



citycounty insurance services  
cisoregon.org

## Request for Proposals (RFP) Addendum

### Strategic Plan Consultant

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<b>RFP Schedule</b>	
Issuance of RFP:	<b>August 14, 2023</b>
Submission of Questions about the RFP:	<b>August 28, 2023, 5:00 p.m. (PT)</b>
Proposal Due:	<b>September 13, 2023, 5:00 p.m. (PT)</b>
Anticipated Contract Award:	<b>October 2023</b>

## ADDENDUM

### A. BACKGROUND

On August 14, 2023, CIS issued a Request for Proposals (RFP) to solicit offers from qualified firms assist CIS in developing a comprehensive 5-year strategic plan by facilitating a strategic planning process that involves relevant stakeholders consisting of CIS' Executive Team, Board of Trustees, CIS staff, and CIS members.

CIS is issuing this Addendum to the RFP to respond to written questions we received from potential proposers. The Addendum modifies the original RFP document only to the extent indicated. All other areas of the original RFP remain in effect and can only be modified in writing by CIS. This Addendum is made an integral part of the original RFP. It is the responsibility of all proposers to conform to this Addendum. Proposers who have already submitted proposals may either: 1. Submit an addendum to their proposal; or 2. withdraw the original proposal and submit a new one. Any addendum or revised proposal must be submitted no later than the **Proposal Due Date of 5:00 p.m. (PT) on September 13, 2023.**

### B. RESPONSES TO QUESTIONS

**Question 1: Under Item 3, "Evaluation Criteria, it listed "Local Staffing and Availability." Does this mean the firm must have a local presence to qualify? We are based in Colorado and would like to present a bid.**

**Response 1:** It isn't necessary for a firm to have staff based in Oregon, but the firm must be able to fulfill all elements of the Scope of Work in the RFP, which includes conducting several in-person meetings and workshops over the course of the strategic planning process.

**Question 2: Is there a budget or is there a not to exceed amount?**

**Response 2:** We have budgeted \$25,000 for this process, but price is just one factor in our selection. A successful bid may be higher than \$25,000 depending on the proposed services and value.

**Question 3: Whether companies from Outside USA can apply for this? (like, from India or Canada)**

**Response 3:** Firms from outside the United States can submit proposals, but the firm must be able to fulfill all elements of the Scope of Work in the RFP, which includes conducting several in-person meetings and workshops over the course of the strategic planning process.

**Question 4: Whether we need to come over there for meetings?**

**Response 4:** See the response to Question 3.

**Question 5: Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)**

**Response 5:** Tasks in the RFP's Scope of Work that do not require an in-person presence can be performed outside the United States. Any tasks that require an in-person presence such as the onsite meetings and workshops must be performed in-person at the designated location in Oregon. They cannot be conducted virtually through Zoom, Microsoft Teams or other virtual conferencing services.

**Question 6: Can we submit the proposals via email?**

**Response 6:** Yes, as described in Section III(D)(2) of the RFP, proposals must be submitted via email to the RFP Contact Person.

**Question 7: What are the specific evaluation criteria for the proposal?**

**Response 7:** The evaluation criteria for the RFP are described in Section III(D)(3) of the RFP document.

**Question 8: Are there any preferred or required methodologies for the strategic planning process?**

**Response 8:** There are no preferred or required methodologies for the strategic planning process beyond what is described in the RFP's Scope of Work. CIS is open to considering whatever methodologies a proposing firm may include in their proposal.

**Question 9: What is the budget range or constraints for this project?**

**Response 9:** See the response to Question 2.

**Question 10: Are there any specific reporting or documentation formats required?**

**Response 10:** As described in the RFP's Scope of Work, a detailed strategic plan document is a required work product from this process. The specific format of the document is up to the successful proposer, subject to CIS' approval.

**Question 11: What are the expectations for ongoing communication and collaboration with CIS during the project?**

**Response 11:** CIS expects the successful proposer to collaborate with CIS through the in-person meetings and workshops described in the RFP's Scope of Work as well as regular check-ins with CIS' Executive Director and Executive Team.

**Question 12: Are there any specific requirements for the online meetings, focus groups, or online surveys mentioned in the RFP?**

**Response 12:** CIS desires input on the strategic plan from our staff as well as our members. Given that staff and members are located throughout the state, we are open to engagement with them being conducted via a virtual conferencing service or online surveys. CIS is open to considering whatever methodologies a proposing firm may include in their proposal.

**Question 13: What are the expectations for knowledge transfer to CIS staff?**

**Response 13:** CIS expects the successful proposer to transfer knowledge to us through regular check-ins with our Executive Director and Executive Team as well as through the detailed strategic plan document required in the Scope of Work.

**Question 14: Are there any specific requirements or preferences for the in-person workshops, such as location, duration, or format?**

**Response 14:** CIS' expectations for in-person meetings and workshops are described in the RFP's Scope of Work.

**Question 15: What are the expectations for post-project support or follow-up?**

**Response 15:** CIS does not have specific expectations for post-project support or follow-up but may be willing to consider support such as an annual update of the strategic plan. As described in Section V(E)(Cost Schedule) of the RFP, any proposals for post-project work should be listed separately from the cost schedule for the primary project.

**Question 16: Are there any specific legal or regulatory compliance requirements that need to be addressed in the proposal?**

**Response 16:** All legal and regulatory compliance requirements for the strategic planning process are described in the RFP and its Appendix A(CIS Contract Considerations).

**Question 17:** Will CIS entertain a longer period of performance for creation of the plan (i.e. 12-18 months is a typical minimum for creating a 5-year strategic plan)?

**Response 17:** CIS intends for the strategic plan created out of this process to take effect Fiscal Year 2024-25 beginning July 1, 2024. We are interested in proposals for a planning process that can be completed within the timeframe described in the RFP's Scope of Work.

**Question 18:** We are a New Mexico based company that has insurance and the ability to perform business across all 50 states. What exactly is required to be able to do business in the State of Oregon and in the local jurisdiction? Is there a license or registration that must be completed? Please advise.

**Response 18:** Proposers should consult with legal counsel on what licensing requirements or other authorization may be needed to conduct business in Oregon. CIS is not able to advise on this.

**Question 19:** Per our review of the CIS request for proposal (RFP) document – does the CIS expect that a total of 6 months to be the period of performance? Is this a hard date or can our team propose a longer time frame of 1 year.

**Response 19:** See the response to Question 17.

**Question 20:** Is there any guidance that you can share on the budget?

**Response 20:** See the response to Question 2.

**Question 21:** Is the current strategic plan available for review prior to the proposal submission?

**Response 21:** A copy of the current strategic plan will be provided to the successful proposer.

**Question 22:** What are the current "pain points" and/or emerging issues that CIS is hoping to address in its next strategic plan?

**Response 22:** CIS will discuss pain points and emerging issues with the successful proposer.

**Question 23: What is your vision for CIS member involvement? For example, do you envision establishing a member task force, making a general outreach to the membership as a whole, or another approach?**

**Response 23:** CIS' primary interest in seeking member input is identification of emerging issues they are facing that we may be able to help address. Though that is the primary interest, we are open to member input on other aspects of the plan as well. As described in the RFP's Scope of Work, the input can be obtained through online meetings, focus groups, or online survey, as appropriate.

**Question 24: Is there a critical mass of member officials that you would like to have involved in the process?**

**Response 24:** CIS does not have specific expectations for the number of member officials involved in the strategic planning process.

**Question 25: Although local agents aren't mentioned in the RFP, will their input be solicited as part of the planning process?**

**Response 25:** Agents are a separate stakeholder but often participate in member advisory committee meetings, which are regularly conducted, and are included in regular member survey distributions. You can consider specific agent input as a value-added service but is not part of the scope for this request for proposal.

**Question 26: Do you envision obtaining input from staff as a whole only at the outset, or will you also solicit their input on the draft plan that emerges after the retreat and Executive Team work?**

**Response 26:** Broad staff engagement is expected throughout the strategic planning process, though no specific timing has been defined in this RFP. Recommendations are welcomed in the proposals but will likely be determined during initial planning with the successful proposer.

**Question 27: Do you envision a role in the process for LOC and AOC, beyond the input that their representatives on the CIS Board provide?**

**Response 27:** CIS anticipates that the primary roles for the League of Oregon Cities (LOC) and Association of Oregon Counties (AOC) will be through their representatives on the CIS Board of Trustees. However, LOC and AOC are also member organizations.

**Question 28: Given your experience with previous CIS strategic planning activities, is there a preferred format for the Board retreat?**

**Response 28:** CIS does not have a preferred format for the Board retreat, except that it must fit within the allotted time at the retreat.

**Question 29: How much of the time at the Jan. 4 - 5 retreat will be devoted to strategic planning?**

**Response 29:** Two days have been scheduled for the Board's Retreat and can be considered available for strategic planning. While additional business is expected to be conducted during these two days, there is a possibility of adding time outside of these days for strategic planning work with the Board. Recommendations are welcomed in the proposals, but the Retreat agenda will likely be determined after initial planning with the successful proposer.

**Question 30: Would CIS consider alternatives to the general and auto liability insurance coverage limits listed in Appendix A, or are those limits non-negotiable?**

**Response 30:** As stated in Section IV(C)(Exceptions and Deviations) of the RFP, any exceptions to or deviations from the requirements of the RFP and addendums should be declared in a separate element of the proposal under the heading "Exceptions and Deviations".

**Question 31: Has CIS conducted a member engagement/customer satisfaction survey within the past year or two? If so, can those results be provided?**

**Response 31:** CIS conducts a member satisfaction survey annually. Results of past surveys can be shared with the successful proposer.

**Question 32: Has CIS conducted a recent employee engagement/workplace culture survey? If so, can that be shared?**

**Response 32:** CIS has recently engaged in workplace culture work but has not specifically conducted an employee engagement or workplace culture survey. Results of the workplace culture work can be shared with the successful proposer.

**Question 33: Can CIS share the approximate number of stakeholders we should be prepared to interview?**

**Response 33:** Approximately 19 people will be involved in the in-person workshops and meetings, including nine members of CIS' Executive Team and ten members of CIS' Board of Trustees.

**Question 34:** For planning and scoping purposes, can you please share your project budget estimate?

**Response 34:** See the response to Question 2.