

# Request for Proposal Management and Operation

**RFP submittal deadline:**

**May 18, 2018 3:00 p.m.**

**Contract Administrator:**

**Lee Bussell**

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# About EngenuitySC

EngenuitySC is a nonprofit focused on long-term competitiveness and prosperity in the Columbia region. Specializing in managing collaborations between business, government, education and community leaders, EngenuitySC has supported competitiveness initiatives in the Midlands since 2003.

## Why do we exist?

EngenuitySC exists to help local leaders build a more prosperous and competitive region.

## What do we do?

We provide collaboration and project management services for an array of initiatives that make our region more competitive. This includes industry cluster activation and management and education programs, among others.

## What distinguishes EngenuitySC?

- We manage complex projects using an entrepreneurial approach that produces BOLD results.
- We are well-connected collaboration managers working behind the scenes to build an attractive live, work, play environment.
- We are innovative thinkers focused on long-term prosperity and inspiring regional pride.

## EngenuitySC Core Values

- Comfortable in a dynamic, entrepreneurial environment
- Results driven
- Selfless
- Collaborative
- Bold
- Belief in the potential of the region

## Our Board Members

- Councilman Paul Livingston, *Chair & Executive Committee* - Richland County Council
- Lee Bussell, *Chair-Elect & Executive Committee* - Chernoff Newman
- Steve Hall, *Past Chair & Executive Committee* - Ovation Partners, LLC
- Mayor Steve Benjamin, *Founding Co-Chair* - The City of Columbia
- Dr. Harris Pastides, *Founding Co-Chair* - The University of South Carolina
- Dr. Keith Shah - Palmetto Health
- Councilwoman Debbie Summers - Lexington County Council
- Councilwoman Tameika Isaac Devine - Columbia City Council
- Chairwoman Cheryl Harris - Richland School District One
- Scott Graves - BlueCross BlueShield of SC
- Bill & Lou Kennedy - Nephron Pharmaceuticals
- Bill Kirkland - The University of South Carolina
- Lasenta Lewis-Ellis - LLE Construction, LLC
- John Lumpkin
- Ted Nissen - First Community Bank
- Mayor Elise Partin - City of Cayce
- Dr. Ron Rhames - Midlands Technical College
- Chairwoman Joyce Dickerson - Richland County Council

# Information to be Submitted

These instructions outline the guidelines governing the format and content of the proposal and the approach to be used in its development and presentation. The intent of the RFP is to encourage responses that clearly communicate the Proposer's understanding of EngenuitySC's requirements and its approach to successfully provide project management services on time and within budget. Only that information which is essential to an understanding and evaluation of the proposal should be submitted. Items not specifically and explicitly related to the RFP and proposal, e.g. brochures, marketing material, etc. will not be considered.

All proposals should assume a three (3) year contract period with an option for up to two, one-year extensions and shall address the following items in the order listed below:

- Section 1 – Proposal Summary Letter
  - This Section shall discuss the highlights, key features and distinguishing points of the Proposal. A separate sheet shall include a list of individuals and contacts for this Proposal and how to communicate with them. Limit this Section to a total of two (2) pages.
- Section 2 – Profile on the Proposing Firm(s)
  - This Section shall include a brief description of the Proposer's years in business, billings, number of employees, core values, and operating approach. Include any other firms participating in the Proposal.
- Section 3 – Qualifications of the Proposing Firm(s)
  - This Section shall include a brief description of the Proposer's and any subProposer's qualifications and previous experience on similar or related projects. If the Proposer is partnering with subProposer(s), the Firms should provide examples of previous experience working together on relevant projects or activities. Proposer should provide a sample list of past and present clients in a table format and short include descriptions, as appropriate, of pertinent project experience with other public/private partnerships. Also, include any areas of relevant specialization or certification, including but not limited to:
    - Examples of specific experience with collaboration management.
    - Examples of experience with education-oriented partnerships.
- Section 4 – Work Plan or Proposal
  - This Section shall present a well-conceived service plan. Succinctly describe the proposed approach in a 3-year, 12-month and 90-day outline for addressing the required services.
- Section 5 – Project Staffing
  - This Section shall discuss how the Proposer proposes to staff this project. Key project team members shall be identified by name, title and specific responsibilities on the project.
- Section 6 – Proposal Costs Sheet and Rates
  - The fee information is relevant to a determination of whether the fee is fair and reasonable in light of the services to be provided. Consultant shall provide the following information:
    - Direct labor rates for proposed staff
    - Subconsultant billing rates
    - Monthly price

# Scope of Work

The Selected Firm will be expected to provide administrative, financial and project management resources to meet the needs of the following projects and initiatives under the banner of EngenuitySC.

Project	ESC General	MRCR + Competitiveness Week	RCDS1 Cluster + Signature Programs	TEDxUSC	Do Good Columbia
<b>Mission of Project</b>	Management of the operations, business development, administration, finances, etc of EngenuitySC (ESC).	This project includes ESC's principal annual deliverable - the Midlands Regional Competitiveness Report - coupled with our annual Competitiveness Week. This weeklong series of events and conversations - some coordinated by EngenuitySC and some held by outside partners - brings attention to the organizations, people and ideas that are creating a more competitive and prosperous Midlands.	<b>Cluster Program:</b> Launched in 2013 to educate students, teachers, and parents on the importance of STEAM education and expose them to career opportunities available in the Midlands by showing them what success looks like. Schools include Lower Richland, Hopkins, Southeast Middle Schools and Gadsden. <b>Signature Program:</b> Launched in 2018 to bring two of our signature high school programs - Entrepreneurship Bootcamp and Dress to Impress - to students at CA Johnson, Eau Claire and Columbia.	In the spirit of TED's mission, "ideas worth spreading," the TEDx program helps communities, organizations and individuals produce TED-style events at the local level. TEDx events are planned and coordinated independently, on a community-by-community basis, under a free license from TED. This TEDx project is produced by USC, and EngenuitySC is providing project management support.	Do Good Columbia is an immersive problem solving weekend led by Richland Library with a goal to solve issues facing the Columbia, S.C., community. ESC is serving as the project management team for the winning idea from Do Good Columbia 2017 to revitalize Riverfront Park. Both parties are focused on activating the amphitheater space, the Turbine House, and the grassy area behind the amphitheater.
<b>Estimated Total FY19 Budget</b> <b>*Subject to Change*</b>	\$385,000	\$50,000	\$550,000	\$25,000	\$50,000
<b>Estimated Not-to-Exceed Firm Budget</b> <b>*Subject to Change*</b>	\$220,000	\$15,000	\$175,000	\$24,000	\$20,000

<b>Project</b>	<b>iTs SC</b>	<b>What's Next Midlands</b>	<b>Midlands Mayors Forum</b>	<b>MBLG Regional Competitiveness Initiative</b>	<b>COR</b>
<b>Mission of Project</b>	iTs SC - Columbia's Insurance Technology and Services cluster - is focused on establishing purposeful partnerships, creating a competitive advantage and leveraging regional expertise. These are collaborative, passionate leaders from industry, education and economic development working to make Columbia the nation's top destination for insurance and technology. ESC serves as their project and administrative management partner.	What's Next Midlands is a social-investor driven funding opportunity for individuals and organizations implementing projects that make our community more interesting, welcoming, and fun.	Midlands Mayors Group - In partnership with the City of Columbia, EngenuitySC is working with this 25+ mayor group to provide project management support for their bi-monthly meetings.	The Midlands Business Leadership Group (MBLG) is leading a collaborative effort focused on enhancing regional competitiveness, prosperity and growth in the Midlands. Using MRCR as one of multiple tools to chart a path and measure success, MBLG, with support from EngenuitySC, is bringing partners together to identify the regional challenges, prioritize the biggest opportunities, define the gaps, and catalyze action.	COR is a volunteer-driven organization with three focus areas: leadership, service and connectivity. They fulfill their mission by connecting members with mentors, leaders and developments in our region; by providing and promoting volunteer opportunities; and by promoting Columbia to Columbians. ESC is providing project management support for their administrative, database management, and marketing functions with the hope of an expanded relationship in the future.
<b>Estimated Total FY19 Budget *Subject to Change*</b>	\$94,000	\$15,000	\$15,000	\$55,000	\$45,000
<b>Estimated Not-to-Exceed Firm Budget *Subject to Change</b>	\$60,000	\$6,000	\$10,000	\$40,000	\$42,000

# Summary of Duties

The contract period for this RFP will extend for three (3) fiscal years, from July 1, 2018 through June 30, 2021 with an option for up to two, one-year extensions.

The Selected Firm and any subcontractors will be expected to provide staff capacity and expertise to fulfill the following duties:

- Executive Director
- Oversight of Government Relations Engagement and Contractor Management
- Lead, Manage and Hold Accountable the Project Management Team and Objectives
- Fundraising
- Financial Management
- New Program Development
- Collaboration Management
- Project Management for all programs and initiatives
- Industry Cluster Activation and Management
- Regional Marketing, Research and Data Collection
- Community and Local Government Relationship Development
- Marketing and Communications Management
- Special Event Management
- Administrative

The Selected Firm will undertake activities to accomplish goals initially aligned with the FY19 Action Plan for EngenuitySC - provided above. Additional activities may be assigned by the Board of Directors during the term of the Agreement. Such work will include initiating and coordinating communications and work-product among the Board of Directors, Executive Committee, Mission and Projects Committee, Finance Committee, outside consultants, and other involved parties to attain such goals. The Firm will manage all day-to-day affairs of EngenuitySC in cooperation with the Executive Committee and as approved by the Board of Directors.

The Selected Firm will be responsible for managing and (where possible) completing the following specific activities:

- Protecting and promoting the organizational mission of enhancing regional collaboration and prosperity
- Managing regional collaborations among business, government, education and community leaders
- Managing and implementing the specific and ongoing activities within EngenuitySC service areas:
  - Collaboration Management Services
  - Project Management Services
  - Regional Research, Marketing and Analysis
  - New Cluster Activation and Management
- Managing activities outlined in the adopted EngenuitySC FY19 Action Plan (Firm should prepare for the FY20 and FY21 scopes of work to look similar, but understand that they are subject to change);
- Prioritizing regional initiatives through the Mission and Projects Committee, Board of Directors and others;
- Providing project definition and management support for EngenuitySC initiatives;
- Managing EngenuitySC community relations, marketing and public relations efforts;

- Managing and communicating key regional competitiveness metrics;
- Managing and prioritizing government affairs items that are critical to EngenuitySC's mission;
- Pursuing grants approved by the Board of Directors;
- Managing day-to-day financial affairs as called for in the budget;
- Raising money from both the public and private sectors to fully support the budget;
- Prior to the end of the current fiscal year, prepare a comprehensive Annual Report to include a proposed budget for the following year for Board of Directors' review and approval;
- Working with all contractors and grantors - including, but not limited to, RCSD1, Laurens 56 (RCSD2 Fiscal Agent), MBLG, COR, University of South Carolina Office of Communications, Richland Library, iTs|SC - in executing the agreed upon statements of work/MOU;
- Working with all public sector entities - including, but not limited to, USC OEE, City of Columbia - in executing the agreed upon statements of work/MOU's;
- Organizing regular meetings of the Board of Directors and Committees for organizational and informational purposes, and;
- Other activities assigned by the Board of Directors, the Executive Committee, the Mission and Project Review Committee and/or the Finance Committee.

Finally, the Selected Firm is required to occupy and operate out of the current EngenuitySC space at 1000 Catawba Street, Suite 130 until November 30, 2020.

## Compensation

The Selected Firm will be paid based on approved budgeted rates to be billed against projects on a monthly basis. Such fees will include the cost of all professionals and subcontractors, as well as administrative staff support, unless identified as separate consultant/contractor. Professional fees include salaries, bonuses, unemployment compensation, FICA, long term disability, retirement, life and medical insurance.

The Selected Firm and its professionals will provide status reports in the EngenuitySC Board of Directors meetings detailing its work activities and accomplishments on behalf of EngenuitySC.

The Selected Firm will have the right to, if necessary, enter into good faith negotiations with EngenuitySC to revise the monthly amount paid for professional services. In certain cases, outside organizations may want to hire EngenuitySC to provide management services for special projects. These projects will be reviewed by the Mission and Project Committee on an individual basis and the Selected Firm may be eligible for additional compensation on a "per project" basis.

In addition to professional fees, the Selected Firm shall be reimbursed for its out-of-pocket expenses reasonably incurred in connection with the performance of its work and which are included in the approved budget for EngenuitySC.

The Selected Firm will submit an invoice to EngenuitySC at the first of each month for that month's professional fees and the preceding month's out-of-pocket expenses. Invoices will be due and payable upon receipt.

# Proposed Timeline

Benchmark	Timeline
Submission Deadline	May 18, 2018 at 3:00 p.m.
A Selection Committee comprised of EngenuitySC Executive Committee members will select a “short-list” of up to two (2) most qualified firms (Finalists).	May 24, 2018
Interviews with finalists	May 28 - June 1, 2018
Notification of final decision	June 4 - June 8, 2018
Contract negotiation	June 11 - June 15, 2018
Final contract approval	June 21, 2018
Contract Duration	July 1, 2018 - June 30, 2021

1. Please submit all proposals via email to Lee Bussell at [Lee.Bussell@chernoffnewman.com](mailto:Lee.Bussell@chernoffnewman.com) by 3:00 p.m. on Friday, May 18.
2. EngenuitySC reserves the right to discontinue or delay the selection process at any time. A consultant may or may not be hired as a result of this RFP.
3. All questions should be submitted via email to [Lee.Bussell@chernoffnewman.com](mailto:Lee.Bussell@chernoffnewman.com). EngenuitySC will provide a written response to all questions and send this information out to everyone who responds to the RFP.
4. EngenuitySC will not reimburse any costs incurred by Proposing Firms in preparing proposals.
5. You can learn more information about EngenuitySC at [www.engenuitysc.com](http://www.engenuitysc.com).

# Proposal Evaluation Criteria

Proposals will be evaluated on the following criteria and weighted points:

- Criteria Weighted Points
  - Qualifications, Capacity & Experience 60
  - Work Plan 20
  - Cost 20
  - **TOTAL 100**