



Polk State College Foundation

**Request for Proposal
#24-01
Capital Campaign Consultant**

Table of Contents

Request for Proposal3
Definitions4
General Terms and Conditions4
Insurance Requirements.....7
Background8
Scope of Work.....9
Proposal Submittal Requirements10
Tab Detailed Information.....10
Evaluation of Criteria12
Selection Process.....13
Selection Criteria Forms..... 16
Appendices List.....18
Required Forms.....20



Polk State College Foundation

999 Avenue H, NE
 Winter Haven, Florida 33881-4299

Solicitation Number: RFP #24-01	Solicitation Title: Capital Campaign Consultant	
Issue Date: August 22, 2024	Proposals Due Date: September 12, 2024 @ 4:00 p.m. EDT	Proposals Opening Date: September 12, 2024 - 4:15 p.m. EDT
<p>Solicitation Summary:</p> <p>The Polk State College Foundation was incorporated in 1976 with the mission to provide Polk State College with resources for the advancement of the College, its students, faculty, staff, and other constituencies in fulfillment of the College’s mission.</p> <p>Polk State College is building a new campus in Northeast Polk County, to ensure access to affordable quality higher education for individuals in the fastest growing part of the county. The Polk State Haines City-Davenport Campus will increase access to higher education for the Polk community, which is the fifth fastest-growing metro area in the U.S. and is projected to expand by another 22% by 2030, with the greatest growth expected in the 18 and younger age group.</p> <p>The Career and Technical Education and workforce programs offered in this facility will be tailored to meet the current and future employment demands of Polk’s Northeast sector, specifically in health sciences, teacher education, hospitality and tourism management, and supply chain and logistics. It will house the first public higher education interdisciplinary simulation hospital in Central Florida and will allow for health sciences program expansion.</p> <p>The Polk State College Foundation is accepting proposals for a consultant to assist in developing a capital campaign for the new campus. The capital campaign timeline will run for two years as the campus is constructed.</p>		
Foundation Webpage: https://foundation.polk.edu/request-for-proposal/		
<p>Proposal Submittal:</p> <p style="text-align: center;">Submit responses electronically via https://www.bidnetdirect.com/florida/polkstatecollegefoundation).</p> <p style="text-align: center;"><i>Note: Hardcopy, fax, emailed, or hand-delivered responses will not be accepted.</i></p>		
Polk State College Foundation Official Point of Contact:		
Name: Joanie Malone	Phone: 863.292-3613	Email: foundation@polk.edu .
<p>Upon receipt of this proposal document, all communications regarding this proposal must be made only to the official point of contact. Any violation of this condition could result in proposal disqualification.</p>		
<p>To ensure uniformity, all proposals must be submitted on the enclosed forms or exact photocopies and signed by an authorized representative of the company submitting the proposal. Proposals not submitted in accordance with the terms, conditions, specifications, and other instructions contained herein may be subject to rejection.</p>		

Definitions

College: Refers to Polk State College.

Evaluation Committee: An independent committee comprised of no less than three members of the Foundation Board and Foundation and College staff. Established to review the proposals submitted in response to a Request for Proposal, score the proposals in accordance with the criteria, and make a recommendation for award.

Foundation: Refers to the Polk State College Foundation, a tax-exempt corporation whose mission is to provide Polk State College with resources for the advancement of the College, its students, faculty, staff, and other constituencies in fulfillment of the College's mission.

Point of Contact: The Foundation staff that will be responsible for all communications and interactions with proposers once the RFP has been posted and until it is closed out as described in the Contact section below.

Project Manager: Polk State College Foundation representative.

Proposer: Firm submitting their credentials in response to a Request for Proposal.

Proposal: Submittals prepared and delivered in response to a Request for Proposal.

RFP: Request for Proposal. A formal request soliciting credentials from qualified firms. Includes specifications or scope of work and all contractual terms and conditions.

General Terms and Conditions

Questions

Any questions or requests for clarifications regarding this Request for Proposal (RFP) during the submittal preparation period (or reporting errors, inconsistencies, or ambiguities) must be submitted via email to foundation@polk.edu using the RFP number as the subject line no later than the date and time listed on Appendix A (Procurement Selection Timeline). No questions or clarifications will be considered after that date and time. Responses will be posted as an addendum and made available on the Polk State College Foundation BidNet account referenced on page three of this RFP.

Addendum

Should any revisions, clarifications, or supplemental instructions be needed, the Foundation will issue a written addendum to all proposers who received an RFP package from Polk State College Foundation. Proposer shall sign, date, and return the acknowledgment page of the latest/final addendum with their proposal. Previous addenda will be deemed received. It is the proposer's responsibility to contact the Foundation in the event that a previous addendum is not received. All proposers should check the Foundation's BidNet account at least seven calendar days before the date fixed for receiving the proposals to ascertain whether any addenda have been issued.

Due Date/Time

The Foundation encourages proposers to ensure delivery of proposals prior to the deadline set for receiving proposals at September 12, 2024 at 4:00 p.m. EDT. Please submit your responses electronically via the Polk State College Foundation BidNet account referenced on page three of this RFP.

Submittal Process

Proposals must be submitted exclusively via the Foundation BidNet account referenced on page three. Any proposal not delivered in this manner will not be considered for evaluation. The Foundation does not accept responses via fax, hard-copy submissions via mail carrier services, or hand-delivered submissions. This measure ensures the security of sensitive information contained within the RFP and streamlines the review process.

Late Submittal

Proposals received after the specified time and date will not be accepted under any circumstance. Be advised that the actual timestamp of the BidNet submission will serve as the determinant for the actual time of receipt. Proposers are encouraged to ensure that submissions are delivered within the specified timeframe to facilitate fair evaluation.

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 reject the proposal of any proposer who has previously failed in the proper performance of an award or to deliver on time contracts or who, in the Foundation's opinion, is not able to perform properly under this award.

Awards

The Foundation reserves the right to make awards at its discretion, prioritizing the best interest of the Foundation. Furthermore, the Foundation reserves the right to reject any and all responses, to cancel a solicitation process at any time, or to waive any minor irregularity or technicality in responses received. In some cases, an award may be based on the top-ranked bidder/proposer and the Foundation being able to agree on final contract terms. If, for any reason, the top-ranked bidder/proposer and the Foundation cannot agree on final contract terms, the Foundation may elect to re-open the solicitation, cancel the solicitation, or award it to the next highest-ranked bidder/proposer in order of ranking.

Retention of Records

Proposer agrees to retain all client records, financial records, supporting documents, statistical records, and any other documents, including electronic storage media pertaining to any contract resulting from this RFP, for a period of five (5) years. Copies of all records shall be made available to the Foundation upon request.

Cost

The Foundation accepts no responsibility for any expenses incurred by those proposers offering their services in the preparation of a response to either this RFP or subsequent requests. All expenses associated with this submittal shall be borne exclusively by the offering proposer.

License and Permits

All entities defined under Chapters 607, 608, 617, or 620, Florida Statutes, seeking to do business with the Foundation shall be on file and in good standing with the Florida Department of State. It shall be the proposer's responsibility to obtain, at no cost to the Foundation, any and all licenses and permits required to complete the contractual services. These licenses and permits shall be readily available for review by the Foundation.

Subcontractors

The proposer is fully responsible for all work performed under the contract resulting from this RFP. The proposer may, upon receiving prior written consent from the Foundation, enter into written subcontract(s) for performance of certain of the proposer's functions under the contract. No subcontract which the proposer enters into with respect to performance of any of its functions under the contract shall in any way relieve the proposer of any responsibility for the performance of its duties.

Substitution of Key Personnel

The successful proposer shall obtain approval from the Foundation prior to reassigning any key staff involved in the

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, with 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 the 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 of 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 the Foundation point of contact.

CCNA

The Foundation reserves the right to proceed to interview without further discussion of submissions received, in accordance with the Consultant's Competitive Negotiation Act (CCNA).

Confidentiality of Information

Subsequent to the execution of an agreement, no reports, information, or data given to or prepared by the successful proposer shall be made available to any individual or organization by the successful proposer without the prior written approval of the Foundation.

Additional Information

No additional information may be submitted, or follow-up performed, by any proposer after the stated due date outside of a formal presentation to the Evaluation Committee, unless specifically requested by the Foundation.

Termination

If the awarded contract is terminated or cancelled within the first year of the contract period, the Foundation may elect to negotiate and award the contract to the next ranked proposer or to issue a new RFP, whichever is determined to be in the best interest of the Foundation.

Governing Law and Venue

Any contract resulting from this RFP shall be governed by the laws of Florida, without giving effect to the choice of laws and principles thereof, and is deemed to have been executed, entered into, and performed within Florida. The parties hereby irrevocably submit to jurisdiction in Florida, and the venue shall lie in the Polk County Courts. The parties hereby waive any objection to such jurisdiction and venue.

Force Majeure

Neither party shall be liable for loss or damage suffered as a result of any delay or failure in performance under the contract resulting from this RFP or interruption of performance resulting directly or indirectly from acts of God, accidents, fire, explosions, earthquakes, floods, water, wind, lightning, civil or military authority, acts of public enemy, war, riots, civil disturbances, insurrections, strikes, or labor disputes.

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

The Foundation does not intend to award contracts to those entities or affiliates who knowingly employ unauthorized alien workers, constituting a violation of the employment provisions as determined pursuant to Section 274A of the Immigration and Nationality Act.

EEO Statement

The Foundation is committed to assuring equal opportunity in the award of contracts and, therefore, complies with all laws prohibiting discrimination on the basis of race, color, national origin, ethnicity, sex, age, religion, sexual orientation, gender identity, marital status, veteran status, genetic information, disability, or pregnancy.

Conflict of Interest

All proposers must disclose with the proposal the name of any officer, director, or agent who is also an employee of the Foundation or Polk State College. All proposers must disclose the name of any employee of the Foundation or the College who owns, directly or indirectly, an interest of five (5) percent or more in the proposer's firm.

Service and Warranty

Unless otherwise specified, the proposer shall define any warranty service and replacements that will be provided during and subsequent to the performance of this contract. Proposers must explain on an attached sheet to what extent warranty and service facilities are provided.

Insurance Requirements

The awarded firm shall purchase all necessary Workers' Compensation Insurance, General Liability Insurance, Automobile Liability Insurance, Professional Liability Insurance, and, where applicable, Public Liability and Property Damage Insurance, with the Foundation included as an additional named insured on the liability insurance policies. All policies should be Occurrence Form only. Certificates of Insurance on all such insurance coverage carried out by the firm shall be furnished to the Foundation. Insurance requirements should be met by insurers authorized to do business in Florida that meet a minimum A.M. Best Company rating of A-VI. Minimum limits for insurance to be provided shall be as follows:

- 1. Public Liability and Property Damage Insurance:** The firm shall purchase and shall require each of the sub-contractors to secure and maintain, during the life of the subcontract, insurance of the type specified herein or insure the activities of their subcontractors in his/her policy as specified.

Commercial General Liability – This policy must be on an occurrence basis; claims made forms are not acceptable.

\$1,000,000 Each Occurrence
\$100,000 Property Damage (Any One Fire)
\$5,000 Medical Payments (Any One Person)
\$1,000,000 Personal & ADV Injury
\$2,000,000 General Aggregate

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 five (5) years after the date of services are performed.

- 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, the 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 Workers' Compensation Law. In case any class of employees engaged in hazardous work under this contract at the site of the project, it is not protected under the Workers' Compensation Statute; the contractor shall provide, and cause each subcontractor to provide, adequate insurance satisfactory to the purchaser, for protection of their employees not otherwise protected.

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

Employer's 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

Waiver of Subrogation Endorsement – Include “Waiver of Subrogation applies.” Certificates evidencing that all the above insurance coverage and limits are in force will be furnished to the Foundation before any services are performed, at all renewal times, and will require written notification to the Foundation at least thirty (30) days prior to any cancellation, termination, non-renewal, or modification. The words “endeavor to” and failure to mail such notice shall impose no obligation or liability of any kind upon the company, its agents or representative should be omitted or lined out on the certificate.

Background

Located in Winter Haven, Florida, and established in 1964, Polk State College is a multi-campus institution serving more than 14,000 students with Bachelor of Applied Science, Bachelor of Science, Associate in Arts, and Associate in Science degrees, as well as 9,000 individuals in a wide range of certificate and workforce training programs. The College also operates three charter high schools.

Polk State's advantages include small class sizes; hands-on learning; dedicated faculty; day and night classes; online options; affordable tuition; excellent financial aid; and a diverse community and vibrant student life, including fine arts opportunities, clubs, and intercollegiate athletics.

The Polk State College Foundation was incorporated in 1976 with the mission to provide Polk State College with resources for the advancement of the College, its students, faculty, staff, and other constituencies in fulfillment of the College's mission.

Polk State College is building a new campus in Northeast Polk County, to ensure access to affordable quality higher education for individuals in the fastest growing part of the county. The Polk State Haines City-Davenport Campus will increase access to higher education for the Polk community, which is the fifth fastest-growing metro area in the U.S. and is projected to expand by another 22% by 2030, with the greatest growth expected in the 18 and younger age group.

The Career and Technical Education and workforce programs offered in this facility will be tailored to meet the current and future employment demands of Polk's Northeast sector, specifically in health sciences, teacher education, hospitality and tourism management, and supply chain and logistics. It will house the first public higher education interdisciplinary simulation hospital in Central Florida and will allow for health sciences program expansion.

The Polk State College Foundation is accepting proposals for a consultant to assist in developing a capital campaign for the new campus. The capital campaign timeline will run for two years as the campus is constructed.

Scope of Work

This Request for Proposal aims to retain an organization, firm, or individual with a proven track record in developing a capital campaign to generate the remaining funding for the Polk State Haines City-Davenport Campus.

Estimated Budget: \$53 million

Sources of Funding Received:

- \$30 million in Legislative funds
- \$3 million from donor

The organization or consultant will create and guide the capital campaign. The Polk State College Foundation anticipates a three-phase project for the campaign.

Phase 1 – Campaign Feasibility

- Conduct a comprehensive assessment and feasibility
- Determine current and potential interest in supporting the campaign
- Evaluate the Foundation’s fundraising capacity, donor base, and infrastructure
- Develop a prospective donor list to include a balance of lead donors, major donors, foundations, and individuals
- Conduct/guide interviews with key stakeholders
- Determine realistic campaign goals, recommended phasing, and project timeline
- Provide a written report of findings and recommended strategies
- Present findings and recommendations to the Foundation staff and Board Members

Phase II – Develop a Campaign Plan and Provide Training

- Develop a written campaign plan that includes funds to be raised, milestones, a timeline, strategies for cultivation/solicitation, stewardship, and a communications plan
 - Explore naming opportunities, make recommendations regarding naming rights, and assist in creating a plan for name recognition.
- Develop a campaign budget, along with the Foundation staff
- Provide Foundation staff, volunteers, and other key institution staff members with training in donor engagement and solicitation
- Assist with implementation, outreach, and communication about the campaign utilizing current Case for Support and collateral materials

Phase III – Campaign Counsel and Major Gifts Cultivation and Solicitation

- Provide strategic counsel throughout campaign planning, implementation, and evaluation
- Drive/support implementation of the campaign strategy

- Provide education and training for support staff and volunteer fundraisers
- Identify, research, and qualify potential major gifts prospects
- Assist in the cultivation and solicitation of major gift prospects
- Advise on campaign proposals, communications, and materials
- Assist in monitoring gift tracking, pledge management, and stewardship in accordance with the plan
- Provide strategies for adjusting the plan as necessary as the campaign progresses

Proposal Submittal Requirements

1. General Proposal Requirements

- a. Proposals shall be signed by an authorized representative of the firm. All information requested must be submitted via (<https://www.bidnetdirect.com/florida/polkstatecollegefoundation>).
- b. Proposals shall be as thorough and detailed as possible so that the committee may properly evaluate the proposer's capabilities to provide the required services. To facilitate analysis of the submittal, the firm must prepare its proposal in accordance with the criteria outlined in the Tab Detailed Information section.
- c. Proposals shall respond to each of the criteria in the same order listed and use the following divider tabs to identify each section.
 1. Letter of Transmittal
 2. Company Information
 3. Financial Information
 4. Experience and Qualifications of the Firm
 5. Experience and Qualifications of Personnel
 6. Resolution of Litigation and Disputes
 7. Scope of Work and Timeline
 8. Cost Proposal
 9. Firm Location
 10. Firm References

Tab Detailed Information

Tab 01 – Letter of Transmittal

Letter of Transmittal: This one-page letter will summarize in a brief and concise manner the proposer's commitment to perform the work in a professional and timely manner. Additionally, include the statement, "**All information submitted is certified to be true and accurate.**" The letter must be signed by an official authorized to make such commitments and legally enter into a contract with Polk State College Foundation and must indicate the official's title or authority.

Tab 02 – Company Information

Provide a brief introduction of the firm submitting the proposal, including its history, date incorporated, current personnel, office location(s), and opening dates.

1. Information about the Proposer: Please complete Appendix B (Proposer Information form) and submit it in this section. W-9 Form: Submit a completed W-9 form: [Form W-9 \(Rev. March 2024\) \(irs.gov\)](https://www.irs.gov/forms/1040-w-9)

2. Drug-Free Workplace: Please complete Appendix C (Drug-Free Workplace form) and submit it in this section. In accordance with Section 287.087 Florida Statutes, whenever two or more proposals are determined to be equal, 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. Explain in detail the principals' interest in this company and the nature of the business.
4. Acknowledgment of Addenda: Include the acknowledgment page (signed and dated) of the last/final addendum issued by Polk State College, if applicable.

Tab 03 – Financial Information

Attach in a password-protected ZIP file complete audited financial statements of the firm's financial condition for the most recent fiscal year. Financial statements that are submitted are exempt from becoming a public record, per Section 119.071(c) Florida Statutes. Email file to jmalone@polk.edu.

Tab 04 – Experience and Qualifications of the Firm

1. Company Credentials: Provide a brief statement of qualifications that includes the firm's size/staffing. Detail any information that would give the proposer an advantage in completing this project.
2. Current and Recently Completed Projects: The proposer should provide examples of projects that are comparable in type, size, and complexity and that best illustrate the experience of the firm and the staff assigned to this project. Include at least two projects.
3. Applicability: The proposer should clearly indicate that the project was awarded to, and performed by, their firm. In addition, please provide the final project cost for each example provided.
4. Proposals submitted by firms under "joint venture" arrangements or other multi-party agreements must submit a power of attorney delegating authority to one principal with authority to negotiate and execute any/all contract documents and amendments resulting from negotiations/award of this RFP.

Tab 05 – Experience and Qualifications of Personnel

1. Provide an organizational chart, as it will relate to this project, indicating key personnel and their assignments and responsibilities. Include photos of key staff, if possible, and indicate which positions are full- or part-time.
2. List of Project Staff: Include a synopsis, in table format, of all personnel who will be assigned to the project. The columns should be titled: Project Position, Employee Name, Current Title, Number of Years with Firm.
3. Credentials: List the experience of each employee within the firm that will be assigned to this project. Include current job description, resume, education/college degrees, licenses, professional certifications, number of years with firm, and whether all experience is while employed by the proposer's firm.

Tab 06 - Resolution of Litigation and Disputes

1. Provide a summary of any litigation, claim(s), or contract dispute(s) which have been finalized/decided by a court of law, which were filed by or against the firm in the past five years. The summary shall include the basis of the lawsuit, litigation, claim, or contract dispute, a brief description of the case, the outcome, and the monetary amounts involved. Exclude lawsuits such as: liens/lawsuits filed by the firm due to non-payment (by a client) after attempts to collect outstanding accounts receivable have been unsuccessful, third-party lawsuits where the firm was dismissed from the case because it was not directly involved, landlord/tenant lawsuits, cases where the firm was granted summary judgment and released from the lawsuit, improper termination of employment, and negligence cases such as a slip-and-fall on the firm's office premises.
2. Provide any information with regard to the firm's involvement in any potential or pending litigation.
3. Disputes Disclosure Form: Please complete Appendix D (Dispute and Disclosure Form) and submit it in this section.

Tab 07 – Scope of Work, Timeline.

1. Provide a detailed description of the project approach, including significant phases and deliverables (i.e., describe your feasibility study process, including the duties the firm will perform and those expected to be completed by the Foundation Board, the Vice President of Resource Development & Executive Director of the Foundation, or other leadership. Additionally, specify the information and recommendations that will be included in the feasibility study report.
2. Provide a detailed and strategic timeline for the capital campaign, outlining key milestones, deadlines, and deliverables to ensure timely execution and successful fundraising outcomes.

Tab 08 – Cost Proposal

1. State the total hours and hourly rate required by staff classification and the resulting all-inclusive lump-sum fee, including out-of-pocket costs for which the requested work will be done.
2. Any costs and expenses for research, market analyses, marketing materials, compensation of salespeople, preparation of marketing materials, consulting expenses, and travel, are the sole responsibility of the consultant.

Tab 09 – Firm Location

Provide a simple map that shows the proposer’s location relative to the College’s Winter Haven Campus. Maps are available at www.mapquest.com or maps.google.com.

Identify the location of the specific office that will have direct responsibility for this project, including the county where this office is located and the number of miles and drive time to/from the College’s Winter Haven Campus. Points will be awarded based on the proximity of the specific office having direct responsibility for this project:

Location	Points
Polk County	5
Bordering County (Hardee, Highlands, Hillsborough, Lake, Osceola, Orange, Pasco, or Sumter)	4
Florida, excluding the above locations	3
Outside of Florida	2

Tab 10 – Firm References – Continental United States, Hawaii, and Alaska only

1. Provide at least three (3) references, Appendix E. If possible, include reference letters from each client. Do not include Foundation staff or Foundation Board members as references.
2. The Evaluation Committee considers both the information provided by the references and the percentage of replies received.

Evaluation of Criteria

The Evaluation Committee will evaluate the written proposals to determine who to shortlist and interview based on the proposal evaluation criteria below. After the evaluation process, those firms presenting the most responsive statements will be shortlisted and asked to present a personal interview before the Evaluation Committee.

The Foundation reserves the right to accept or reject any proposal in the best interest of the College.

The Foundation reserves the right to award the contract to the next most qualified firm if the successful firm does not begin the contractual services within 15 days of signing the contract and/or if an acceptable fee cannot be negotiated.

The evaluation criteria will be based on a consensus scoring method among the Evaluation Committee members. The

proposals will be ranked highest to lowest with a total maximum score of one hundred based on the following criteria:

Criteria	Points
Assessment of firm experience & qualifications with similar projects.	20
Proposed methodology for completing project phases, deliverables, and timeline.	20
Expressed understanding of the project, key objectives, and associated risks.	20
Team experience and qualifications with similar projects.	20
Assessment of overall project cost estimate on a comparative basis to other submitted proposals.	15
Location	5
Total Available Points	100

Selection Process

1. Shortlisting

The written proposals received in response to this RFP will be evaluated and ranked by the Evaluation Committee comprised of not less than five voting members in accordance with the process and evaluation criteria and utilizing the attached ranking sheet. Various (non-competing) professional consultants and representatives from the Foundation may also be present during this process as non-voting members of the committee. A ranking shall be established by totaling the sum of the scores given to each proposer by all voting members of the Evaluation Committee. The committee has the option to select (shortlist) and/or award a minimum of two proposers who may give a presentation at a later date to the Evaluation Committee.

No information will be released by the Foundation after the due date for submission of the proposals until the selection of the shortlisted firms has been made. All submitting firms will receive notification of the proposers selected. The ranking established for shortlisting will not carry forward to the next portion of the process. In accordance with the CCNA, the Foundation reserves the right to conduct or not conduct interviews at its sole discretion.

Non-responsive proposals will be rejected by the Foundation and will not be distributed to the Evaluation Committee for consideration. Additionally, the Evaluation Committee may determine that one or more required submittals or documentation are so inadequate as to be determined to be non-responsive. A proposal may be non-responsive due to:

- a. Late submission
- b. The proposer does not meet minimum requirements
- c. Failure to follow the required format listed
- d. Failure to sign the proposal
- e. Failure to acknowledge addenda (unless all changes are not material, e.g., extending the due date)
- f. Failure to provide required submittals/documentation
- g. Failure to register as a prospective submitting firm

The list of shortlisted proposers will be posted on the dedicated webpage.

2. 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.

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 date 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:

- a. Drug-Free Workplace (Appendix C)
- b. Proposer’s place of business is within Polk County
- c. Proposer’s place of business is within the State of Florida
- d. Prompt Payment Discounts
- e. Flip coin

7. Evaluation Criteria Rating Sheets

The Evaluation Committee will review the proposals received in response to this RFP based on the evaluation criteria included in this document. The Evaluation Committee will utilize the attached Evaluation Rating Sheets for both the shortlisting and oral 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 proposer, determined 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 top-ranked firm. Failure to complete negotiations with the firm ranked first will result in negotiations with the next highest ranked firm, in order of ranking. The contract will become binding upon approval by the appropriate level of authority within the Foundation and executed by the parties.

The process will be in accordance with FS 287.055, the Consultants’ Competitive Negotiation Act (CCNA).

Exclusive Rights

The contract will NOT grant exclusive rights to all service requirements of the Foundation.

Important Notice

Proposers are required to complete all appendix forms as part of the RFP submission process, except for the Woman, Minority, Veteran-Owned Business Statement (Appendix H), which should only be completed if applicable.

AFFIRMATION

By submission of a proposal, the proposer affirms that their proposal is made without prior understanding, agreement or connection with any corporation, firm, or person submitting a proposal for the same materials, supplies, equipment, or services and is in all respects fair and without collusion or fraud. The proposer agrees to abide by all conditions of this RFP and the resulting contract.



SELECTION CRITERIA RATING FOR WRITTEN PROPOSAL	
RFP #24-01	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 capital 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 a capital campaign.	20	
Understanding of Project, objectives, and risks: The firm thoroughly understands the project's objectives and potential risks, which is evident in its detailed proposal. The identification of key milestones and critical success factors highlights the firm’s ability to anticipate and mitigate risks effectively. This depth of understanding ensures that the firm is well-prepared to navigate any obstacles that may arise, fostering confidence in its ability to deliver successful outcomes.	20	
Team Experience & Qualifications: The assigned team demonstrates exceptional experience and qualifications, making it well-suited for a capital campaign. Each member brings a wealth of knowledge and a proven track record of success in similar projects. Their collective expertise in strategic planning, donor engagement, and innovative fundraising techniques reflects their ability to consistently meet and exceed fundraising goals.	20	
Proposal Cost: The cost is competitive and reflects a clear understanding of the project's scope and financial constraints. The cost proposal balances affordability with high quality, indicating that the firm is committed to delivering exceptional value. This thoughtful and reasonable pricing instills confidence in the firm's ability to execute the project efficiently while staying within budget.	15	
Location: As described on page 12.	5	
Total Score:	100	

Scorer Printed Name:

Scorer Signature:

Date:



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 below.

Evaluation Criteria	Maximum Points	Awarded Points
Experience in Capital Campaigns: The firm displays extensive expertise in capital campaigns within the non-profit sector. Their track record includes successfully surpassing fundraising goals for various organizations and demonstrating a deep understanding of donor engagement and strategic planning. The firm stands out for its comprehensive approach to capital campaigns, delivering measurable results and fostering long-term donor relationships.	5	
Examples of other similar engagements: The examples of similar educational capital campaign engagements were insightful. They provided valuable context for the firm's expertise and highlighted its ability to effectively navigate complex fundraising environments to achieve outstanding results for a capital campaign.	5	
Presentation Questions and Answers: The proposer thoroughly and satisfactorily answers the questions asked during the presentation/demonstration.	5	
Overall Presentation: The presentation showcased clarity, relevance, professionalism, and understanding of the Foundation's fundraising needs. The information provided was relevant to the Foundation's requirements and effectively communicated.	5	
Total Score:	20	

Evaluation Rating Criteria for each item (Presentation, experience, examples, and answers):

Rating (1-5):	Basis for Scoring:
1	Non-responsive. Inadequate material/information. Unsatisfactory presentation.
2	Presentation provided complies but is lacking or unsatisfactory in some way.
3	Adequate, satisfactory, or good presentation.
4	Very good presentation. Reflects a distinct advantage or benefit to the owner.
5	Outstanding presentation. Superior characteristic, feature, and/or offer.

Scorer Printed Name:

Scorer Signature:

Date:

Appendices List

Appendix	Type	Description
A	Informational	Procurement and Selection Timeline
B	Required	Proposer 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 # 24-01	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 Short-Listed 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 # 24-03	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): <i>Only required if FEIN is not provided</i>	
Incorporated in the State of:	Year:	
General License #:		
Available Bonding Capacity: \$	Aggregate: \$	Single Project Limit: \$
Surety Company:	A.M. Best Rating:	

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 287.087, hereby certifies that

_____ does:
(Company Name)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the proposed commodities or contractual services a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (2), notify the employees that, as a condition of working on the commodities or contractual services that are underbid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five days after such conviction.
5. Impose a sanction on or require satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
6. Make a good-faith effort to continue to maintain a drug-free workplace through the implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements and agree and understand that any misstatement, misrepresentation, or falsification of facts shall be cause for forfeiture of rights for further consideration of this procurement.

Authorized Signature (Officer)

_____ Date

_____ Printed or Typed Name

_____ Title

Appendix D

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

DISPUTE AND DISCLOSURE FORM

Please answer the following questions by checking the box after "YES" or "NO." If you answer "YES," please explain via attachment.

Disclosure can be limited to the regional/district office supporting this contract.

YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>Has your firm or any of its officers received a reprimand of any nature or been suspended by the Department of Professional Regulation or any other regulatory agency or professional association within the last five years?</p>
YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>Has your firm, or any member of your firm, been declared in default, terminated, or removed from a contract or job related to the services your firm provides in the regular course of business within the last five years?</p> <p style="text-align: center;">If yes, indicate company name, contact name, and telephone number, length of service provided, and reason for early cancellation/termination of contract.</p>
YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>Has your firm filed against it or filed any requests for equitable adjustment, contract claims, or litigation in the past five years that are related to the services your firm provides in the regular course of business?</p> <p style="text-align: center;">If yes, state the nature of the request for equitable adjustment, contract claim, or litigation, a brief description of the case, the outcome or status of the suit, and the monetary amounts involved.</p>

I hereby certify that all statements made are true and agree and understand that any misstatement, misrepresentation, or falsification of facts shall be cause for forfeiture of rights for further consideration of this procurement:

Authorized Signature (Officer)

Date

Printed or Typed Name

Title

Appendix E

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

REFERENCES			
Proposer (Company) Name: _____			
Client Name / Address	Contact Person	Telephone and Email	
	Name:	Phone:	
		Toll Free:	
		Email:	
	Name:	Phone:	
		Toll Free:	
		Email:	
	Name:	Phone:	
		Toll Free:	
		Email:	
	Name:	Phone:	
		Toll Free:	
		Email:	

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) _____ of (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 of all pertinent circumstances respecting such bid.

Neither the said proposer nor any of its officers, partners, owners, agent representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly, sought by 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 overhead, profit or cost element of the proposal price or the proposal price of any other proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Polk State College Foundation.

The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affidavit.

Authorized Signature (Officer).

Date

Printed or Typed Name

Title

END OF REQUEST FOR PROPOSALS PACKAGE