



Request for Proposal (RFP)

City of Olympia | Capital of Washington State

Meeting Facilitation for Annual City Council Planning Retreat

PURPOSE

The purpose of this Request for Proposal (RFP) is for the City of Olympia (City) to solicit proposals from qualified respondents to provide meeting facilitation services to support the City Council’s annual strategic planning retreat in early 2022.

Response to this RFP does not commit the City to pay any costs incurred in the preparation of the response, demonstrations, or any other activities related to this response. All responses and accompanying documentation become the property of the City and will not be returned. This RFP does not obligate the City to contract for services or products specified herein. The City reserves the right to revise the RFP and/or to issue addenda to the RFP.

The deadline for submission of proposals is **4:00 p.m., Pacific Time (PT), Monday, August 2, 2021.**

BACKGROUND

The City of Olympia operates under a council-manager form of government. The City Council has seven members including the Mayor. Councilmembers and the Mayor are non-partisan elected officials. The City Manager reports to the City Council.

In January of each year, the City Council holds a planning retreat to develop its yearly goals and working agreements in order to arrive upon a broad consensus that serves as a framework for Council action in the coming year.

The City hires a professional meeting facilitator to organize and facilitate the Council’s planning retreat in order to maximize the productivity of these retreats and to allow the Council to move through multiple discussions on topics of a complicated nature over the course of two days.

The meetings are open to the public and are planned with the expectation that members of the public will be in attendance, but typically do not attract a large audience.

SCHEDULE

The following schedule is to inform vendors of the estimated timetable of the RFP response preparation and evaluation. Please note the following dates when preparing your response to the RFP. The City reserves the right to modify this schedule at its discretion; timelines will never shorten.

SCHEDULE DATES	DATE
Issuance of Request for Proposal (RFP)	July 6, 2021
Deadline for questions from Proposers	July 13, 2021
Responses to questions with Question & Answer addenda from City	July 19, 2021
Proposal responses due	4:00 p.m., Pacific Time (PT), August 2, 2021
Finalist(s) selected and notified	Week of August 16, 2021
Finalist Interviews	August 25, 2021
Selection Notification	August 26, 2021

OBJECTIVES

The selected facilitator will be responsible for working with the Olympia City Council’s General Government Committee and City Manager to develop a detailed agenda for the 2022 City Council Planning Retreat, and for planning and facilitating discussions with the City Council and selected staff in order to deliver a retreat that results in a clear strategic planning direction for the City Council in the coming year.

The selected facilitator(s) will be expected to be available to do pre-meeting research and planning with Councilmembers and staff, to be on-site or virtually (pending status of COVID-19 phases) to facilitate the Council retreat on January 14 and 15, 2022 and to have the final written work product complete by February 15, 2022.

DELIVERABLES

- **Agenda Planning** Work with the City Manager or designee(s) to design a detailed agenda for each day of the retreat, including clear delineation of timing, as well as virtual meeting or space requirements (pending status of COVID-19 phases), equipment, logistics and other inputs necessary for a successful retreat.
- **Pre-Meeting Research** Meet with Councilmembers and staff in order to develop the facilitator’s understanding of key issues, interpersonal dynamics, and other factors that should inform the group discussions at the Strategic Planning Retreat.
- **Meeting Facilitation** Facilitate a two-day retreat with the City Council and selected staff in order to create a dynamic and productive retreat experience for participants. The use of live polling software and/or other innovative tools is encouraged but not required.

- **Meeting Outcomes Summary** Produce a written document that summarizes the Council's deliberations, including an overview document that lists City Council priorities in a summary format suitable for distribution.

IDEAL CANDIDATE

A successful facilitator will have experience working with a body of elected officials composed of a variety of personality styles, values, life experiences, viewpoints and levels of understanding about local government. The City Council desires an experienced facilitator who:

- Can help build mutual understanding, trust, and transparency among Councilmembers who have a wide range of experience serving as elected officials; ranging from newly elected to 10+ years of service.
- Has demonstrated knowledge of and experience working with organizations navigating issues of social justice and racial equity.
- Has demonstrated knowledge of and experience working with organizations going through transformation, using Change Management concepts.
- Can create opportunities for full involvement and respectful participation in group discussion, keeping in mind various communication styles and personalities and can do so without using personality assessment tools such as MBTI.
- Can help the Council create a targeted set of achievable goals and agreements, given limitations in Council time, budget, and staff capacity.
- Can ensure the City Council and City staff management teams work in sync to create and accomplish the goals and objectives of the City.
- Can form a respectful group dynamic that works efficiently on issues in an open public meeting environment.

Actual local government experience is desired, but not required, as long as the facilitator possesses insight into how policy bodies form, work together, and make meaningful progress toward jointly agreed upon goals and outcomes.

CONTRACT AND COMPENSATION

The City will select one (1) consultant for this contract. The selected consultant will be required to enter into a professional services agreement with the City for a duration of 1 year. The City Council has budgeted up to \$15,000 for the work. The contract may be renewed for an additional time providing that the contract has not exceeded the not-to-exceed contract amount of \$15,000.

The City of Olympia's Professional Service Agreement (PSA) will be the contract document for these services. A sample of the PSA is available for review on the City's website (www.olympiawa.gov/RFP). All consultants are advised that when applicable, the Equal

Benefits Compliance Declaration Form will be used on this project. These contracts are subject to certification of equal benefits provided to all employees.

SUBMISSION REQUIREMENTS

The deadline for submission of proposal is **4:00 p.m., Pacific Time (PT), Monday, August 2, 2021.**

Proposals shall be submitted to the City by email to the RFP Coordinator at sgrisham@ci.olympia.wa.us. The proposal must be in Word or PDF format.

No faxed or mailed submittals will be accepted.

For questions about this RFP, please contact the RFP Coordinator via email at sgrisham@ci.olympia.wa.us. Questions via telephone will not be accepted. All questions to this proposal must be sent to the RFP Coordinator via email by **July 13, 2021.** Questions received after this date may not be answered.

To Make Public Records Request: To obtain records related to this RFP via a public records request, please visit our [Public Records webpage](#). Public records fees apply.

INSTRUCTIONS TO PROPOSERS

Proposals shall be limited to a total of **five (5)** pages (excluding letter of interest).

Provide the Following Information in the Sequence Listed Below:

1. A letter of interest (no more than three (3) pages) outlining your qualifications for this contract and your availability in the timeframe as outlined in this RFP.
2. Work sample of a similar project completed in the last three (3) years, including documentation for one planned facilitated retreat in which you played a significant role. Specify your role and the date of the project. Include the outcomes achieved for the customer. This can be a web link or a document. Identify this customer and provide contact information (name, telephone, email, etc) for this customer.
3. The number of hours required for you to complete the Deliverables; Hourly rate proposed for consultant) to complete the work. A firm, fixed cost for completing the Deliverables.
4. Outline of approach for Deliverables; including a detailed project plan and schedule to complete the Deliverables.

SELECTION CRITERIA

Proposals will be evaluated based on the following criteria:

Method of approach to Scope of Work	20
Previous experience with similar facilitating retreats for government bodies	15
Previous experience with navigating issues of racial equity and social justice	15
Cost Proposal	15
Expertise of facilitator	20
Work Samples	15
Total possible score	100

TERMS AND CONDITIONS

1. Respondents assume the risk of any delay in email. Any RFP received after the designated time will not be considered.
2. Any errors discovered after RFP submission deadline must remain and cannot be adjusted.
3. It is the sole responsibility of the respondent to assure that they have received the most current RFP and addenda.
4. It shall be the responsibility of each respondent to call to the attention of the City any apparent discrepancy in the RFP or any question of interpretation. Failure to do so constitutes acceptance as written.
5. The proposal, as presented, must remain valid for a period of ninety (90) days from proposal due date.
6. The City of Olympia reserves the right to reject all proposals or to request and obtain, from one or more of the respondents, supplementary information as may be necessary for the City to analyze the proposals pursuant to the consultant selection criteria contained herein.
7. The City reserves the right to revise or amend the RFP prior to the proposal due date by written addenda.
8. The respondent, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.
9. The successful respondent will be asked to sign a Contract with the City; the City will not sign any company's service agreement, contract or any other form of agreement. The City does reserve the right to extract certain language from a company's agreement and incorporate it into the City contract, if agreeable to both parties.
10. The City reserves the right to negotiate with the selected respondent(s) the exact terms and conditions of the contract or agreement.
11. The contract resulting from acceptance of a submittal by the City shall be in a form supplied by the City and shall reflect the specifications in this RFP.
12. The insurance certificate required, as detailed herein, shall be submitted upon notification of award.
13. All RFP documents are public record and subject to public disclosure.

14. The successful applicant must comply with all Federal, State, and City of Olympia statutes and codes as may be applicable to the scope of work detailed herein, including all labor laws.
15. The City shall not be responsible for any costs incurred by any respondent in preparing, submitting, or presenting its response to the RFP.
16. Washington State Law and Venue: Any resulting contracts, (if any) shall be construed under the laws of the State of Washington. All claims, actions, proceedings, and lawsuits brought in connection with, arising out of, related to, or seeking enforcement of resulting contracts shall be brought in Thurston County, Washington.
17. All respondents shall obtain and shall produce, upon request, a license to do business in the City of Olympia prior to executing their contract with the City.