



AREA AGENCY ON AGING

Ohio District 5 | Serving North Central Ohio

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Grants Management Organizational Structure Request for Proposal

January 24, 2024

Ohio District 5 Area Agency on Aging, Inc.

Request for proposal for grants management organizational structure review and workflow.

Inquiries and proposals should be directed to:

Name:	Diane Ramey
Title:	Chief Clinical Officer
Entity:	Ohio District 5 Area Agency on Aging, Inc.
Address:	2131 Park Avenue West Ontario, Ohio 44906
Phone:	567-247-3453

Please consider sending your completed request for proposal (RFP) to Ohio District 5 Area Agency on Aging, Inc.

Email the RFP to Diane Ramey dramey@aaa5ohio.org.

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General information

A. Purpose

Ohio District 5 Area Agency on Aging, Inc. (AAA5) is initiating this request for proposal (RFP) from consultants interested in contracting to assess and design for grants management organizational structure. The prospective vendor should be prepared to assist AAA5 with evaluating our current grants management organizational structure to:

- 1) Improve grants management overall.
- 2) Create the infrastructure necessary for growth, expansion, and better alignment.
- 3) Enable decision-making and effective communication.
- 4) Be responsive to a dynamic landscape. AAA5 is committed to establishing grants management organizational structure to inspire collaboration, inspiration and productivity when serving our communities.
- 5) Make recommendations for IT software that may enhance grant management work. IT platforms are secondary to the organizational grants management structure.

B. Who may respond

Only qualified organizations or individuals with experience working with grant-funded programs may respond to this RFP.

C. Instructions on proposal submission

1. **Closing submission date:** Proposals must be submitted no later than 4:30 p.m. (Eastern Standard Time) on February 23, 2024.
2. **Inquiries:** Inquiries concerning this RFP should be directed to Diane Ramey, LSW 567-247-3453, dramey@aaa5ohio.org. Offerors may direct questions via email, a phone call or an in-person meeting. All questions and responses will be visible to all participating bidders on the FAQ page found on our website: www.aaa5ohio.org.
3. **Conditions of proposal:** All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the offeror and will not be reimbursed by Ohio District 5 Area Agency on Aging, Inc.
4. **Instructions to prospective contractors:**

Your proposal should be addressed as follows:

Name: Diane Ramey
Title: Chief Clinical Officer
Entity: Ohio District 5 Area Agency on Aging, Inc.
Address: 2131 Park Ave. West, Ontario, Ohio 44906

- 5. **Proposal submissions:** Proposals are due by 4:30 p.m. (Eastern Standard Time) on *February 23, 2024*. It is the responsibility of the offeror to ensure that the proposal is received by Ohio District 5 Area Agency on Aging, Inc. by the date and time specified. Late proposals will not be considered.
 - a. **Electronic submission:** Proposals can be submitted electronically to the following email address: dramey@aaa5ohio.org by 4:30 p.m. Eastern Standard Time on February 23, 2024.

Request for Proposal
4:30 p.m. Eastern Standard Time February 23, 2024,
Proposal for grants organizational structure review and design

- 6. **Right to reject:** Ohio District 5 Area Agency on Aging, Inc. reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based on the factors described in this RFP.
- 7. **Notification of award:**
 - a. It is expected that a decision about selection of the successful offeror will be made within two weeks of the closing date for the receipt of proposals.
 - b. Upon conclusion of final negotiations with the successful offer, all offerors submitting proposals in response to this RFP will be informed, in writing, of the name of the successful offeror.

D. Description of entity

Ohio District 5 Area Agency on Aging, Inc. is a nonprofit organization that serves primarily nine counties in Ohio. AAA5 is a private, nonprofit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. It is governed by a 15-member volunteer board of trustees. Administrative offices and all records are located at 2131 Park Ave West, Ontario, Ohio 44906. AAA5 has 125 full-time employees and 6 part-time employees, for a total of 131 employees.

Over the past five years our grants management has been the responsibility of several team members with no clear process or structure on how grants are managed. Our intent is to create a structure that provides alignment with managing all grant funds to ensure consistency in applying, tracking, utilization, and reporting grant activity.

Fitting within the scope of this project is approximately five grant funded programs.

Specification schedule

A. Scope of services

Based upon our needs, we request the following scope and approach:

1. Gather and review materials to ensure understanding of the current grant management organizational structure and process.
2. Facilitate individual interviews with Division Chiefs, leadership, fiscal and key grant management employees to ensure wide representation of thoughts and opinions are received.
3. Prepare alternative grants management organizational structure with two or three recommendations including, but not limited to, the scope of work for positions identified to carry out the work.
4. Identify internal dynamics that may prevent structure changes.
5. Identify any workflow challenges or changes needed to be made.
6. Facilitate a virtual presentation to debrief and discuss recommendations.

These steps culminate into a new or updated grants management organizational structure. The chosen offeror will facilitate the entire process, which may be facilitated by the entity in future years.

B. Delivery schedule

The offeror is to transmit one copy of the draft report to Diane Ramey, dramey@aaa5ohio.org. The draft report is due close of business on June 14, 2024

If needed, the offeror shall deliver (3) final reports to Ohio District 5 Area Agency on Aging, Inc. no later than June 24, 2024.

C. Pricing

The offeror's proposed price for services should include a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated.

D. Payment

Payment terms will be agreed upon with the offeror.

E. Confidentiality

The offeror agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to Ohio District 5 Area Agency on Aging, Inc., the offeror agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the offeror's possession, to those employees on the offeror's staff who must have the information on a "need to know" basis.

The offeror agrees to immediately notify, in writing, Ohio District 5 Area Agency on Aging, Inc.'s authorized representative in the event the offeror determines or has reason to suspect a breach of this requirement.

Technical qualifications

The offeror, in its proposal, shall, as a minimum, include the following:

A. Understanding our needs

The offeror should describe the current challenges and opportunities specific to our organization. Describe how your firm is best suited to assist our organization in facing those challenges and opportunities moving forward.

B. Understanding the scope of work

The offeror should clearly describe the scope of work to be performed in alignment with this RFP.

C. Understanding our industry

The offeror should describe its understanding of our industry by providing specific industry knowledge and expertise, including:

1. Prior experience working with nonprofit organizations.
2. Prior experience consulting with organizations similar to AAA5.
3. Prior experience providing additional services to organizations similar to AAA5.

D. Engagement team

The offeror should briefly describe the qualifications of the staff to be assigned to the engagement. Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members. Team bios should include education and position in the organization.

E. Organization, size, and structure

The offeror should describe its organization, size (in relation to work to be performed) and structure. Description should include:

1. Size of the offeror, including number of employees.
2. Explanation of independence.
3. Any conflicts of interest that exist.

F. Approach to the engagement

The offeror should describe its approach to the work to be performed to include a timeline.

Proposal evaluation

A. Nonresponsive proposals

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal was not received in a timely manner in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers that the proposed undertaking would comply with requested work.

B. Proposal evaluation

Evaluation of each proposal will be scored on the following six factors.

	Point Range
1. Understanding our needs	0-5
a. Understanding our current challenges and opportunities	
b. Firm's approach to addressing our challenges.	
2. Understanding our industry	0-20
a. Prior experience working with nonprofit organizations.	
b. Prior experience consulting with organizations similar to AAA5.	
c. Prior experience providing additional services to organizations similar to AAA5.	
3. Organization, size, and structure of offeror's firm	0-5
a. Adequate size of the firm	
b. Expertise within the nonprofit sector	
4. Qualifications of staff to be assigned to be performed.	0-2
a. This will be determined from résumés submitted. Include education, position in firm, and years and types of experience.	
5. Offeror's approach to the engagement	0-30
a. Comprehensive methodology.	
b. Inclusive approach to gather multiple perspectives.	
c. Seeks to understand and support the team and organization.	
d. Works in partnership with project team	
e. Leverages knowledge and experience from work with similar organizations.	
f. Collaborates with key leadership to achieve the desired outcomes.	
g. Realistic engagement timetable.	
6. Price	0-20

Maximum points

100

C. Review process

AAA5 may, at its discretion, request presentations by or meetings with any or all offerors to clarify or negotiate modifications to the offerors' proposals.

However, AAA5 reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the offeror can propose.

AAA5 contemplates award of the contract to the responsible offeror with the highest total points.

Appendix

A. Sample proposal evaluation

Total points will be calculated by a review committee who will provide a total point value for each responding offeror. The offeror, meeting all of the outlined criteria, that also accumulates the highest total point value will be awarded the contract.

Proposal evaluation		
	Point range	Points earned
Understanding our needs Understanding our current challenges and opportunities Firm's approach to addressing our challenges	0-5	
Understanding our industry Prior experience working with nonprofit organizations Prior experience and consulting with organizations similar to AAA5 Prior experience providing additional services to organizations similar to AAA5	0-20	
Qualifications of staff to be assigned to the project Prior experience of the individual consulting team members	0-20	
Organization, size and structure of offeror's firm Adequate size of the firm Expertise within the nonprofit sector	0-5	
Offeror's approach to the engagement Comprehensive methodology Inclusive approach to gather multiple perspectives Seeks to understand and support the team and organization Works in partnership with project team Leverages knowledge and experience from work with similar organizations Collaborates with key leadership to achieve the desired outcomes Realistic timetable	0-30	
Price	0-20	
Total points	0-100	