



Polk State College Foundation

Request for Proposal
#24-01
Capital Campaign Consultant

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Definitions

College:ReferstoPolk State

Accuracy of Proposal Information

Any proposer included information which is determined to be substantially inaccurate, misleading, exaggerated, incomplete, false, or incorrect shall be disqualified from consideration and may be disqualified from applying for other Polk State College Foundation work for a period of up to three (3) years.

Clarifications

The Foundation reserves the right to request clarification of information submitted and additional information from one or more firms.

Acceptance/ Rejection

The Foundation reserves the right to reject all proposals, to waive any informalities and technicalities, to solicit and re-advertise for new proposals, to abandon the solicitation in its entirety, or to make the award to the proposer who, in the opinion of the Foundation will be in the best interest of the Foundation. The Foundation reserves the right to accept or reject any proposal at any time without explanation.

performance of this service as shown in the submission. The successful proposer will also obtain approval from the Foundation prior to assigning any new personnel to their key staff positions. The Foundation may demand prior written substantiation require the removal of any employee(s) of the successful proposer who the Foundation reasonably deems incompetent, careless, insubordinate, unsuitable, or otherwise unacceptable or whose continued employment on the contract it deems contrary to public interest or not in the best interest of the Foundation.

Background Screening Requirements

As a condition of the award, the successful proposer shall, at its expense, ensure that all the proposer's employees and employees of the proposer's subcontractors who will be permitted access on college grounds when students are present meet the background screening requirements of Section 1012.465, Florida Statutes, (Jessica Lunsford Act). The proposer's failure to comply with this requirement will constitute a material breach of the contract. Information regarding the compliance procedure is available by calling Procurement Services at Polk State College at 863.297.1083. All costs to comply with this requirement will be borne by the proposer.

Contact

Respondents to this solicitation or persons acting on their behalf may not contact between the release of the solicitation and the end of the 72-hour period following the posting of the intent to award notice, excluding Saturdays, Sundays, and state holidays, any employee or officer of the Foundation or Polk State College concerning any aspect of this solicitation, except in writing, via email, to nv Tc w 7-1.5 (a)2)5 (nd5 (ha)4t3 (ni)1.5 poi (u)1.t [(po) (of)-2.8 (c)4onta9 (f)4 (onc.8 (t)

Americans with Disabilities Act

The contractor shall comply with the Americans with Disabilities Act. In the event of the contractor's non-compliance with the non-discrimination clauses of the Americans with Disabilities Act, or with any other such rules, regulations or orders, any contract resulting from this RFP may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further contracts.

Anti-Discrimination Clause

The non-discrimination clause contained in Section 202, Executive Order 11246, as amended by Executive Order 11375 relative to Equal Employment Opportunity for all persons without regard to race, color, religion, sex, or national origin, and the implementing rules and regulations provided by the Secretary of Labor are incorporated herein.

Unauthorized Employment of Alien Workers

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Comprehensive Automobile Liability Insurance (including hired and non-owned vehicles, if any) in limits of One Million Dollars (\$1,000,000) Combined Single Limit each accident.

Professional Liability Insurance - \$1,000,000 per occurrence and a \$3,000,000 aggregate covering wrongful acts, errors, or omissions. Coverage must remain in force (5) years after the date of services are performed.

2. **Worker Compensation Insurance:** The contractor/vendor shall maintain, during the life of this agreement, Workers Compensation Insurance for all employees connected with the work of this project. If any work is sublet contractor/vendor shall require the subcontractor to provide Workers Compensation Insurance for all subcontractor employees unless such employees are covered by the protection afforded by the contractor. Such insurance shall comply fully with the Florida Worker Compensation Law. In case any class of employees engaged in hazardous work under this contract at the site of the project not protected under the Worker Compensation Statute the contractor shall provide, and cause each subcontractor to provide, adequate insurance satisfactory to the purchaser, for protection their employees not otherwise protected.

Workers' Compensation Insurance in compliance with statutory limits, (Chapter 440 Florida Statutes):

Employer Liability

Five Hundred Thousand (\$500,000) each accident

Five Hundred Thousand (\$500,000) bodily injury or disease, each employee

Five Hundred Thousand (\$500,000) disease, policy limit

Scope of Work

This Request for Proposal aims to retain an organization, firm, or individual with a proven track record in developing and executing a campaign to generate

2. Drug-Free Workplace: Please complete Appendix D (Drug-Free Workplace Form) and submit it in this section in accordance with Section 287.087 Florida Statutes, whenever two or more proposals are being considered. If a proposal that includes the attached Drug-Free Workplace form shall be given preference in the award process.
3. Subsidiaries: Name any subsidiary or affiliated companies in which principals have a financial interest. Detail the principals' interest in this company and the nature of the business.
- 4.

3. Notification of Shortlisting

The shortlisted proposers will be notified as follows:

- a. An email will be sent to those firms who have been shortlisted notifying them of the place and time of their interview/presentation.
- b. Specific questions/clarifications that the Evaluation Committee would like for all proposers to address will be included in this notification.
- c. Should the evaluation criteria for the oral presentations be changed, the revisions will be included in the email.

4. Reference Check

The Foundation shall perform a written reference check.

- a. A reference questionnaire will be emailed to each of the references listed in the proposal.
- b. A written tabulation of the responses will be provided to the Evaluation Committee.

5. Oral Presentation/Interview

Scores from the written evaluation will not be brought forward to the oral presentation/interview. Only preference of position in interview order will be advantaged by shortlisted ranking.

Oral presentations are tentatively scheduled for the dates listed in Appendix A. Proposers should plan 20 minutes for introductions and presentations and 20 minutes for questions and discussion in a sit down meeting format.

The Evaluation Committee would like those individuals who will be directly involved in the project to attend the presentation/interview.

If a proposer's presentation uses PowerPoint, which the Foundation prefers a flash drive for the presentation, must be provided.

The Foundation will provide a computer and a screen for use. Shortlisted firms should bring their PowerPoint presentation on a flash drive. Shortlisted firms may bring their own equipment to use for PowerPoint (or other) presentations if they choose.

The oral presentations are exempt from the Sunshine Law, FS 286.011, and therefore are not open to the public.

6. Identical or Tie Scores

In the event two or more proposers are deemed equal during the evaluation process, the following criteria, in order of importance, shall be used to break said tie:

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7. Evaluation Criteria Rating Sheets

The Evaluation Committee will review the proposals received in response to the RFP based on the evaluation criteria included in this document. The Evaluation Committee will utilize the attached Evaluation Rating Sheets for both the shortlist and/or presentation/interview portions of the process.

8. Recommendation

The Evaluation Committee will make a recommendation to the College President and, upon their approval, then to the Foundation Board.

9. Negotiation and Award

The Foundation anticipates award to the highest ranked proposal by the Foundation to be the most qualified. Final approval of the ranking of proposer(s) shall be by the Foundation Board at a scheduled meeting.

The RFP and ranking process does not constitute an offer agreement or a contract with the proposer. Once the ranking is approved, negotiations will commence with the firm ranked first. Failure to complete negotiations with the firm ranked first will result in negotiations with the next highest ranked firm.

SELECTION CRITERIA RATING FOR WRITTEN PROPOSAL

RFP #2401

Capital Campaign Consultant

Project Location: Winter Haven Campus

Name of the Firm:

INSTRUCTIONS: Rate the information in each of the following sections and sign below.

Evaluation Criteria	Maximum Points	Awarded Points
Firm Experience & Qualifications: The firm demonstrates extensive expertise and a proven track record in executing successful campaigns. Crucial elements include the firm's history in the industry, years of experience, the impact of past fundraising projects, and the firm's ability to meet or exceed fundraising goals consistently.	20	

Approach & Methodology: The firm's proposed approach and methodology are well-structured and demonstrate a deep understanding of effective fundraising strategies. The firm's innovative techniques and comprehensive plan are tailored to specific goals and challenges, ensuring a targeted and efficient campaign. This thoughtful and strategic approach inspires confidence in their ability to achieve outstanding results for Theersta a capital campaign. aign.aign.aign.aign.aign.a12 80.52i4.64 re W1 Tf -0.0

SELECTION CRITERIA RATING FOR PROPOSAL PRESENTATION	
RFP #24-01	Capital Campaign Consultant
Project Location: Winter Haven Campus	
Name of the Firm:	

INSTRUCTIONS: Rate the information in each of the following criteria.

Evaluation Criteria	Maximum Points	Awarded Points
Experience in Capital Campaigns The firm displays extensive expertise in capital campaigns within the profit sector. Their t7 (t579.8gG5)Or (e)1 59 (ap):ie ieuih nuieehn(o)4 uy.		

AppendicesList

Appendix	Type	Description
A	Informational	Procurement and Selection Timeline
B	Required	Proposal Information
C	Required	Drug-Free Workplace Form
D	Required	Dispute and Disclosure Form
E	Required	References
F	Required	Non-Collusion Affidavit of Prime Proposer

Appendix A

Polk State College Foundation	
RFP # 2401	For: Capital Campaign Consultant
Location: Winter Haven Campus	

PROCUREMENT SELECTION AND TIMELINE	
Request for Proposal (RFP) - Release Date	August 22, 2024 Time: N/A
Deadline to Submit Questions to foundation@polk.edu	September 3, 2024 Time: 5:00 PM EST
Answers to Questions Posted to (https://www.bidnetdirect.com/florida/polkstatecollegefoundation)	September 6, 2024 Time: 5:00 PM EST
Due Date for Proposals and Proposal Opening	September 12, 2024 Time: 4:00 PM EST
Evaluation Committee Meeting and Shortlisted Selection for Presentations	September 19, 2024 Time: TBD
Shortlisted Presentations	September 25, 2024 Time TBD
Evaluation Committee Meeting and Firm Selection	September 26, 2024 Time: TBD
Intent to Award	October 2, 2024 Time: N/A

Appendix B

Polk State College Foundation	
RFP # 2403	For: Capital Campaign Consultant
Location: Winter Haven Campus	

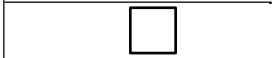
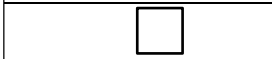
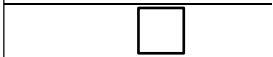
PROPOSER INFORMATION	
Proposer(Company) Name:	Formerly:
Mailing Address:	Street Address:
City, State, Zip:	City, State, Zip:
Type of Entity: <i>(check one)</i> <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Joint Venture	
Contact Person:	Title:
Email Address:	Website Address:
Telephone Number:	Toll-Free Phone Number:
Fax Number:	Cell Phone Number:
Federal Employer Identification Number (FEIN):	SSN (if Sole Proprietorship or Partnership):
Incorporated in	<i>Only required if FEIN is not provided</i>

Appendix C

Polk State College Foundation	
RFP #24-03	For: Capital Campaign Consultant
Location: Winter Haven Campus	

DRUG-FREE WORKPLACE FORM

The undersigned vendor, in accordance with Florida Statute 37.44(5)(b) and 37.44(5)(c), hereby certifies that the undersigned vendor and its employees, agents, and subcontractors will not use, possess, or be under the influence of any controlled substance or alcohol while performing the work under this contract.



Appendix E

Polk StateCollegeFoundation

Appendix F

Polk State College Foundation	
RFP #24-03	For: Capital Campaign Consultant
Location: Winter Haven Campus	

NON -COLLUSION AFFIDAVIT OF PRIME PROPOSER

State of _____ County of _____, being first duly sworn, deposes and says that:

He/she is (Title) _____ (Company Name) _____ the proposer that has submitted the attached bid; He/she is fully informed respecting the preparation and contents of the attached RFP and all pertinent circumstances respecting such bid.

Neither the said proposer nor any of its officers, partners, owners, agents, representatives or employees in interest, including his affiliates, in any way colluded, conspired, connived, agreed, directly or indirectly, sought agreement or collusion or communication or conference with any other proposer, firm or person to fix the price or prices in the attached proposal or of any other proposer, or to fix any cost, element of the proposal price or the proposal price of any other proposer, or to secure through any conspiracy, connivance or unlawful agreement any advantage against the Polk State College Foundation.

The price or prices quoted in the attached

END OF REQUEST FOR PROPOSAL PACKAGE