



Request for Proposals (RFP)

Nonprofit Management Services

RFP#2023-001

Please read this RFP thoroughly and carefully! Failure to follow the directions outlined herein may result in your firm's disqualification from consideration.

Date Issued: 8/23/2023

Submission Deadline: 10/2/2023

Summary:

The Yadkin-Pee Dee Water Management Group ("YPDWMG") is seeking professional nonprofit management services for the administration and management of the YPDWMG 501(c)(3) nonprofit organization.

YPDWMG is a collaborative effort between governmental, public water utility, and reservoir operator parties providing service within the Yadkin-Pee Dee Basin of North and South Carolina. The purpose of the organization is to enhance the welfare of Yadkin-Pee Dee residents by jointly planning for the sustainable use of water from the Yadkin-Pee Dee River Basin.

The organization previously operated under a Memorandum of Understanding organizational structure, but is now legally incorporated as a 501(c)(3) organization.

YPDWMG seeks a highly qualified firm to perform nonprofit management services on its behalf. The selected firm will enter into a one-year contract with YPDWMG with the option to renew annually for four additional one-year periods provided the selected firms and the YPDWMG, its officers, and members agree and funds are available for the contract.

Direct all inquiries concerning this RFP to:

Drew Finley (Project Manager, Fountainworks)

drew@fountainworks.com | 704-787-6036



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Introduction

The Yadkin-Pee Dee Water Management Group (“YPDWMG”) was developed through a collaborative effort by a workgroup of eighteen governmental, public water utility and reservoir operator parties providing service within the Yadkin-Pee Dee Basin. The discussions began in 2015 and progressed to a formal organization being formed in 2016.

YPDWMG provides a structure for regional collaboration that can coordinate activities and explore mutually beneficial ways to protect and develop the water supply. Regional collaboration by water supply managers is one step towards the Group’s goal, which is to enhance the welfare of Yadkin-Pee Dee residents by jointly planning for the sustainable use of water from the Yadkin-Pee Dee River Basin.

YPDWMG members work together to evaluate and plan for the water supply of the Yadkin-Pee Dee River Basin. The Group has a goal of defining the basin’s role in a long-term sustainable and secure regional water supply for the Yadkin-Pee Dee region, as well as operating under the principles of regional collaboration, sustainable water supply, environmental stewardship, mutual and collective benefit, shared responsibility, equal representation, and financial stability.

Please visit the YPDWMG website (<http://www.ypdwater.org/>) to learn more about the organization.

The organization’s transition from a Memorandum of Understanding structure to an incorporated nonprofit marks a key inflection point for YPDWMG. A major driver for this change was the organization’s desire to be eligible for more external funding opportunities such as grants. As such, it is critical that YPDWMG identifies a highly qualified firm who will competently manage all aspects of the nonprofit organization.

The selected firm will perform professional nonprofit management services for the YPDWMG nonprofit organization. These services will include the administration and management of the YPDWMG nonprofit organization at the direction and guidance of YPDWMG, its officers, and members. The selected firm will successfully demonstrate its ability to perform the tasks outlined in the Scope of Work. Firms will be evaluated on the basis of the Evaluation Criteria specified herein.

Scope of Work

The Yadkin-Pee Dee Water Management Group (“YPDWMG”) is seeking professional nonprofit management services for the administration and management of the YPDWMG 501(c)(3) nonprofit organization. This work will include, but will not necessarily be limited to, the following tasks:

1. Comprehensive fiduciary administration and management of the YPDWMG nonprofit organization
 - a. Maintenance and recordkeeping of all financial documents and records of the organization in compliance with applicable law. Specific experience with the administration and management of 501(c)(3) nonprofit organizations is strongly preferred. Specific public water sector knowledge and experience is preferred. Experience with grant writing and grant identification is required.
 - b. Robust, secure technology systems and adequate server space for electronic data storage are required. In their submissions, firms shall include a brief description of the technology systems they plan to use for financial recordkeeping as well as general recordkeeping.
 - c. Regular collection of membership dues payments in accordance with the process and timeline outlined in the bylaws of the organization.
 - d. Liaising with accountants, attorneys, and other contractors to ensure compliance with federal and state requirements and organizational bylaws.
2. Recording, storage, publication, and maintenance of all official meeting minutes of the organization. In their submissions, firms shall include a brief description of how staff will perform these tasks.
3. Managing Group meetings, including scheduling meetings and managing calendar invitations, assisting Chair and Board of Directors with facilitation of meetings, coordinating with meeting hosts, preparing and distributing meeting agendas and other materials, and coordinating meals.
4. Preparation and publication of a YPDWMG annual report that provides an overview of the Group’s major activities in the previous year.
5. Regular maintenance and updates to the official [YPDWMG website](#) including timely posting of agendas in advance of meetings and minutes following those meetings.
6. Communications support, including serving as a primary point of contact for membership and external questions and requests as well as maintenance of the Group’s roster.
7. Regular monitoring of progress and coordination with other contractors and vendors as required to support the development and implementation of the Group’s Water Resources Plan.
8. Identify and research potential funding opportunities. Facilitate and/or write grant proposals.
9. Periodic work with the Board to shape Group priorities and strategic direction
 - a. Leadership on a strategic work plan to monitor progress towards strategic goals
10. Other tasks as assigned.

Timeline

- RFP Released: August 23, 2023
- Requests for Information (RFIs) received by: September 1, 2023
- RFIs responded to by: September 8, 2023
- Submissions due: October 2, 2023
- Evaluation period: October 3-20, 2023
- Finalist interviews (if needed): Early November 2023
- Award announced by December 1, 2023
- January 1, 2024: Contract executed and work begins

Evaluation Criteria & Scoring System

YPDWMG will select the most qualified firm based on demonstrated competence and qualification for the requested services. Firms interested in performing these services must exhibit relevant experience with this type of work, as outlined below, and should emphasize both the experience and capability of the personnel who will perform the work. YPDWMG seeks firms with experience in 501(c)(3) nonprofit management services. Interested firms should highlight their experience in this area in their submissions. Firm submissions will be reviewed and scored using the scoring system displayed below.

A five-member panel will review and score submissions, with each member independently scoring each submission. Following the review process, the panel will present their recommendation to the YPDWMG Board of Directors for Nonprofit Management Services of the YPDWMG 501(c)(3) nonprofit organization.

The YPDWMG Board of Directors may accept or reject this recommendation. If the recommendation is accepted, YPDWMG and its officers and agents will proceed with contract negotiations with the selected firm to finalize the firm's scope of services. Following these negotiations, the final contract will be presented to the full YPDWMG for final approval.

At a minimum, all interested firms are required to submit a statement of qualifications and experience containing the following information:

- *Summary:* A summary should provide a brief but thorough overview of how your firm can provide nonprofit management services to YPDWMG. Experience with administration and management of 501(c)(3) nonprofit organizations is desired and strongly preferred. Include an introductory statement and a summary of your firm's experience with the work described above. Provide the firm name, address, telephone number, email address, and contact person(s). Provide the year in which the firm was established and any former names under which the firm operated, if applicable.
- *Capacity:* Provide a complete description of staff (preferably in the form of a graphic organizational chart) and a staffing summary that addresses individual roles and responsibilities. Provide a resume for each of the staff members who may be involved in this work. Identify key staff proposed for the work. Key staff should possess extensive experience in related work, both in scope and extent. A resume of each member of the team is necessary and should detail relevant experience, length of service with the firm, and job duties during his/her tenure, educational background, and professional background.
- *Cost:* Provide a proposed annual cost to perform the nonprofit administration and management services described herein.
- *Experience:* Provide a list of all projects of similar size and scope completed by the firm within the past ten (10) years.
- *References:* Provide at least three (3) professional references that YPDWMG may contact to verify your firm's qualifications, experience, and involvement in the stated activities and projects. Job title, telephone numbers, e-mail address, and a physical address for each reference listed should be included in your statement of qualifications.
- *Insurance Requirements:* Obtain and maintain commercially reasonable insurance coverage commensurate with the scope of work outlined herein and the firm's operations, and satisfactory to the YPDWMG Board.

Evaluation Criteria	Possible Points	Points Given
Understanding of required tasks and needs as demonstrated in the qualifications statement	25	
Proposed annual cost to perform nonprofit management services	12	
Experience and track record of success with similar organizations and nonprofits comparable in type, size, and complexity to YPDWMG	13	
Qualifications of the staff assigned to perform the work (<i>higher scores given to staff with specific public water sector knowledge and experience</i>)	25	
Demonstrated ability of the firm to perform high quality work, control costs, meet deadlines, and provide adaptive strategic leadership as YPDWMG grows and changes over time	25	
POINT TOTAL	100	

Submission Instructions

Please submit a single PDF (no longer than 10 pages, minus appendices/attachments) to Drew Finley, Project Manager, at drew@fountainworks.com by 5:00 PM Eastern Time on October, 2, 2023 with the subject line “RFP - YPDWMG - [Firm Name].” Timely submission is the sole responsibility of the firm. Late submissions will not be considered. Early submissions are welcomed and appreciated.

Terms & Conditions

1. YPDWMG will not be responsible for any cost incurred by the firm for the participation in this RFP process. Each firm will bear all costs and expenses in connection with the preparation and submission of materials along with the provision of any supplemental material that may be requested.
2. All materials and information submitted during the RFP process will become the property of YPDWMG and will not be returned to the firm.
3. YPDWMG reserves the right to accept or reject, on a case-by-case basis and at its sole discretion, all submissions from firms. YPDWMG reserves the right to waive any informalities.
4. YPDWMG reserves the right to negotiate a final scope of work with the selected firm.
5. Provision of current and accurate information (including full name, telephone number, and email address) for references is the sole responsibility of the submitting firms. If YPDWMG is unable to reach the references listed to verify experience and performance, those references may not be considered.
6. YPDWMG will contact references provided by firms and may contact other potential references if referred to them in the course of the evaluation. By submitting a response to this RFP, the submitting firm releases YPDWMG from all liability concerning this exchange of information.
7. By submitting a response to this RFP, the submitting firm acknowledges that all information provided is true and accurate to the best of the firm’s knowledge. Submission of falsified information will be grounds for the firm’s disqualification from consideration.