



**REQUEST FOR PROPOSALS**

**ORGANIZATION CONSULTATION,  
FACILITATION,  
AND TRAINING SERVICES**

The Centre  
for  
Organization Effectiveness

## **Introduction and Background**

The Centre for Organization Effectiveness, a California Joint Powers Authority created by the City of San Diego and the San Diego Water Authority, is updating its list of interested and qualified consultants to be used on an as-needed basis to provide organization consulting, facilitation, and training services to public, non-profit, and private organizations. An as-needed list of consultants will be developed from responses to this Request for Proposals (RFP). The as-needed list developed will be an open list, and consultants can ask to be removed from the list at any time. As specific projects develop, the list will be the source from which candidates are chosen, generally by client interviews with several consultants from the list.

The mission of The Centre is to fulfill the leadership development needs of public, non-profit, and private sector organizations by raising the caliber of leadership through various educational and training programs, forums, and organization development interventions. Specific projects requiring consultants are administered through The Centre. This Request for Proposals is intended to develop partnerships with external consultants to offer these services to Centre client organizations. For more information about The Centre, please visit our website at [www.tcfoe.com](http://www.tcfoe.com).

## **Scope of Services**

The Centre will be seeking to enlist consultants for a variety of assignments. Potential projects include work involving the following consultation/facilitation/training skills:

- Executive Training
- Management Training
- Supervisory Training
- Technical Training
- Facilitation of Centre academies, workshops, and/or forums
- Design and Implementation of large scale change efforts
- Teambuilding
- Strategic Planning
- Coaching Leader at Various Levels
- Group Dynamics
- Survey/Assessment Design and Analysis
- Reorganization/Restructuring
- Diversity Education
- Productivity Assessment

Experience in every area in not expected or required.

## **Proposal Requirements**

Proposers shall provide a clear, concise response to this Request for Proposals. In the event of multiple principals per firm, information on each consultant wishing to perform work must be included. In the event of joint proposals between two or more firms, indicate the role that each sub-consultant or co-proposer would perform. The Centre reserves the right to select or choose between principals, co-proposers and sub-consultants. The majority of The Centre's clients are public sector agencies, and consultant experience in the public sector, while not required, is highly desirable.

**Please use the following outline when completing your proposal:**

1) Qualifications

- A. Highlights of previous consultation/facilitation/training experience of the firm including public and private sector clients (maximum of one page)
- B. A brief resume for each individual, listing qualifications (including educational accomplishments and memberships to organizations)
- C. Response to the attached Areas of Expertise Table (see Attachment A). Attachment A is also included in a Word format, so you can complete the responses in the original document.

2) Client References

Consultants should include the name, address, telephone number, and email address of three to five clients, public as well as private sector, for which services similar to those described in this Request for Proposals have been performed.

3) Fees for Services

Consultants should provide a typical hourly consulting fee. Please note fees will be negotiated on an individual project basis taking into consideration the scope of the project, the client organizations' fiscal constraints, and the consultant's compensation requirements.

## **Proposal Submission Requirements**

The completed proposal must be submitted via e-mail only to:

Sommer Kehrli, Ph.D.  
Executive Director  
[skehrli@tcfoe.com](mailto:skehrli@tcfoe.com)

**Note: Facsimile copies will not be accepted.**

## **Evaluation of Proposals and Consultants**

Consultants must initially be represented by their written proposals. Based on the response to this Request for Proposals, The Centre may choose to interview consultants before compiling the as-needed list or awarding a project. The Centre may request to observe consultants presenting a program in an educational/training setting prior to inclusion on the as-needed list or award of a specific assignment.

***This Request for Proposals and/or inclusion on the as-needed list are not a guarantee of work.***

## **Special Conditions**

### I. Insurance

The following insurance coverage is requested for purposes of responding to this Request for Proposals:

- General liability insurance

The Centre reserves the right to require liability insurance and additional automobile coverage for any consultant chosen from the as-needed list for a specific project. The amount of coverage will be determined on an individual project basis depending upon the scope of work for the project and the associated level of risk or exposure.

### II. Drug-Free Workplace Policy

All Centre projects are subject to City of San Diego Council Policy No. 100-17, Drug-Free Workplaces. This policy requires that all City construction Contractors, consultants, grantees, and providers of non-professional services provide a drug-free workplace in accordance with the provisions contained therein.

The Drug-Free Workplace Policy is available online at [www.sandiego.gov/purchasing](http://www.sandiego.gov/purchasing) or via request from the Purchasing Division by calling (619) 236-6000.

By signing and/or authorizing the bid submittal, the Bidder/Proposer acknowledges that they have read and understood the meaning, intent, and requirements of said policy; acknowledge said policy is incorporated as part of this bid/proposal; certify that they have a drug-free workplace program in place that complies with said policy; and that Subcontractor agreements for this bid/proposal contain language which indicates the Subcontractor's agreement to comply with this policy.

### III. Americans with Disabilities Act

Every person or organization awarded a contract, lease, or grant by the City of San Diego acknowledges and agrees that they are aware of and will comply with Council Policy 100-04, adopted by Resolution No. 282153 relating to the federally mandated Americans with Disabilities Act (ADA). Contractors and Subcontractors will be individually responsible for their own ADA program.

### IV. Equal Employment Opportunity

Contractor shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Contractor shall provide equal opportunity in all employment practices. Contractor shall also ensure that their Subcontractors comply with the City's Equal Employment Opportunity Program. Contractor agrees to be bound by the City Of San Diego Equal Opportunity Ordinance (Municipal Code Chapter II, Article 2, Division 27).

For questions regarding the City's Equal Employment Opportunity Program, contact the Equal Opportunity Contracting Office at (619) 235-5785.

### V. Nondiscrimination in Contracting

Contractor shall not discriminate on the basis of race, gender, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring or treatment of Subcontractors, Vendors or Suppliers. Contractor shall provide equal opportunity for Subcontractors to participate in subcontracting opportunities. Contractor understands and agrees that violation of this clause shall be considered a material breach of the contract and may result in contract termination, debarment, or other sanctions. This language shall also be included in construction contracts between the Contractor and any Subcontractors, Vendors, and Suppliers.

As part of its bid proposal, Bidder shall provide to The Centre a list of all instances within the past ten (10) years where a complaint was filed or pending against Bidder in a legal or administrative proceeding alleging that Bidder discriminated against its employees, Subcontractors, Vendors, or Suppliers, and a description of the status or resolution of that complaint, including any remedial action taken.

Upon The Centre's request, Contractor agrees to provide to The Centre, within sixty (60) calendar days, a truthful and complete list of names of all Subcontractors, Vendors, and Suppliers that Contractor has used in the past five (5) years on any of its contracts that were undertaken within San Diego County, including the total dollar amount paid by Contractor for each subcontract or supply contract. Contractor further agrees to fully cooperate in any investigation conducted by The Centre pursuant to the City's Nondiscrimination in Contracting Ordinance (Municipal Code Sections 22.3401 - 22.3417). Contractor understands and agrees that violation of this clause shall be considered a material breach of the contract and may result in remedies being ordered against the Contractor up to and including contract termination, debarment, and other sanctions for violation of the provisions of the Nondiscrimination in Contracting Ordinance. Contractor further understands and agrees that the procedures, remedies, and sanctions provided for in the Nondiscrimination Ordinance apply only to violations of said Nondiscrimination Ordinance.

For questions regarding the City's Nondiscrimination in Contracting Ordinance, contact the Equal Opportunity Contracting Office at (619) 235-5785.

### **Rights and Responsibilities**

This Request for Proposals does not commit The Centre for Organization Effectiveness to award a contract, to pay any cost incurred in the preparation of a proposal, or to procure or contract for services or supplies. The Centre reserves the right to accept or reject any or all proposals received in response to this request, to negotiate with any qualified source, or cancel in whole or in part this Request for Proposals if it is in the best interest of The Centre to do so. Subsequent to contract negotiations, prospective contractors may be required to submit revisions to their proposals.

The Centre for Organization Effectiveness is an equal opportunity employer and does not discriminate based on race, color, sex, creed, religion, national origin, age, marital status, ancestry, disability, or sexual orientation.

## **Conflict of Interest**

Consultants are subject to all federal, state, and local conflict of interest laws, regulations and policies applicable to public contracts and procurement practices, including but not limited to California Government Code Sections 1090, et. Seq. and 81000, et. Seq. The Centre for Organization Effectiveness may determine that Consultants are subject to a conflict of interest code and are required to complete one or more statements of economic interest disclosing relevant financial interests.

This information will be made available in alternative formats upon request.

If you have any questions regarding this Request for Proposals, please contact Stephanie Seaman, at (858) 534-9141.

Sincerely,

Sommer Kehrli, Ph.D.  
Executive Director

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

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

Email/Telephone: \_\_\_\_\_

## Attachment A Areas of Expertise

Please rate yourself in the following areas to demonstrate your areas of expertise/experience by placing a mark in the appropriate box. Please see the working knowledge definitions below.

Area of Expertise	Expert	Good	Average	Not an Area of Expertise
Executive Training				
Management Training				
Supervisory Training				
Technical Training				
Facilitation of Workshops				
Design and Implementation of Large Scale Change Efforts				
Teambuilding				
Strategic Planning				
Coaching Leaders				
Group Dynamics				
Survey/Assessment Design				
Data Analysis				
Reorganization/Restructuring				
Diversity Education				
Productivity Assessment				
Grant Writing				
Grant Evaluating				
Business Process Improvement				
<b>Other Training Skills:</b>				
Instructional Design				
Board Development				
On-line learning				
Feel free to fill in other skill areas!				
Feel free to fill in other skill areas!				

**Please list training topic areas you are comfortable presenting currently:**

\*Working Knowledge Expertise definitions:

Expert: At least five years of experience and varied clients.

Good: At least three years of experience and varied clients.

Average: Less than three years of experience.

Not an area of expertise: Not skilled in this area.