



**Henderson County Government**  
**Request for Proposals to Create a Strategic Plan for the**  
**Utilization of Opioid Settlement Funds**

**Date of Issue: October 12, 2022**

**Proposal Due Date: October 26, 2022, at 1:00PM EST**

**Direct all inquiries concerning this RFP to:**

**Doug Guffey**

**Purchasing Agency**

**Phone: 828-694-5023**

**Email: [dguffey@hendersoncountync.gov](mailto:dguffey@hendersoncountync.gov)**

**Sealed, Hard Copy Responses ONLY will be accepted for this solicitation.**

### ***Bidders Checklist***

- Be aware of the proposal due date and time as indicated on the first page of this proposal.
- You must submit **sealed bids in hard copy format**. Ensure your bid is properly addressed.
- All signatures must be by a company officer or agent who is authorized to enter into contracts and sign bid documents.
- Have you read and understood the “Terms and Conditions” and the “Instructions to Bidders” for submitting a bid?
- Have you read and do you completely understand all the specifications of this bid proposal?
- Have you submitted the requested number of copies of your proposal and included all the requested literature and specifications?
- If an addendum to the specifications was issued, has it been signed and returned with this bid proposal?
- Have you included executed copies of the attachments?

## **Section 1: Purpose and Background**

Henderson County, North Carolina is seeking proposals from qualified individuals and organizations to facilitate a strategic planning process as it relates to community interventions for substance use that is grounded in the principles of equality and fairness and is fiscally sustainable. The outcome of this process will be a strategic plan that presents a clear planning process and approach, relevant data and analysis of trends, identification of opportunities and strategies, a process to prioritize and focus County programs and services, and an implementation plan with performance measures that track progress on achieving the goals of the plan.

The successful proposer will have broad experience and knowledge in public sector strategic planning, plan implementation, and performance measurement. The successful proposer will also have knowledge of the roles, responsibilities, and authorities of county government and its programs and services as well as the roles and responsibilities of the Board of County Commissioners. Further, the successful individual or organization will have a thorough understanding of the legislative, governmental, administrative, financial, programmatic, and support functions of county government. The successful proposer will possess excellent facilitation, consensus building and communication skills. Individuals or organizations responding to this solicitation will be expected to provide solid references and examples of strategic plans created for other public sector entities.

Proposals shall be submitted in accordance with the terms and conditions of this RFP and any addenda issued hereto.

## **Section 2: General Information**

### **2.1 Notice to Consultants**

It shall be the Consultant's responsibility to read the Instructions, Henderson County's terms and conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Consultants also are responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Consultants have questions, issues, or exceptions regarding any term, condition, or other component within this RFP, those must be submitted as questions in accordance with the instructions in Section 2.3 Proposal Questions. If Henderson County determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum.

### **2.2 RFP Schedule**

Listed below are the dates and times by which stated actions must be taken or completed. The County may determine, in its sole discretion, that it is necessary to change any of these dates and times. Should changes be required, proper notice will be provided to potential bidders. All listed times are Eastern standard times.

<b>Action</b>	<b>Time</b>	<b>Date</b>
Bid issued	5:00 PM	October 12, 2022
Deadline for Questions	5:00 PM	October 18, 2022
County Responses	5:00 PM	October 19, 2022
Bid Due	1:00 PM	October 26, 2022

### **2.3 Proposal Questions**

Upon review of the RFP documents, consultants may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the proposal questions process, consultants shall submit any such questions by the deadline for questions indicated in Section 2.2: RFP Schedule.

Questions shall be written and shall be emailed to [dguffey@hendersoncountync.gov](mailto:dguffey@hendersoncountync.gov) by the date and time specified above. Consultants should enter "RFP-Strategic Plan for Opioid Settlement" as the subject for the email. Questions submitted should include a reference to the applicable RFP section.

Questions received by the deadline date, Henderson County's response, and any additional terms deemed necessary by the County will be posted in the form of an addendum to the Henderson County website <https://www.hendersoncountync.gov/rfps> and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any Henderson County personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Consultants shall rely only on written material contained in an Addendum to this RFP.

### **2.4 Proposal Submittal**

#### **2.4.1 SUBMIT SEALED PROPOSALS, by October 26, 2022 by 1:00 PM EST**

2.4.2 Provide (2) complete sets of your bid per Section 2.5: Proposal Requirements in hard copy paper format (on 8-1/2" x 11" size paper, printed one side, only bound with a single staple in the upper left corner or with a single removable clip (no 3-ring binders) and must be SEALED in an envelope. **NO EMAILED OR FAXED BIDS WILL BE ACCEPTED.**

2.4.3 All bids must be mailed or delivered as follows in enough time to ensure receipt by the Purchasing Agent for this purpose on or before the time and date specified on the Bid Proposal Form. Bids not received by the time and date specified on the Bid Proposal Form will not be opened or considered. Vendor's whose submissions are received after the deadline will be allowed to pick-up or can arrange for return of their submission. Henderson County will bear no responsibility or expense associated with the return of materials.

#### **Mailing & Delivery Address:**

ATTN: Henderson County: RFP for Strategic Plan for Opioid Settlement  
Finance Department  
113 N Main Street  
Hendersonville, NC 28792

2.4.4 Any costs associated with the preparation and delivery of a submission related to this proposal will be borne solely by the vendor.

2.4.5 Submittals are neither a contractual offer nor a commitment to purchase services. The County assumes no contractual obligation because of the issuance of this RFP.

## 2.5 Proposal Requirements

Consultants shall populate all attachments of this RFP that require the Consultant to provide information and include an authorized signature where requested. Consultant RFP responses shall include the following items and those attachments should be arranged in the following order:

- 2.5.1 Cover Letter (Identify Project Manager)
- 2.5.2 A written narrative response to address the Project Organization
- 2.5.3 A written narrative response to address the Technical Approach
- 2.5.4 Consultant Experience and Qualifications as it relates to the scope of services and project deliverables

The consultant shall provide information on its experience and qualifications, which enable it to provide a suitable solution described herein, including, but not limited to the following:

- Brief history of the company
- Timeline of incorporation, ownership, parent company, partners and suppliers
- Financial viability of vendor
- Examples of experience in grant compliance
- Any other information regarding the vendor's experience, which will assist the County in evaluating the proposal and making an ultimate decision.

- 2.5.5 Consultant's capability and capacity to perform project

The vendor shall provide an example of a comprehensive project implementation plan. This plan should include:

- Project management and support personnel, with a brief description of each person's qualifications and experience
- Project timeline for each phase of the project
- Provide experience, qualifications, and role for each person who will be participating in the project. State the background of each team member, years of experience, length of employment with your firm, and experience providing the deliverables as described herein
- Include a list of relevant and successfully completed projects by these team members.
- Provide the name of the person who will direct the overall project throughout the duration of the contract and key responsibilities. Please include any subcontractors
- Include an organizational chart for the proposed project team, identifying the team leader, and all roles and areas of responsibility.
- Please note a personnel change **CANNOT** be made on the project team without prior written notice and approval by Henderson County.

2.5.6 Consultant's references

The consultant must supply three (3) references for similar work it has undertaken over the past three (3) years, preferably with a unit of local government. This shall include one reference that involves the use of grant funds.

Please provide:

- Entity name.
- Contact name(s).
- Email address.
- Telephone number.
- Brief description of the work performed, including products provided and date of installation.

Henderson County may contact these users to determine if the services provided are substantially similar in scope to those proposed herein and Consultant's performance has been satisfactory. The information obtained may be considered in the evaluation of the proposal.

2.5.7 Total cost for the proposed services and a cost for each work element or project phase

2.5.8 Executed copies of any addenda.

2.5.9 Attachment I: Vendor Information Form

**Section 3: Method of Award and Proposal Evaluation Process**

**3.1 Method of Award**

The method of award will be based on the most advantageous proposal as defined by the County considering price, technical merit, and past performance as defined by Section 3.4: Selection Criteria.

The County reserves the right to reject any or all proposals, waive technicalities and to be the sole judge of suitability of the services for its intended use as allowed by law and further specifically reserves the right to make the award in the best interest of the County.

**3.2 Public Record**

Proposals submitted shall not become public record until a contract is awarded by the Henderson County Board of Commissioners.

**3.3 Proposal Evaluation Process**

Henderson County shall review all Consultant responses to this RFP to confirm that they meet the specifications and requirements of the RFP.

Proposals will generally be evaluated according to completeness, content, and experience with similar projects, ability of the Consultant and its staff, and cost. Specific evaluation criteria are listed in 3.4 Evaluation Criteria, below.

Proposals submitted by the deadline will be evaluated and ranked by a selection committee comprised of representatives of Henderson County. The selection committee may request additional clarifying information from any firm that submits a proposal. The selection committee will evaluate the responses, may interview the top-rated firms, and will make a recommendation to the Board of Commissioners as to the selection of the firm determined to be the most qualified for the project. Any requests for clarifying information and/or the determination to hold interviews of top-rated firms shall be at the sole discretion of the County.

**3.4 Evaluation Criteria**

Proposals shall be evaluated based upon the matrix below:

<b>Criteria</b>	<b>(a) Weight</b>	<b>(b) Score (1-5)</b>	<b>(a) X (b) Weighted Score</b>
Experience as it relates to the scope of services of the RFP project deliverables	20		
Technical approach to the project, proposed, tasks, and timeline to complete work	20		
Project organization	20		
Capability and Capacity to perform the project	20		
Total cost of proposed services	20		
Final Score			

Proposals will be evaluated using a standardized scoring system. Each criteria component will be assigned points ranging from 1 - 5 according to the extent to which the proposed system meets the stated requirements. The points will be assigned as follows:

- 5 points: Fully meets
- 4 points: Meets with minor gaps (no compromise required)
- 3 points: Meets with moderate gaps (some compromise required)
- 2 points: Partially meets with significant gaps (compromise required)
- 1 point: Does not meet

Cost will be calculated with a formula using a ratio method, in which the lowest cost receives the maximum points allowed and other proposals receive a percentage of the points available based on their cost relationship to the lowest. This is determined by applying the following formula:

$$\frac{\text{Lowest Cost}}{\text{Cost being evaluated}} \times \text{Maximum Points Available} = \text{Score}$$

The points for each criteria component will be multiplied by the percentage weight listed above and totaled.

## **Section 4: Scope of Services**

### **4.1 Scope of Services**

#### 4.1.1 Phase 1 Development of Strategic Plan

The consultant will assist the Board of Commissioners and County leadership in developing a comprehensive strategic plan for the usage of Opioid Settlement Funds. The Plan is intended to direct efforts and resources toward a clearly defined vision for the utilization of these funds using a strategic planning framework. The Plan will be data driven, grounded in the principles of equality, position the County to address the challenges of the future, and will be fiscally sustainable. The Plan will articulate a vision, mission, core values, priorities, goals and objectives, implementation plans, performance measures, and a procedure for Plan review and maintenance.

The County acknowledges that each Consultant may have a different perspective, approach, and model to develop a strategic planning document. The proposal should clearly discern the approach that will best enable the County to achieve its organizational goals. With that flexibility in mind, the scope of work should include but not necessarily be limited to the following elements:

- 4.1.1.1 A timeline and schedule for the project that identifies major milestones, opportunities for meaningful information sharing, and decision points.
- 4.1.1.2 Data on demographic, economic, social, and environmental factors and trends that are impacting or are expected to impact County residents, County government, and other institutions, programs, and services as it relates to the impacts of substance abuse.
- 4.1.1.3 A schedule and format to provide information and receive guidance from the Board of Commissioners that complies with North Carolina's Open Meeting Law. The proposal should include an estimated number of facilitated discussions with Board of Commissioners as well as County Management in order to accomplish the development of the desired strategic plan.
- 4.1.1.4 Engagement with County leadership and employees as stakeholders in the Plan and as subject matter experts in strategy, initiative development, and performance measurement.
- 4.1.1.5 A framework to align other Countywide plans connected to behavioral health, inclusive of mental health and substance abuse, for County departments including but not limited to law enforcement, emergency services, and the justice system.
- 4.1.1.6 A decision-making framework that helps the Board of Commissioners set priorities.



- 4.1.1.7 An effective, considered, innovative, and fiscally sustainable strategic plan document that prioritizes County initiatives and resources to achieve specific goals within a specific period of time.
- 4.1.1.8 Goals and objectives and/or initiatives that support the vision, mission, and values of the Plan.
- 4.1.1.9 An implementation plan that transforms conceptual goals into realistic, achievable targets.
- 4.1.1.10 Performance measures or key indicators and outcomes that will serve as the basis for measuring progress in Plan implementation.
- 4.1.1.11 Analyses of any potential partnerships that could be leveraged to advance the Plan more efficiently and effectively.
- 4.1.1.12 Tactics for effectively communicating the outcomes of the strategic planning process and for providing ongoing information on progress to improve transparency and accountability during Plan implementation.
- 4.1.1.13 A recommended process for periodic plan reviews, updates, and/or other plan maintenance in accordance with the North Carolina Opioid Settlement Memorandum of Understanding.
- 4.1.1.14 The following strategies shall be integrated within the plan:
  - Recovery Support Services
  - Early intervention/prevention
  - Evidence Based Addiction Treatment
  - Criminal Diversion Justice Programs

4.1.2 Phase 2: Bidding and Selection of Firms to Execute the Approved Strategic Plan Outreach

Once the strategic plan is approved by the Henderson County Board of Commissioners, the consultant shall draft and solicit bids, as necessary, that coincide with the goals of the strategic plan.

The scope of work for each bid will be dependent on the strategic plan. These factors shall be decided after the approval of the strategic plan by the Board of Commissioners and will be determined by County management and the project team.

**4.2 Task Deliverables**

4.2.1 Phase 1: Strategic Plan

The successful consultant will be required to attend a kickoff meeting with the Board of Commissioners and other key county personnel to understand the goals and purpose of the project, identify potential issues to resolve, gather financial, demographic, and

related documents and data, and develop a detailed timeline based on schedules of applicable personnel.

4.2.1.1 The successful consultant will engage the Board of Commissioners in facilitated discussions and work sessions as often as needed in order to achieve the required project scope.

4.2.1.2 The successful consultant will meet with a project management team as often as needed in order to achieve the required project scope within the project timeline.

4.2.1.3 The successful consultant will prepare a comprehensive strategic plan including a clear and concise executive summary of the plan.

4.2.1.4 A draft plan will be provided to the County electronically in Microsoft Word format. That draft will be presented to stakeholders for input and to the Board of Commissioners to receive input and direction prior to finalizing the plan.

4.2.1.5 The successful consultant will present the final plan to the Board of Commissioners and prepare and execute a communications plan to introduce the final strategic plan to key stakeholders and other jurisdictions as applicable.

4.2.1.6 The successful consultant shall be or have the ability to become a subject matter expert of the State of North Carolina Memorandum of Understanding (MOU) for Opioid Settlement Funds. All sections of the MOU shall be substantially complied with and integrated within the strategic plan.

#### 4.2.2 Phase 2: Bidding and Selection of Firms to Execute the Approved Strategic Plan

4.2.2.1 After the approval of the strategic plan, the successful consultant shall develop and solicit bids as directed by the Henderson County Board of Commissioners.

4.2.2.2 Successful consultant shall create bid documents with scopes of work that are inclusive of qualitative factors and cost that are a representation of the goals of the board approved strategic plan.

4.2.2.3 The bid documents shall be reviewed and approved by the project team and County management before any bidding is conducted.

4.2.2.4 Consultant shall advertise the bids at minimum in the following manner:

- County Website- This posting(s) may be coordinated with the County's Purchasing Agent
- Legal Advertisement in the local newspaper. This must occur a minimum of seven days before the bid opening.
- State Historically Underutilized Business Website: This posting(s) may be coordinated with the County's Purchasing Agent.

4.2.2.5 Successful consultant shall ensure that potential partnership vendors identified within the strategic planning process are notified of the bid opportunity.

4.2.2.6 A minimum of two weeks shall pass between the last advertisement publish date and the bid opening.

4.2.2.7 Successful consultant shall review the bids submitted with County management and the project team and make recommendations to the Board of Commissioners

4.2.2.8 The Board of Commissioners has the sole authority to award any contracts as a result of the bidding processes completed by the successful consultant.

## **Section 5: Requirements**

### **5.1 Pricing**

Proposal price shall constitute the total cost to Henderson County for complete performance in accordance with the requirements and specifications herein, including all applicable charges, handling, administrative and other similar fees. Consultant shall not invoice for any amounts not specifically allowed for in this RFP.

The consultant shall provide both a total cost to perform all work and a cost for specific project elements or phases to perform this work. The cost by project element or phase would be used as a basis to modify the scope of work and associated costs if deemed necessary by the County.

### **5.2 Henderson County Terms and Conditions**

Any proposal submitted to Henderson County shall be deemed to include all the Terms and Conditions shown in the document found online at

[https://www.hendersoncountync.gov/sites/default/files/fileattachments/henderson\\_county/page/42611/terms\\_and\\_conditions\\_02.23.2022.pdf](https://www.hendersoncountync.gov/sites/default/files/fileattachments/henderson_county/page/42611/terms_and_conditions_02.23.2022.pdf)

These Terms and Conditions, which refer to a “purchase order”, shall be deemed to be included in any agreement entered as a result of this RFP.

Any attempt by a proposed contracting party under the RFP to exclude any of these Terms and Conditions shall cause any Proposal made in response to this RFP to be deemed to be non-responsive (unless Henderson County has notified the firm that the funding source for the goods or work sought under this RFP is not federal funds, in which case those provisions under number 15 of the Terms and Conditions (and all subparts thereunder) may be excluded from a Proposal.

### **5.3 Funding Source**

This RFP is funded with money from the **Dogwood Health Trust** as well as the **State of North Carolina Opioid Settlement Funds**. All provisions within the memorandum of understanding (MOU) of the Opioid Settlement and the grant agreement with Dogwood Health Trust agreement are applicable. The most restrictive requirements between the two funding sources shall be followed.

### **5.4 Contract**

Once the most advantageous proposal has been selected and approved by the Henderson County Board of Commissioners the successful consultant shall provide to the County for execution, a contract inclusive of all terms, conditions, specifications, deliverables contained herein.

## Attachment I: Vendor Information Form

<b>Attachment I: Vendor Information Form</b>			
Company/Firm Name			
Mailing Address			
Contact Name		Contact Title	
Phone Number	Fax	Email	Website
Federal Tax ID Number		Unique Entity Identification Number (SAM.gov)	
Required Documentation		Internal Routing	
Completed IRS W-9 form dated within calendar year and signed by authorized personnel.		W9 Received	YES
Minority and Women Owned Business (MWBE) certification, if applicable.		MWBE Certification Received	YES      N/A
		Unique Entity Identification Number confirmed in SAM.gov	YES