Request for proposal

Compliments of Wipfli LLP

Updated October 2021

(Entity name)

Request for proposal for talent assessment and succession plan

Inquiries and proposals should be directed to:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Email the RFP to Brian Gaumont at [gfpbd@wipfli.com](mailto:gfpbd@wipfli.com) or mail to:

Brian Gaumont

Wipfli LLP

2501 West Beltline Hwy., Suite 401

Madison, WI 53713

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General information

A. Purpose

This request for proposal (RFP) is to contract for talent assessment and succession planning services to assist with retaining high-potential, key employees and to develop a succession for *(entity name’s)* leadership positions. *(Entity name)* is committed to establishing a pipeline of talent who are developed and ready to take on leadership roles when the opportunities arise.

B. Who may respond

Only qualified organizations with experience working extensively with nonprofit organizations may respond to this RFP.

C. Bidder’s conference

*(Note: If the entity will be holding a bidder’s conference, the date, time, location and other information relating to the conference should be included in this section.)*

D. Instructions on proposal submission

1. Closing submission date: Proposals must be submitted no later than 4:30 p.m. *(time zone)* on *(date).*
2. Inquiries: Inquiries concerning this RFP should be directed to (*name and telephone)*. Offerors may direct questions via email, a phone call or an 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 offeror and will not be reimbursed by *(entity name).*
4. Instructions to prospective contractors:

Your proposal should be addressed as follows:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Proposal submissions: Proposals are due by 4:30 p.m. on *(enter proposal due date)*. It is the responsibility of the offeror to ensure that the proposal is received by *(entity name)* by the date and time specified. Late proposals will not be considered.
2. Electronic submission: Proposals can be submitted electronically to the following email address: *(entity email address)*.
3. Mailed submission: Proposals can be submitted by mail. Send *(# of copies)* copies to the address above. It is important that the offeror’s proposal be submitted in a sealed envelope clearly marked in the lower left-hand corner with the following information:

Request for proposal  
4:30 p.m. *(proposal due date)*   
Proposal for talent assessment and succession plan

1. Right to reject: *(Entity name)* 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.
2. Presentations: At the discretion of *(entity name)*, offerors submitting proposals may be requested to make oral presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected offerors. Not all offerors submitting a proposal will be asked to participate in oral presentations.
3. Notification of award:
   1. It is expected that a decision about selection of the successful offeror will be made within *(#)* weeks of the closing date for the receipt of proposals.
   2. Upon conclusion of final negotiations with the successful offer, all offerors submitting proposals in response to this RFP will be informed, in writing, of the name of the successful offeror.

E. Description of entity

*(Entity name)* is a nonprofit organization that serves *(#)* counties in *(state(s))*. *(Entity name)* is a private, nonprofit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. It is governed by a *(#)-*member volunteer board of directors. Administrative offices and all records are located at *(address).* Other offices are located throughout the *(geographic)* area.

*(Note to Entity: Include a description of the intent, purpose and philosophy of the succession plan process and whether a current plan exists. Specify whether a plan needs to be updated or a new plan must be created.)*

*(Entity name)* has *(#)* full-time employees and *(#)* part-time employees, for a total of *(#)* employees.

Specification schedule

A. Scope of services

*(This part of the RFP should be customized to outline the services requested by the entity. Include only the services needed.)*

Based upon our needs, we request the following scope and approach:

1. Identifying and selecting entity leadership competencies
2. Identifying key positions to be incorporated into a succession plan
3. Identifying high-potential, high-performing individuals to include in the succession plan
4. Identifying key individuals who possess unique knowledge and talent, regardless of job title, and who would leave a significant void should they leave the entity
5. Assessing succession candidates for readiness for promotion, which includes documenting development opportunities to prepare each candidate for a leadership role
6. Training internal team members on process and tools to enable ongoing succession planning efforts

These steps culminate into a complete succession plan. The chosen offeror will facilitate the entire process, which may be facilitated by the entity in future years.

B. Other services requested

At the discretion of *(entity name)*,this engagement can be extended to include bids for the following additional services. *(Note to entity: List the services you would like to have quoted separately from the succession plan services.)*

* Comprehensive or departmental organizational structure assessment
* Job description title consolidation and alignment to structure
* Human resources department review
* Competency modelling
* Behavioral assessment (pre- and post-employment)
* Career pathing
* Leadership development
* Change management
* Strategic planning

C. Delivery schedule

The offeror is to transmit one copy of the draft report to *(entity name)*’s executive director *(or other appropriate title)*. The draft report is due on *(date).*

*If needed,* the offeror shall deliver *(#)* final reports to *(entity name)* no later than *(date)*.

D. Pricing

The offeror’s proposed price for services should include a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated.

E. Payment

Payment terms will be agreed upon with the offeror.

F. Confidentiality

The offeror agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to *(entity name)*, the offeror 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 offeror’s possession, to those employees on the offeror’s staff who must have the information on a “need to know” basis.

The offeror agrees to immediately notify, in writing, *(entity name)*’s authorized representative in the event the offeror determines or has reason to suspect a breach of this requirement.

Technical qualifications

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

A. Understanding our needs

The offeror 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 offeror should clearly describe the scope of work to be performed in alignment with this RFP.

C. Understanding our industry

The offeror should describe its understanding of our industry by providing specific industry knowledge and expertise, including:

1. Prior experience working with nonprofit organizations.
2. Prior experience consulting with organizations similar to *(entity name)*.
3. Prior experience providing additional services to organizations similar to *(entity name)*.

D. Engagement team

The offeror should briefly describe the qualifications of staff to be assigned to the engagement. Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members. Team bios should include education and position in organization.

E. Organization, size and structure

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

1. Size of the offeror, including number of employees.
2. Explanation of independence.
3. Any conflicts of interest that exist.

F. Approach to the engagement

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

Proposal evaluation

A. 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.

B. Proposal evaluation

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

Point range

1. Understanding our needs 0-5
   1. Understanding our current challenges and opportunities
   2. Firm’s approach to addressing our challenges
2. Understanding our industry 0-20
   1. Prior experience working with nonprofit organizations
   2. Prior experience consulting with organizations similar to *(entity name)*
   3. Prior experience providing additional services to organizations similar to *(entity name)*
3. Organization, size and structure of offeror’s firm 0-5
   1. Adequate size of the firm
   2. Expertise within the nonprofit sector
4. Qualifications of staff to be assigned to be performed. 0-20
   1. This will be determined from résumés submitted. Include education,  
      position in firm, and years and types of experience.
5. Offeror’s approach to the engagement 0-30
   1. Comprehensive methodology
   2. Inclusive approach to gather multiple perspectives
   3. Seeks to understand and support the team and organization
   4. Works in partnership with project team
   5. Leverages knowledge and experience from work with similar organizations
   6. Collaborates with key leadership to achieve the desired outcomes
   7. Realistic engagement timetable
6. Price 0-20

Maximum points 100

C. Review process

The *(entity name)* may, at its discretion, request presentations by or meetings with any or all offerors to clarify or negotiate modifications to the offerors’ proposals.

However, *(entity name)* 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 offeror can propose.

*(Entity name)* contemplates award of the contract to the responsible offeror with the highest total points.

Appendix

A. Sample proposal evaluation

Total points will be calculated from each board member, providing a total point value for each responding offeror. The offeror, meeting all of the outlined criteria, that also accumulates the highest total point value will be awarded the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| Proposal evaluation | |  |  |
|  | | Point range | Points earned |
| Understanding our needs | | **0-5** |  |
|  | Understanding our current challenges and opportunities |  |  |
|  | Firm’s approach to addressing our challenges |  |  |
|  | |  |  |
| Understanding our industry | | **0-20** |  |
|  | Prior experience working with nonprofit organizations |  |  |
|  | Prior experience and consulting with organizations similar to *(entity name)* |  |  |
|  | Prior experience providing additional services to organizations similar to *(entity name)* |  |  |
|  | |  |  |
| Qualifications of staff to be assigned to the project | | **0-20** |  |
|  | Prior experience of the individual consulting team members |  |  |
|  | |  |  |
| Organization, size and structure of offeror's firm | | **0-5** |  |
|  | Adequate size of the firm |  |  |
|  | Expertise within the nonprofit sector |  |  |
|  | |  |  |
| Offeror’s approach to the engagement | | **0-30** |  |
|  | Comprehensive methodology  Inclusive approach to gather multiple perspectives  Seeks to understand and support the team and organization  Works in partnership with project team  Leverages knowledge and experience from work with similar organizations  Collaborates with key leadership to achieve the desired outcomes |  |  |
|  | Realistic timetable |  |  |
|  | |  |  |
| Price | | **0-20** |  |
|  | |  |  |
| Total points | | ***0-100*** |  |

Thank you for your RFP!

Do you know Wipfli offers more than just this requested service? Wipfli provides products and services specifically for nonprofit organizations. Our specialists are ready to help your organization with:

Audit and tax

Keep your budget and finances balanced

Outsourced services

Finance and technology experience by your side, but not on your payroll

Online subscription services

Stay up to date on important compliance changes and get access to our specialists

Consulting

Consulting in HR, IT, leadership and operations

Tools to keep you compliant

Policy and procedure manuals you can customize for your organization

Training

More than 120 topics available through on-site, webinar and on-demand training

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