

STATE OF MARYLAND JUDICIARY
PROCUREMENT AND CONTRACT ADMINISTRATION
REQUEST FOR PROPOSALS (RFP)
Strategic Planning Facilitator Services

This procurement is being conducted as a Small Procurement as described in the Judiciary Procurement Policy, not to exceed \$25,000.

1. Agency Information

The Office of Emergency Preparedness and Court Security provides emergency preparedness and security technical assistance, planning and training to all offices within the Judiciary. It is responsible for a range of services that include, but are not limited to, Continuity of Operations (COOP) planning, coordination with state and local agencies, development and legal research, project oversight and grant administration. The office also serves as a repository of data, plans, and incident reports for statistical and needs analysis, training, and future administrative decision-making and response.

2. Scope of Work

Contractor shall facilitate a one-day planning session, compile and disseminate the resulting draft plan, and facilitate a one-day follow-up evaluation and information-sharing session with court leaders in Maryland for a pilot group of three teams comprised of four members per team. The AOC shall have the option to add or eliminate teams. The sessions shall be held simultaneously requiring a facilitator for each team.

2.1 Deliverables:

2.1.1 Initial Facilitation

The Contractor shall provide Strategic Planning facilitators to the three court leadership teams for one day planning sessions. The facilitation shall include, but is not limited to the following:

- Determining a shared vision of excellent court security for the individual courthouses;
- Establishing a framework for achieving the vision;
- Identifying critical barriers to success; and
- Drafting an action plan for achieving the shared goals.

The strategic planning portion of the proposed security solution is critical to establish goals and objectives, prioritize those goals, determine the required resources to accomplish the objectives, assign roles and tasks, and establish a timeline for accomplishing each goal.

2.1.2 Compile and Draft Initial Plan

Within one month after completion of the planning session, the Contractor shall provide the Contract Manager with a customized written report based upon the work product and outcomes generated during the planning sessions.

2.1.3 Follow-up Session Facilitation

The Contractor shall provide facilitators to court leadership teams for a one-day follow-up evaluation and information sharing sessions. The facilitation shall include, but is not limited to the following:

- Assessing the team's progress;
- Identifying areas for improvement;
- Determining future needs;
- Training teams for future action planning; and
- Encouraging discussion on best practices for implementing change.

2.2 Contractor shall provide all communication equipment, technology equipment and software to employees who are assigned to work on the contract.

2.3 Contractor shall, prior to starting any work, must furnish the AOC with a complete list of all facilitators and a copy of their resume.

2.4 Contractor shall provide a Security Strategic Action Plan in a mutually agreed upon format for approval by the Contract Manager. The plan must include information as set forth in RFP Sections 2.1.1 and 2.1.2.

2.5 Contractor shall provide at least three Strategic Planning Facilitators to perform services and generate deliverables, as required by this Contract. Hiring, training, payment of wages and benefits, nametags, equipment, supervision, transportation costs, direction and discharge of Strategic Planning Facilitators shall be the responsibility of the Contractor. Contractor is responsible for complying with all required federal, state and local employment laws and regulations.

2.6 Minimum Qualifications. Facilitators provided by the Contractor shall possess the following skills and abilities:

2.6.1 The facilitator for the planning session is **not** required to have a background or specialized knowledge of court security. Instead, the facilitator shall demonstrate their knowledge, skills, and abilities to guide judicial leaders to a shared vision and action plan for success.

- 2.6.2 Ability to speak, read, write, understand and properly use documents written in English.
- 2.6.3 Capable of exercising good judgment, implementing instructions and assimilating necessary specialized training.
- 2.6.4 Proficient with Microsoft suite, Adobe Acrobat and all necessary computer software to perform the functions outlined within the Contractor's Work Plan.
- 2.6.5 Have a minimum of three years of experience facilitating strategic planning sessions. Experience providing facilitation to government entities preferred.
- 2.6.6 Possession of an Association for Strategic Planning Certification (Strategic Planning Professional (SPP or SMP), or equivalent, is preferred.
- 2.6.7 Prior to acceptance of any Strategic Planning Facilitator by the AOC, Contractor shall provide proof of required training and certifications for each facilitator.
- 2.6.8 Contractor shall communicate all written materials provided by AOC to each facilitator, including rules, procedures, regulations, guidelines and instructions, and shall ensure that each facilitator adhere to the standards set forth in such materials.
- 2.6.9 Contractor shall **not** be reimbursed for any travel expenses, including but not limited to, transportation, meals, hotel accommodations for residences located within a 50-mile radius of the Contractor's location. Reimbursement for any travel expenses shall be at the AOC's per diem rate and must be approved in advance by the Contract Manager.
- 2.6.10 Contractor shall **not** be responsible for providing the location for the sessions or any refreshments provided to the participants.

3. Contract Type

The resulting contract shall be for Fixed Price. If the pilot proves to be successful, the AOC may request that the Contractor facilitate additional sessions at the unit prices proposed.

4. Contract Term

The term of the engagement that results from this RFP will be no longer than one year from date of award. If the pilot proves to be successful, the AOC may request that the Contractor facilitate additional sessions at the unit price as proposed.

5. Procurement Officer

The sole point-of-contact for purposes of this RFP prior to award shall be the Procurement Officer at the address listed below:

Susan Howells, Procurement Officer
Telephone: 410-260-1410
Email: susan.howells@mdcourts.gov

Offerors are specifically directed NOT to contact any Judiciary personnel or its contracted consultants for meetings, conferences, or discussions that are specifically related to this RFP at any time prior to any award and execution of a contract. Unauthorized contact with any Judiciary personnel or the Judiciary's contracted consultants may be cause for rejection of the Offeror's proposal.

6. Form of Response

Proposals must be in writing. Two volumes must be separately prepared and submitted.

6a. Volume I – Technical proposal a written response to the Scope of Work that demonstrates that the Offeror meets the minimum qualifications of the RFP outlined in Section 2.6 and demonstrates the Offeror's skills and experience in providing the required services. The Technical proposal must also include a Work Plan for the proposed services.

6b. Volume II – Price proposals must include the fully loaded fixed price for the services proposed using Attachment A (Price Proposal Form).

7. Proposal Closing Date

All proposals must be received via email to the Procurement Officer at the email address listed in Section 5, no later than 2:00 PM (local time) on October 26, 2012 in order to be considered.

8. Oral Presentations

Offerors will be asked to make oral presentations summarizing their technical proposal to the evaluation committee. In addition, Offerors will be asked that at least one proposed facilitator present to the committee.

9. Evaluation Criteria in descending order of importance:

- Offeror's Experience
- Offeror's Work Plan for this engagement
- Price

10. Award Determination

The award resulting from this RFP will be to the Offeror whose proposal is determined to be the most advantageous to the State, based on the evaluated spectrum of services proposed and price.

Attachment A –Price Proposal Form

FOR SERVICES AS REQUIRED AND PROPOSED, THE TOTAL PRICE TO BE CHARGED SHALL BE:

INITIAL FACILITATION \$ _____
(REFERENCE RFP SECTION 2.1)

COMPILE AND DRAFT INITIAL PLAN \$ _____
(REFERENCE RFP SECTION 2.2)

FOLLOW-UP SESSION FACILITATION \$ _____
(REFERENCE RFP SECTION 2.3)

TOTAL PROPOSED PRICE \$ _____

SUBMITTED BY

AUTHORIZED SIGNATURE **DATE**

PRINT NAME AND TITLE

COMPANY NAME

COMPANY ADDRESS

TELEPHONE

FEDERAL TAX IDENTIFICATION # _____