priorities (three+ year goals), strategies (one-year goals), KPIs, 90-day accomplishments, and action plans that align with our mission, vision and values.
- Reflect the needs, voices and interests of a changing and diverse community.
- Include a process for Montezuma County to annually review and evaluate goals and develop new strategies based on the evaluation.
- Establish a method for evaluating progress and reporting on outcomes.

Optional scope options:

- Complete a community needs assessment that identifies the critical needs in the communities we serve.
- Asses the overall strengths, weaknesses, opportunities, and threats within our programs, activities and departments.

C. Understanding our industry

The proposer should describe its understanding of our industry by providing specific industry knowledge and expertise.

1. Prior experience working with similar organizations on similar projects.
2. Prior experience providing additional services to organizations similar to Montezuma County.

D. Engagement team

The proposer should briefly describe the qualifications of staff to be assigned to the engagement (if applicable). Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members.

E. Organization, size and structure

The proposer should describe its organization, experience level (in relation to work to be performed) and structure. Description should include:

1. Size of the proposer, including number of employees.
2. Industry specialization.

F. Approach to the engagement

The proposer should describe its approach to the work to be performed.

Proposal evaluation

A. Submission of proposals

Proposals should be submitted to *Travis Anderson* electronically or hardcopy by the date provided.

B. Nonresponsive proposals

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received in a timely manner in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers that the proposed undertaking would comply with requested work.

C. Proposal evaluation

Evaluation of each proposal will be scored on the following six factors:

- Understanding our needs
- Understanding our industry
- Organization size and structure of proposer's firm
- Qualifications of proposer's project team
- Proposer's approach to the engagement
- Price

See appendix for additional information.

D. Review process

Montezuma County intends to select the proposal that is most advantageous to itself. The responses to this RFP will be evaluated by the strategic planning RFP committee established for this purpose.

Montezuma County may, at its discretion, request presentations by or meetings with any, all or none of the proposers to clarify or negotiate modifications to the proposers' proposals.

However, *Montezuma County* reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the proposer can propose.

Montezuma County contemplates award of the contract to the responsible proposer with the highest total points.

E. RFP schedule

1/18/23	RFP issued
2/1/23	Deadline for questions submissions
2/10/23	Deadline for receipt of proposals
2/13/23	Initial review of received proposals
2/14/23	Evaluation of proposals begins
2/21/23	Final decision is made

Proposal evaluation		
	Point range	Points earned
Understanding our needs Understanding our current challenges and opportunities Firm's approach to addressing our challenges	0-5	
Understanding our industry Prior experience working similar organizations on similar projects Prior experience providing additional services to organizations similar to <i>Montezuma County</i>	0-20	
Organization, size and structure of proposer's firm Adequate size of the firm Industry specialization	0-5	
Qualifications of staff to be assigned to the project Consulting team makeup Prior experience of the individual/firm	0-20	
Proposer's approach to the engagement Comprehensive methodology Engages a variety of stakeholder groups Collaborates with key leadership to achieve the desired outcomes Delivers clear outcomes Realistic timetable Ability to provide in-person Facilitation	0-30	
Price	0-20	
Total points	0-100	