



## Request for Proposal (RFP)

### **Subject Matter Expertise: Organizational Assessment**

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RFP Released: December 31, 2020

All subject matter inquiries submitted in writing no later than January 15, 2021  
Responses will be available to all applicants in the online portal by January 22, 2021

Intent to Bid Due: January 29, 2021

Proposals Due: February 11, 2021

#### Point of Contact

Subject Matter Content Inquiries: Lori Riti ([lriti@nachc.org](mailto:lriti@nachc.org))

Submission Process Inquiries: Latisha Harley ([lharley@nachc.org](mailto:lharley@nachc.org))

## **Organization Overview**

The [National Association of Community Health Centers](#) (NACHC) was founded in 1971 to “promote the provision of high quality, comprehensive and affordable health care that is coordinated, culturally and linguistically competent, and community directed for all medically underserved populations.”

NACHC:

- Serves as the national advocacy organization in support of community-based health centers and the expansion of health care access for the medically underserved and uninsured.
- Conducts research and analysis that informs both the public and private sectors about the work of health centers, their value to the American health care system and the overall health of the nation’s people and communities – both in terms of costs and health care outcomes.
- Provides training and technical assistance to support and strengthen health center operations, clinical quality, leadership development and governing Boards of Directors at health centers across the country.
- Develops partnerships with the public and private sectors to build stronger and healthier communities.
- Employs 100 staff members, located in Bethesda, Maryland and Alexandria, Virginia.

## **Purpose**

NACHC invites proposals to conduct an independent organizational assessment, as presented in the Scope of Work outlined herein.

The overarching purpose of this assessment is to assure that NACHC’s structure, infrastructure, policies, systems, and organizational culture are aligned with the needs of its members and position the organization to attain its defined strategic objectives into the future.

## **Time Period**

Time period for services is to be specified by the contractor, based on the methodologies employed to accomplish the Scope of Work. Work is expected to commence no later than March 22, 2021.

## **Scope of Work and Deliverables**

Given the current COVID-19 public health crisis, selected vendor must be able to perform the Scope of Work and provide deliverables by utilizing virtual methodologies.

In order to assure member and staff trust and support for organizational improvements, it is essential that this work be performed in a manner that protects the independence, objectivity, and integrity of the process and the work product. It is also essential to review and incorporate as appropriate previous and ongoing organizational development work including “NACHC of the Future” and the “Diversity, Equity, and Inclusion” (DEI) project.

At a minimum we expect the Scope of Work to address the following, and in all areas it is expected that actionable recommendations accompany the findings of the assessment.

**Organizational Structure/Infrastructure:**

- Conduct a detailed examination of the Association's structure, functions and process
- Assess organizational structure as it pertains to leadership's ability to realize the organizational vision
- Evaluate the extent to which NACHC's current organizational structure, staffing and assigned job responsibilities are appropriate and efficient
- Assess functional assignments and staffing levels required to support organizational priorities
- Assess interdepartmental communication, coordination, collaboration
- Make recommendation on staff training opportunities as related to functions
- Review succession and transition plans for NACHC senior leaders and make recommendations
- Assess current staff development and recommend actions management and HR can take to advance career ladders
- Make recommendations related to consistent policy implementation

**Organizational Effectiveness:**

- Review current organizational priorities
- Evaluate the degree to which effort and allocation of resources align with the stated organizational priorities
- Evaluate the degree to which 1) the NACHC Board is appropriately engaged in the development of NACHC policies; and 2) management utilizes such policies as a foundation for operating procedures.
- After review of NACHC corporate documents, make recommendations on opportunities to further engage membership at appropriate levels
- Evaluate effectiveness of current corporate communication strategies with the Board and stakeholders like PCAs, HCCNs, and Membership. Advise on potential re-engineering and streamlining models
- Review the internally-developed NACHC of the Future report through the staff lens, members lens, the Government's lens, and the healthcare marketplace. Use the March 2020 summary document to reaffirm the six focus areas identified
- Determine the degree to which NACHC is positioned to be proactive in the future world
- Evaluate the future roles of NTAPS, PCAs and HCCNs in the next five years as they relate to NACHC engagement. Recommend actions that can strengthen these relationships

**Organizational Culture:**

- Identify the factors that impact trust, engagement, direction, communication, and a supportive and effective environment within the organization
- Identify key drivers and greatest opportunities for perpetuating positive impact
- Evaluate what factors relate to nurturing talent and maximizing employee retention
- Evaluate the alignment of organizational culture to achieve the visions for the NACHC of the Future
- Review the Diversity, Equity and Inclusion Climate Assessment conducted by Gold Enterprises, LLC. and evaluate staff retention strategies as referenced in the report
- Evaluation organizational policies and supporting operating procedures, including internal controls, to assess compliance with operating procedures

## **Inquiry/Submission Process and Timeline**

Interested parties should submit questions regarding this consultancy to Lori Riti at [lriti@nachc.org](mailto:lriti@nachc.org) by 5:00 PM ET on **January 15, 2021** (Note: NACHC will not entertain questions otherwise). NACHC will post responses to all submitted questions on the NACHC RFP website (here) by 5:00 PM ET on **January 22, 2021**. Vendors who intend to submit a proposal must notify NACHC by emailing Lori Riti by 5:00 PM ET on **January 29, 2021**. Proposals must be submitted via NACHC's web-based portal by 11:59 pm PT by **February 11, 2021, (i.e., by 2:59 am ET on February 12, 2021)**. The system will notify you upon your successful submission into the portal. Incomplete proposals will not be considered.

After an initial evaluation using the criteria on page 5, NACHC will determine which, if any, applicants will be interviewed. If your proposal is top-rated, NACHC will schedule a 30-minute interview with vendor applicant to occur **March 4 – 5, 2021**. During the virtual interview, the selected applicants will be given the opportunity to discuss their proposal, qualifications, experience, fee, etc. Selected and non-selected candidates will be notified by or before **March 12, 2021**.

Online Submission Portal: [https://nachc.co1.qualtrics.com/jfe/form/SV\\_enXlvDCGIGZ92e1](https://nachc.co1.qualtrics.com/jfe/form/SV_enXlvDCGIGZ92e1)

Proposals must contain the below items, which are evaluated based on the specific criteria outlined in the Evaluation table below.

- **Point of Contact Information**
- **Name / Description of Organization**
- **Capability Statement**
- **Experience and Education**
- **Quality of Work Samples**
- **Daily and Hourly Rates**
- **Proposed Timeline**
- **Signed Statement** (see below)

## **ATTESTATION**

By my signature below, I hereby certify that this Proposal reflects my best estimate of the capability of organization and the true and necessary costs for the project, and the information provided herein is accurate, complete and current as of the date of my signature below.

I agree that my electronic signature is the legal equivalent of my manual signature on this application. By typing my name below, I certify that the information provided in the application is true and accurate.

**Print Name:**

**Title:**

**Organization:**

**Signature:**

**Date:**

## Evaluation Criteria

Complete proposals will be evaluated using the criteria below.

Rating Factor	Application Selection Criteria To earn full points the applicant must demonstrate:	Points
<b>Capability Statement</b>	<p>Capability statement that demonstrates you/your organization’s ability to deliver services in organizational assessment consultative services, including contact information for references.</p> <p>Such documentation should include synopses outlining the analytical process, timeframe, challenges, and outcomes from recent assessment engagements.</p> <p>Document your/your organization’s experience with and ability to deliver organizational assessment services specifically for a not-for-profit advocacy association.</p> <p>Page Limit for Capability Statement: 2 pages</p>	25
<b>Project Management Plan &amp; Timeline</b>	<p>The project management approach and timeline must include the following components:</p> <ul style="list-style-type: none"> <li>• The approach to produce and meet deliverables within time frame;</li> <li>• Incorporate appropriate expertise into project management responsibilities; and</li> <li>• Project timeline using milestones that demonstrate understanding of project needs and appropriate project management approaches.</li> </ul> <p>Page Limit for Project Management Plan &amp; Timeline: 5 pages</p>	25
<b>Hourly Rate, Budget Narrative &amp; Budget Justification</b>	<p><b>Hourly Rate</b> Reasonableness of proposed budget for project implementation, inclusive of preparation and delivery to client. Reasonableness is determined by NACHC’s non-profit status.</p> <ul style="list-style-type: none"> <li>• Hourly Rate should reflect overall cost rate inclusive of any fringe, overhead and/or general &amp; administrative expense (G&amp;A), if required. Please ensure costs are delineated as appropriate using the template categories.</li> <li>• No travel costs need to be submitted for this submission.</li> <li>• Flat fee is a fixed cost, or not to exceed amount.</li> </ul> <p><b>Budget Narrative</b> Provide the total engagement not-to-exceed budget itemized by major task including the hourly billing rate for each engagement staff member and the budgeted number of hours that each individual will contribute to major engagement tasks and the overall completion of the proposed scope of work.</p> <p>Provide an itemized budget for all other costs/ fees that will be charged in addition to professional hourly fees (e.g., report production/reproduction,</p>	20

	<p>travel, etc.).</p> <p><b>Budget Justification</b> Budget justification is reasonable for project implementation, inclusive of preparation and delivery to client.</p> <p>Page Limit of Budget Narrative and Justification: 3 pages</p>	
<b>Experience and Education</b>	<p>Resume(s)/CV(s) of key staff who will participate in conducting this engagement, including the organization of the engagement team.</p> <p>Document the tenure, relevant professional experience and education of each team member reflecting their knowledge and consultation specific to conducting organizational assessments.</p> <p>Page Limit for Resume(s)/CV(s): 2 pages per staff / expert</p>	15
<b>Reference Letters</b>	<p>Past client evaluations, reference letters, and/or testimonials demonstrating quantitative and/or qualitative feedback, preferably from clients in the not-for-profit association sector.</p> <p>Page Limit for Reference Letters: 3 letters of recommendation</p>	15
Total		100

## **Attachment I: NACHC Consultant Travel Policies and Procedures**

To help promote good stewardship and cost-efficiency we have included the following NACHC travel principles. They provide helpful guidance for booking air travel, making hotel arrangements, and securing ground transportation. Each vendor must be a responsible steward for NACHC's resources.

*Adherence to this policy is strictly required. NACHC cannot provide reimbursement for undocumented expenses.*

- We will reimburse coach air travel as far in advance as possible to take advantage of low-cost fares. We will only reimburse the coach rate.
- Do your own research for transportation and travel options on the internet. This includes hotels and car rentals.
- When making hotel reservations, look at all rate rules and options and choose accordingly. If possible, take advantage of discounts offered as bundles with air and car rental options.
- Consider purchasing the travel insurance (generally less than \$25.00 per occurrence) offered by airlines and hotels to mitigate penalties for trip changes or cancellations. This could be especially valuable if you book further ahead and realize your plans may need to change.
- Limit the use of car services (limo/town cars) for local meetings.
- Limit the use of car services (limo/town cars) for transportation to and from the airport. Affordable and cost-effective resources include:
  - Taxis – share taxis or Uber car share services with other staff members when possible
  - Shared airport shuttle services (e.g. Super Shuttle)
  - Hotel provided shuttles, where available
  - Public transportation
- Other reimbursable expenses include any business use of copying, messenger service, phone/ internet access, audio visual, supplies, shipping expenses, etc. as long as it is related to your scope of work and has been approved in advance.
- Meals incidental to business meetings must be preapproved include the participants and the business purpose and must include the itemized receipt. Under **no** circumstances is alcohol charge allowable.

## Reimbursement

No reimbursement for authorized expenses shall be made unless and until selected Vendor/Contractor provides NACHC with documentation of expenses as follows:

1. Include the original receipts for all travel expenses, including airline ticket receipts, taxi or shuttle receipts, hotel receipts, rental car or mileage (if using a personal car) receipts or documentation, and other miscellaneous receipts. Private automobile mileage is reimbursed at the current IRS rate based on beginning and ending odometer readings. Reimbursement for tolls and parking require a receipt.
  
2. If reimbursed by NACHC for travel time, the following applies for each one-way trip:
  - a. Traveling within the same time zone – the lesser of actual time or 4 hours;
  - b. Traveling within one to two time zones – the lesser of actual or 6 hours;
  - c. Traveling within three or more time zones – the lesser of actual or 8 hours.
  
3. Meals will be paid on a per diem basis:
  - a. If the trip begins before 12 noon, reimbursement is \$40/day.
  - b. If the trip begins after 12 noon, reimbursement is \$20 for that day.

Three hours prior to a flight or train departure is reasonable in determining your per diem amount.

4. Selected vendor/consultant must submit complete invoices for payment to NACHC within 30 days of service delivery.