



Request for Proposals
Statewide Community Needs Assessment
State of Montana

Montana Community Action Network
Also known as Montana HRDC Director's Association
Montanacommunityaction.org

INTRODUCTION

The Montana Community Action Network (referred to in the rest of the document as “the Association”) started in 1977 and represents the ten community action agencies in Montana. The Montana Community Action Network (MTCAN) works to strengthen the network of Community Action Agencies of Montana through advocacy, collaboration, and resource development. President Lyndon B. Johnson initiated the Community Action Program through the Economic Opportunity Act of 1964 in what is often referred to as the “War on Poverty.” For 60 years, Community Action Agencies (CAA) across the United States have responded to the mandate of eliminating poverty by offering a vast array of social services to address poverty in a comprehensive way. CAA programs and services to Montana residents with low income include but are not limited to:

- Asset Development
- Employment Training
- Health
- Nutrition
- Strengthening Families
- Child Care & Youth Development
- Energy Assistance & Weatherization
- Housing
- Seniors
- Transportation

Programs available at each agency vary; for a more complete list of programs, visit our association [website](#) where you can also link to our member websites. Funding for CAAs comes from various local, state and Federal sources, as well as from private individuals, organizations and foundations.

As recipients of the Community Service Block Grant, administered and distributed through the State of Montana’s Department of Public Health and Human Services (DPHHS), each regional Community Action Agency must complete a comprehensive Community Needs Assessment (CNA) every three years to meet federal requirements associated with the block grant. To align these efforts, and to limit the burden on regional offices, the Association and DPHHS leadership developed a plan to standardize the CNA methodology for use across all CAAs.

INVITATION TO BID

The Association invites interested parties to submit a proposal to develop a scientifically rigorous and statistically relevant CNA survey intended as a foundational document for use by all ten of Montana’s Community Action Agencies. The selected party will further work with all ten Community Action Agencies to create additional area-specific questions for their regions. The selected party will create a template of sample questions that Community Action Agencies can ask focus groups when conducting CNAs.

PURPOSE

The Foundational Community Needs Assessment Survey will assist the agencies in strategic planning and programming decisions related to: relevancy of programming, service delivery and design, resource allocation, and geographic distribution of services. This survey, when performed in tandem across the entire state, will provide the very first metrics for comparable statewide CNA data and create a snapshot of poverty across the state of Montana.

SCHEDULE OF EVENTS

Release of RFP:	03/19/2024
Deadline for Submission:	05/03/2024
Determination of Award:	06/03/2024

INQUIRIES

Questions regarding this RFP are to be submitted by email to Association Executive Director Katie McLain at katiemclain@gmail.com with "Community Needs Assessment Questions" in the subject line. Responses to all questions will be posted to Montanacommunityaction.org or answered on an individual basis as appropriate.

PROCESS FOR SUBMITTING PROPOSAL

Proposals must be submitted to katiemclain@gmail.com via email with "Community Needs Assessment Proposal" in the subject line by 05/03/2024. Proposals received after the deadline will not be considered. In the event that the Association does not receive enough proposals, an extension may be provided at the Association's discretion. This proposal offer acknowledges the right of the Montana Community Action Network to accept or reject any or all proposals and to waive any informality in any proposal received.

Deadline: **05/03/2024**
NO LATE PROPOSALS ACCEPTED

E-Mail to: katiemclain@gmail.com

Subject: **Community Needs Assessment Proposal**

SCOPE OF SERVICES

The Statewide Community Needs Assessment will be a collaborative effort. Offerors will participate in regular updates and reviews with designated representatives of each agency, serving in the capacity of Community Needs Assessment Project Manager. An initial meeting with the Association board and DPHHS, both of whom will guide the process, will also be required. Through this meeting, Association members will assist in collecting pertinent data and developing focus group guiding questions. The full draft of the document will also be presented to The Association board for review and comment.

PROJECT PHASES

Part 1 – Project Introduction

The winning Offeror (Contractor) will meet with The Association Board and DPHHS within 30 days of contract award to:

- Define the broader framework of community needs and assets the Agencies wish to assess,
- Discuss organization of data, and
- Agree upon the process for compiling information.

The Contractor will meet with the Association's Executive Director as necessary to understand and assess Agency-derived data from previous community needs assessments, customer data and other relevant data sources. The Agencies are looking forward to a collaborative process to ensure all voices are heard and acknowledged.

Part 2 – Survey Design

As Federal Community Service Block Grant recipients, each CAA is required to complete a comprehensive needs assessment every three years. With this first RFP, the ten agencies have agreed to collaborate on a single foundational survey performed in synchronization by the entire

state, which will be repeated every three years. To meet all the Agency's needs, the survey must consist of questions at both the family and community level pertaining to:

- Employment
- Income
- Access to affordable housing
- Access to food and nutrition
- Ability to pay utilities
- Access to health care
- Access to mental health care
- Education
- Access to childcare
- Access to senior services
- Legal needs
- Community engagement/isolation
- Child abuse and neglect
- Transportation

Furthermore, the Contractor will create a template of sample questions that Community Action Agencies can ask focus groups when conducting CNAs for the purpose of collecting qualitative information on the areas of the survey's inquiry.

Part 3 – Client Input

The Contractor will meet with either the ED, the Association as a whole, or individual members of the Association to collect client feedback over email, phone, or zoom for purposes of the foundational survey, focus groups questions, and for the design of regional specific questions.

Part 4 – Final document delivery

The Contractor will provide a full draft of all documents for the Association board to review and edit within the designated timeline. After the final edits have been submitted by The Association, the final version of the document will be submitted by the agreed upon completion date and time. The final document will be presented to the Association board and DPHHS (in person or via zoom) on the designated date and time.

The draft and final documents shall include:

- A foundational Community Needs Assessment Survey
- Regional specific survey questions for each of the ten Community Action Agencies
- A template of sample focus group questions
- Additional sections as agreed upon

RESOURCES

Offerors are encouraged to view the following resources:

Community Action Partnership – CAA Community Needs Assessment Resource Guide

https://communityactionpartnership.com/publication_toolkit/community-needs-assessment-resource-guide/

OFFEROR QUALIFICATIONS

To enable the Association to determine the capabilities of an Offeror to perform the services

specified in the RFP, the Offeror shall respond to the following regarding its ability to meet the Association's requirements.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

1. Company Profile and Experience

Offeror shall provide documentation establishing the individual or company submitting the proposal has the qualifications and experience to provide the services specified in this RFP, including, at a minimum:

- 1.1. A detailed description of any similar past projects, including the service type and dates the services were provided;
- 1.2. The client for whom the services were provided;
- 1.3. A general description of the agency including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this RFP; and
- 1.4. Service delivery approach, including approaches for rural vs. urban areas.

2. Understanding of Community Action Agency Community Needs Assessments

- 2.1. Describe your experience working with Community Action Agencies, including any work within Montana specifically.
- 2.2. Describe any experience with Community Needs Assessments, including work in Montana and with CAA specifically.

3. Delivery of products and services

- 3.1. Describe expertise in gathering qualitative and quantitative data, interpretation, analysis, and communicating findings.
- 3.2. Describe experience in conducting focus groups.
- 3.3. Describe how the Offeror evaluates the success of their products and services.
- 3.4. Describe the plans to meet the Scope of Work as mentioned above.

4. Staffing Approach

- 4.1. Include a description of the overall staffing plan with proposed FTEs and location of FTEs, a description of the Offeror's staffing and resource estimate approach and its ability to make staffing, resource adjustments as needed. Include proposed subcontractor information to include name, address, the general scope of work to be performed by each subcontractor, its willingness to perform such work, and certification that does not discriminate in its employment practices.

5. References

Offeror shall provide a minimum of two (2) references that are currently using or have previously used services of the type proposed in this RFP. The references may include state, county, or city governments, universities, or Community Action Agencies for whom the Offeror, preferably within the last five (5) years, has successfully provided products or services relating to Community Needs Assessment. At a minimum, the Offeror shall provide

the company name, location where the services were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the services provided, and dates of service. These references may be contacted to verify Offeror's ability to perform the contract. The Association reserves the right to use any information or additional references deemed necessary to establish the ability of the Offeror to perform the contract. Negative references may be grounds for proposal disqualification.

6. Resumes

A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subcontractors, who will be performing any aspect of the contract. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this RFP.

COST PROPOSAL

The Offeror's cost proposal will be used as the primary representation of each Offeror's cost and will be used extensively during proposal evaluations. Additional information should be included as necessary to explain in detail the Offeror's costs. Cost proposals must also contain all information identified below:

1. Itemized Budget with Narrative Justification

The cost proposal must be submitted in a separate document from the technical, and shall contain the budget, budget narrative justification, and staffing plan.

2. Budget Narrative:

- Budget narrative must be provided for each line item which describes, explains, and justifies in full sentences the inclusion of the line item.
- Be sure to include specifics of the Budget which would be relevant to that function but summarized in a budget line with a more generic name.
- When justifying a line item, use a description of the purpose as well as background calculations related to the resultant amount shown in the budget.
- In the narrative, the Offeror is invited to provide any assumptions that the Offeror used in developing the cost proposal. However, this invitation does not permit Offeror to change the format of the annual budget worksheet or to fail to include all information requested in the annual budget in the RFP attachment.

EVALUATION PROCESS

BASIS OF EVALUATION

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of **1,000** points.

Achieve Minimum Score

Any proposal that fails to achieve eighty percent (80%) of the combined points available for Provision of Services, Company Profile and Experience will be eliminated from further consideration. A "fail" for any individual evaluation criteria may result in proposal disqualification at the discretion of the procurement officer.

SCORING GUIDE

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the Association.

Good Response (75-94%): A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The Offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The Offeror has not demonstrated sufficient knowledge of the subject matter.

EVALUATION CRITERIA

Evaluated RFP Section	Point Values
OFFEROR QUALIFICATIONS	80% of points for a possible 800 points
1. Company Profile and Experience	20% of points for a possible 200 points
1.1. A detailed description of any similar past projects, including the service type and dates the services were provided;	50
1.2. The client for whom the services were provided; and	50
1.3. A general description of the agency including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this	50

RFP.	
1.4. Service delivery approach, including approaches for rural vs. urban areas	50
2. Understanding of Community Action Agency Community Need Assessment; clear, detailed, complete	20% of points for a possible 200 points
2.1 Describe your experience working with Community Action Agencies, including any work within Montana specifically.	100
2.2 Describe any experience with Community Needs Assessments, including work in Montana and with CAA specifically.	100
3. General vision for delivery of products and services; clear, detailed, complete	30% of points for a possible 300 points
3.1 Describe expertise in gathering qualitative and quantitative data, interpretation, analysis, and communication of findings	75
3.2 Describe experience in conducting focus groups	75
3.3 Describe how the Offeror evaluates the success of their products and services.	50
3.4 Describe the plans to meet the Scope of Work as mentioned above.	100
4. Staffing Plan	10% of points for a possible 100 points
4.1. Include a description of the overall staffing plan with proposed FTEs and location of FTEs, a description of the Offeror's staffing and resource estimate approach and its ability to make staffing, resource adjustments as needed. Include proposed subcontractor information to include name, address, the general scope of work to be performed by each subcontractor, its willingness to perform such work, and certification that does not discriminate in its employment practices.	100
References	Pass/Fail
Complete contact information provided.	P/F
Resumes	Pass/Fail

Key Personnel resume, including summary of qualifications, work experience, education and skills	P/F
Cost Proposal	20% of points for a possible 200 points
Reasonable and prudent based on accuracy and completeness of the Projected Budget Worksheet which includes the following sections:	
Budget	100 points
Narrative	100 points

Lowest overall administrative cost ratio receives the maximum allotted points. All other proposals receive a percentage of the points available based on their administrative cost ratio relationship to the lowest. Example: Total possible points for cost are 200. Offeror A's administrative cost ratio is 8%. Offeror B's administrative cost ratio is 12%. Offeror A would receive 200 points. Offeror B would receive 133 points because $8\%/12\% = 66.7\%$. $66.7\% \times 200 \text{ points} = 133$.

EXECUTION OF CONTRACT

The Association reserves the right to consider proposals based on their relative merit, risk, and value to the organization, and reserves the right to reject any and all proposals, and negotiate with all service providers. A negotiated contract for accepted proposal will be based upon the factors described in this RFP. Contracted service offers will be based upon the Offeror's responsiveness to the RFP and total price quoted for all items covered by the RFP. The successful Offeror may be asked to participate in negotiations and may be asked to make revisions to their proposals based on negotiations. In submitting a proposal, each Offeror acknowledges that they have read and understand these requirements.