



## **Comprehensive Consultation on Virtual Presence, Digital and IT Strategy**

**September 30, 2020**

**Proposals Due: 5:00 PM on October 30, 2020**

### **PROJECT OBJECTIVE**

The National Setting of the United Church of Christ ("Organization") is requesting Consulting services on Virtual Presence, Digital and IT Strategy. The focus of this work is to advance and support the Organization's brand presence in the virtual community space, enhance digital strategies that position the organization resoundingly to our external stakeholders, and improve IT efficiencies relative to our departmental functions. The firm or consultant selected will be responsible in completing the items identified in this project's scope of work.

The Organization invites you to submit a proposal to furnish materials in accordance with the terms, conditions and specifications contained in this document. Please complete the proposal form as instructed below and return it to the specified mailing address by the due date. No extensions to the deadline will be allowed. All responses should be e-mailed to:

### **PROJECT CONTACT:**

Alisa Lewis  
Director of Human Resources  
United Church of Christ  
700 Prospect Avenue  
Cleveland OH 44115  
lewisam@ucc.org

Questions and requests for clarification and/or additional information shall be directed in writing to Alisa Lewis, Director of Human Resources. Responses to questions/clarifications will be posted on the organization's website as addendums and any Consultant who has provided an e-mail will be notified via e-mail of the posting. Consultants are required to provide an e-mail address to which we may send responses.

### **ORGANIZATION OVERVIEW**

The United Church of Christ (UCC) is a progressive Christian denomination based in the United States with robust global partnerships around the world, encompassing 39 Conferences, more than 4200 local churches, and more than 900,000 individual members. We are a distinct and diverse community of Christians that come together as one church, joining faith and action.

The UCC National Setting, located at 700 Prospect in Cleveland Ohio, is the national office of the denomination and has a workforce of 100 employees – some of whom are based in Cleveland and some of whom are deployed. In addition, the national office has a satellite office in Washington DC.

The UCC National Setting is charged with resourcing the work and ministries of our local churches, actualizing mandates of our General Synod, and providing opportunities for mutual responsibility, collaboration and reporting across the denomination. We are actively working towards attaining strategic priorities that include Fostering Innovation, Strengthening the UCC Technology Infrastructure, Organizational Alignment, Inclusive Excellence, and Training and Development – all towards a Just World for All.

## **PROJECT REQUIREMENTS AND SPECIFICATIONS**

### **A) General Description of Project**

The Organization is seeking the professional support of a firm or consultant knowledgeable and experienced in emerging best practices in the areas of virtual presence, digital strategies and information systems to conduct a needs assessment and prepare a strategic plan to serve as a road map for addressing the short and long-term needs of the Organization in the areas of virtual presence, digital strategies and information systems. The plan should contain clear goals and action items that will move the Organization forward and is structured in a manner that allows for ease and clarity of implementation by staff and other resources.

The Organization is interested in working with a firm or consultant who can assist in:

- Evaluating the existing resources in support of virtual presence and digital strategies including staffing, digital platforms, software services, and technology as they pertain to organizational stakeholders and business environments
- Identifying best practice digital strategies consistent with UCC mission, purpose and strategic priorities including digital framework and infrastructure to support these digital strategies.
- Prioritizing the enhancement and/or replacement of key digital, business and information systems
- Providing recommendations to create a more unified virtual presence
- Developing a five-year IT strategic plan that clearly defines goals and objectives, including staffing, digital platforms, software services, and technology as they pertain to organizational stakeholders and business environments.

## **SCOPE**

The Organization anticipates a project scope that includes activities outlined below, however, proposers should develop a plan of work they believe will most effectively meet the Organization objectives of assessing current service and technology gaps, ultimately developing a roadmap for improved business systems.

- Evaluate the Organization's current technology environment, including services provided, infrastructure, funding and service methodology

- Evaluate the Organization's current digital and IT application portfolio
- Meet with key staff in all departments of the Organization, as well as IT, to determine desired digital strategies that support virtual presence, and business and technology needs
- Prioritize application and technology infrastructure requirements based on the Organization's current and proposed digital and IT strategy needs and goals, and evaluate alternative approaches for meeting those needs
- Provide estimated budget(s) of each recommended application and infrastructure requirement for initial implementation and ongoing support
- Develop recommendations that will help ensure the Organization's ability to effectively use technology to support its virtual presence, digital strategies and communication and marketing needs.
- Document and present findings in a comprehensive plan
- A five (5) year plan is requested
- The final plan should be a high level and concise strategic plan including a tactical plan to implement the recommended strategies.

#### **A) Deliverables**

The first deliverable will contain the results of the Virtual Presence, Digital and IT needs assessment that considers the business needs and goals of the organization.

The second deliverable will be the Virtual Presence, Digital and IT Strategic Plan. The plan should address the most critical systemic needs of the organization over the next 5 years. The final plan will include the resources needed (hardware, software, implementation, training, and staff resource requirements) and corresponding estimated costs for implementation and on-going support. This should also include a detailed tactical plan with prioritized initiatives, phasing, and individual project timelines.

#### **B) Schedule**

The contractor is expected to submit a proposed timeline for this project's implementation.

#### **C) Project Services**

The Organization would like the project to begin within 15 days of contract signing and completed within 60 days thereafter.

### **MINIMUM QUALIFICATIONS AND REFERENCE CONTACT INFORMATION**

**Firm / Consultant Qualifications:** The Firm/Consultant has at least five years of experience delivering a similar scope of services and/or project work for organizations.

**Firm References:** Provide a listing of at least three current and/or completed representative projects which includes:

- Project Name and Location

- Description, Results and Completion Date
- Client Name, Contact, Address, Telephone Number

## **PROPOSAL SUBMITTAL REQUIREMENTS**

The Proposal should describe the methodology to be used to accomplish each of the project tasks and services as they are defined in the Scope of Work. The Proposal should also describe the work that will be necessary to satisfactorily complete the tasks and service requirements.

Please note that this Request for Proposal cannot identify each specific, individual task required to successfully and completely implement this project. The United Church of Christ relies on the professionalism and competency of the Proposing Firm or Consultant to be knowledgeable of the general areas identified in the Scope of Work and of adequate competence to include in its proposal all required tasks and subtasks, personnel commitments, man hours, direct and indirect costs, etc.

Amendments to proposals are allowed prior to the proposal due date and must be made in writing. A vendor may withdraw its proposal at any time prior to the proposal due date by notifying the Submittal Contact in writing. Amendments or withdrawals offered in any other manner than described will not be considered.

Proposals cannot be amended or withdrawn after the proposal due date.

### **A) Responses should be organized into the following sections**

- 1) Letter of Interest:
  - Must include firm name, address, telephone number, and fax number. Letter must be signed by person authorized to bind firm by contract.
- 2) Firm Organization:
  - Type of ownership- individual, partnership, or corporation
  - Number of years in business
  - Listing of primary disciplines and services provided
  - Size of firm
  - Information on the firm's commitment to diversity in its workforce
  - Insurance coverage in force (general liability, professional liability, automotive liability, worker's compensation) and limits of same.
- 3) Project Team:
  - Identify key personnel proposed for this project
  - Include bios for key personnel and their experience on comparable projects
  - Identify subcontractors, if any, to be utilized and include resumes showing their experience on comparable projects
- 4) Qualifications/Reference:
  - Provide a minimum of three references.
  - Include sample of similar work performed for another organization
- 5) Understanding of Project Requirements and Specifications:
  - In this section, Proposers are requested to demonstrate their understanding of the task and services requested
  - Describe your approach, including key activities and task to complete, to meet the

objectives outlines in the

- Provide a proposed project schedule including milestones and project completion

6) Cost Proposal:

- Provide a detailed fee proposal that reflects the project phases and/or milestones. The fee proposal should include all anticipated reimbursable expenses as a separate line item, and the charge rates of the people who would perform the work (please identify tasks to be performed by sub- consultants). The Organization anticipates a fixed fee for service.
- All quotes shall be held firm for a minimum of ninety (90) days after the proposal due date to allow adequate time for the Organization to consider each proposal and make an award.
- Upon receipt of this proposal by the Organization, the Firm / Consultant shall be presumed to be thoroughly familiar with all aspects of this work. The failure or omission to examine any location, equipment, form, instrument or document shall in no way relieve Consultant from any obligation with respect to this proposal

7) Timeline from Project Commencement to Completion

B) **Due Date:** The proposal must be received via e-mail before October 30, 2020 at 5:00 p.m. to:

Alisa Lewis  
Director of Human Resources  
United Church of Christ  
700 Prospect Avenue  
Cleveland OH 44115  
[lewisam@ucc.org](mailto:lewisam@ucc.org)

Any questions pertaining to this Request for Proposals must be submitted via e-mail and directed to the contact above.

**SCHEDULE**

| <b>RFP Schedule</b>                                     | <b>Dates</b>                    |
|---|---------------------------------|
| RFP Issued  | Wednesday, September 30, 2020   |
| Written Inquiries (on or before)                        | Friday, October 9, 2020         |
| Organization Response to Written Inquiry (on or before) | Friday, October 16, 2020        |
| <b>Proposals Due</b>                                    | <b>Friday, October 30, 2020</b> |
| Potential Interviews and Negotiations                   | Week of November 10, 2020       |
| Notice of Award and Contract Negotiations               | Week of November 17, 2020       |
| Project Start   | 15 Days after Contract Signing  |

## **FIRM / CONSULTANT SELECTION**

### **A) Review**

The Organization will conduct a comprehensive, fair, and impartial evaluation of the proposals received. Each proposal will be reviewed by an evaluation committee to determine if it meets the proposal requirements. The committee will then select the most qualified firms for interviews, and will rank the consultants based upon the following criteria:

- Qualifications, background and prior experience of the Firm / Consultant, experience of key staff assigned to oversee services provided to the United Church of Christ, evaluation of size and scope of similar work performed and success on those projects as well as estimated time for completion
- Total cost for services proposed. Cost is not the sole determining factor but will be taken into consideration
- Past project performance feedback by references provided
- Ability to meet the proposed project timeline

### **B) Interviews**

The evaluation committee may, at its discretion, ask for interviews or oral presentations by any Proposer(s) participating in this process. Attendance at any such interview will be at the Proposers expense.

### **C) Selection**

A final selection of a Firm / Consultant will be determined following review of all work and cost proposals and/or formal oral presentations. The evaluation committee will make a recommendation of the selected Firm / Consultant for a contract to be awarded.

### **D) Right by the Organization to Withdraw this Request**

The United Church of Christ, at its sole discretion and for any reason whatsoever, may withdraw this Request For Proposal at any time.

### **E) Conditions for Responses to Request for Proposal**

The following conditions apply to the Request for Proposal process:

- Nothing contained in this Request for Proposal shall create any contractual relationship between the respondent and the United Church of Christ
- This Request for Proposal does not obligate the United Church of Christ to establish a list of service providers qualified as prime contractors, or award a contract to any respondent. The United Church of Christ reserves the right to amend or cancel the Request for Proposal without prior notice, at any time, at its sole discretion.
- The United Church of Christ shall not be liable for any expenses incurred by any individual or

organization in connection with the Request for Proposal.

- No conversations or agreements with any officer, agent or employee of the United Church of Christ shall affect or modify any terms of this Request for Proposal. Oral communications or any written/e-mail materials provided by any person other than the designated contact staff of the United Church of Christ shall not be considered binding.
- The United Church of Christ reserves the right, in its sole discretion, to accept or reject any or all proposals without prior notice and to waive any minor irregularities of defects in a proposal. The United Church of Christ reserves the right to seek clarification on a proposal with any source.
- The dates, times and sequence of events related to this Request for Proposal shall ultimately be determined by the United Church of Christ. The schedule shown above is subject to change, at the sole discretion of the United Church of Christ, although the Organization will attempt to follow it and, if it must be altered, will attempt to provide reasonable notice of the changes.
- Respondents shall not issue any news release pertaining to this Request for Proposal, or the United Church of Christ without prior written approval of the Organization.

#### **F) Signed Proposal and Exceptions**

Submission of a signed Proposal will be interpreted to mean that Proposer has hereby agreed to all the terms and conditions set forth in this Request for Proposals. Exceptions to any of the language in the RFP documents must be submitted with the proposal and clearly defined. Exceptions to the Organization's RFP document terms or conditions may be considered in the evaluation process.