

REQUEST FOR PROPOSALS (RFP)  
STRATEGIC PLANNING  
RFP 2026-03

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**Serving**

*The City of Newberry  
and Newberry County, SC*

3589 Grant Ave.  
Newberry, South Carolina 29108  
[www.newberryhousing.org](http://www.newberryhousing.org)

**RFP Available: Thursday, February 5, 2026**

**Questions Deadline: 2:00 PM EST on Thursday, February 26, 2026**  
**RFP Bid Deadline: 2:00 PM EST on **Thursday, March 5, 2026****

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INTRODUCTION

The Housing Authority of the City of Newberry and Newberry County, South Carolina (hereinafter, “NHA or Agency”) established in 1968, is a quasi-governmental corporation authorized by the State of South Carolina, Newberry County, to operate in the City of Newberry, South Carolina and primarily funded by the U.S. Department of Housing and Urban Development (HUD). NHA is governed by a seven-member Board of Commissioners (Board) authorized by laws of the State of South Carolina is responsible for the development of housing policy and the authorization of expenditures.

Currently, NHA owns and/or administers 2 individual Asset Management Projects (AMPs), comprised of 315 public housing units. In addition, NHA administers 239 Section 8/Housing Choice Vouchers and 40 Mainstream vouchers. NHA currently has approximately 14 full-time regular employees.

Your response to the Scope of Work and/or Technical Specifications must be complete, as it will become part of any contractual agreement. We appreciate the investment of time and resources firms are making by participating in this process. All submitted bids shall be evaluated for responsiveness to the requirements of the Invitation for Bids (“IFB”). Those responses not in accordance with the Invitation for Bids shall be deemed non-responsive and eliminated from further evaluation.

RFP INFORMATION AT A GLANCE

[Table No. 2]

|  |   |
|--|---|
| AGENCY CONTACT PERSON  | Jessica M. Holcomb Telephone: (803) 768-8371<br>E-mail: <a href="mailto:jholcomb@newberryhousing.org">jholcomb@newberryhousing.org</a><br><b>TDD/TTY: 800-735-2962</b>  |
| HOW TO OBTAIN THE RFP DOCUMENTS ON THE EPROCUREMENT MARKETPLACE  | <ol style="list-style-type: none"> <li>1. Access <a href="https://ha.internationaleprocurement.com">https://ha.internationaleprocurement.com</a> (no “www”).</li> <li>2. Click on the “Login” button in the upper left side.</li> <li>3. Follow the listed directions.</li> <li>4. If you have any problems in accessing or registering on the eProcurement Marketplace, we recommend that you call Customer Support at (866)526-9266.</li> </ol>   |
| PRE-SUBMISSION CONFERENCE  | NONE SCHEDULED  |
| QUESTION SUBMITTAL DEADLINE: no later than seven (7) business days before bidding due date via internet system or email. | <i>All questions pertaining to this IFB must be submitted in writing. Oral communications are discouraged and neither NHA nor any Architect will be bound by any oral answers or interpretations of the IFB. Written questions may be submitted via the internet system or via email.</i>   |
| PROPOSAL SUBMITTAL RETURN & DEADLINE   | <p style="text-align: center;"><b>March 5, 2026, at 2:00 P.M. EST</b></p> <p style="text-align: center;">Sealed bids are due at the following location:<br/>Newberry Housing Authority<br/>3589 Grant Ave.<br/>Newberry, SC 29108</p> <p>Submittal package <b>must</b> have the following notation on the bottom left-hand corner <b>“IFB for: Strategic Planning, March 5, 2026, at 2:00 p.m.-Enclose. Documentation must be received in-hand time verifiable by the NHA no later than 2:00 p.m. EST on March 5, 2026.</b></p> |

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**1.0 THE AGENCY’S RESERVATION OF RIGHTS.** The Agency reserves the right to:

- 1.1 Right to Reject, Waive, or Terminate the RFP.** Reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the Agency to be in its best interests.
- 1.2 Right to Not Award.** Not to award a contract pursuant to this RFP.
- 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the successful proposer(s).
- 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer(s) shall provide the services called for in this RFP.
- 1.5 Right to Retain Proposals.** Retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the Agency Contracting Officer (CO).
- 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
- 1.7 Right to Reject Any Proposal.** Reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
- 1.9 Right to Prohibit.** At any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the eProcurement Marketplace (hereinafter also “the Marketplace”) and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document and within the Marketplace, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this time-frame shall relieve the Agency, but not the prospective proposer, of any responsibility pertaining to such issue.
- 1.10 Right to Reject – Obtaining Competitive Solicitation Documents.** The eProcurement Marketplace is the only official and appropriate venue to obtain the RFP documents (and any other information pertaining to this RFP such as addenda). Accordingly, by submitting a response to this RFP the respondent thereby affirms that he/she obtained all information on the Marketplace. Any other group such as an association or a proposal depository that informs potential respondents of the availability of such competitive solicitations are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential respondents to visit the Marketplace to obtain

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the documents. The Agency will reject without consideration any response submitted from a firm that has not obtained the documents from the Marketplace.

**2.0 SCOPE OF WORK/TECHNICAL SPECIFICATIONS.** The Agency is seeking proposals from qualified, licensed and insured entities to provide the following detailed services listed herein:

**2.1 General Description.**

NHA is soliciting qualifications from experienced strategic planning consultants to facilitate an onsite strategic planning retreat for its Board of Directors and Executive Director. This retreat will guide the development of a three to five-year strategic plan that defines NHA’s mission, vision, and organizational goals as it positions itself to develop and rehabilitate affordable housing in the City of Newberry.

**2.2 Objectives.**

The selected consultant will lead the NHA Board and Executive Director through a collaborative strategic planning process designed to clarify organizational direction and establish actionable priorities with an emphasis on implementation.

The Board anticipates this process may occur over one or more days (likely on a Saturday) and include the following components:

- 2.2.1** Facilitation of an in-person strategic planning retreat with the NHA Board and Executive Director.
- 2.2.2** Pre-session interviews and/or surveys with key stakeholders, including Board member, staff, and community partners.
- 2.2.3** Review of existing NHA documents, including prior strategic plans, community housing needs assessment, and organizational materials.
- 2.2.4** Development of a written strategic plan outlining mission, vision, values, strategic goals, and measurable objectives.
- 2.2.5** Recommendations related to implementation, governance structure, and funding strategies.
- 2.2.6** Optional follow-up services to support plan execution, organizational development, and identification of grant funding opportunities.

**2.3 Consultant Qualifications.**

Respondents shall demonstrate the following qualifications:

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- 2.3.1 Proven experience facilitating strategic planning processes or board retreats for public housing-focused nonprofits, or government-affiliated entities.
- 2.3.2 Knowledge of HUD programs, nonprofit housing development, and community reinvestment strategies.
- 2.3.3 Strong facilitation, communication, and consensus-building skills.
- 2.3.4 Experience working with newly formed or evolving nonprofit boards.
- 2.3.5 Ability to provide post-planning guidance, including organizational capacity-building and grant identification support.

### 2.4 Deliverables.

The consultant shall provide, at a minimum:

- 2.4.1 Pre-planning interviews and a proposed strategic planning agenda.
- 2.4.2 Facilitation of an onsite strategic planning retreat (one or more days, as appropriate).
- 2.4.3 A draft and final strategic plan document.
- 2.4.4 *Optional follow-up consulting services, which may include implementation support, grant funding guidance, and progress evaluation (to be negotiated separately).*

### 2.5 Timeline.

- 2.5.1 RFQ Issued: February 5, 2026
- 2.5.2 Questions Due: February 26, 2026
- 2.5.3 Responses Due: March 5, 2026.
- 2.5.4 **Consultant Selection: March 2026 (date to be finalized).**
- 2.5.5 Strategic Planning Retreat: April - May 2026

## 3.0 PROPOSAL FORMAT.

- 3.1 **Proposal Submittal.** The Agency intends to retain the Contractor pursuant to a “Best Value” basis, not a “Low Bid” basis (“Best Value,” in that the Agency will, as detailed within the following Section 4.0, consider factors other than just cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the

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sequence noted within the table below. Each category must be separated by numbered dividers and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

**[Table No. 3]**

| RFP Section | Tab No. | Description   |
|-------------|---------|---|
| 3.1.1       | 1       | <b>Form of Proposal.</b> This Form is attached hereto as Attachment A to this RFP document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this section as a part of the proposal submittal.   |
| 3.1.2       | 2       | <b>Form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract.</i></b> This Form is attached hereto as Attachment B to this RFP document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this section as a part of the proposal submittal.   |
| 3.1.3       | 3       | <b>Profile of Firm Form.</b> The Profile of Firm Form is attached hereto as Attachment C to this RFP document. This 2-page Form must be fully completed, executed and submitted under this section as a part of the proposal submittal.   |
| 3.1.4       | 4       | <b>Proposed Services.</b> The proposer shall place under this section documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the preceding Section 2.0 herein, including, but not limited to:   |
| 3.1.4.1     |         | As detailed within Section 4.1, Evaluation Factor No. 2, herein, the proposer’s <b>DEMONSTRATED UNDERSTANDING of the AGENCY’S REQUIREMENT.</b>  |
| 3.1.4.2     |         | As detailed with Section 4.1, Evaluation Factor No. 3, here in the proposer’s <b>QUALITY of the TECHNICAL APPROACH and the SERVICES PROPOSED.</b>   |
| 3.1.4.3     |         | As detailed within Section 4.1, Evaluation Factor No. 4, herein, the proposer’s <b>TECHNICAL CAPABILITIES</b> (in terms of personnel) and the <b>MANAGEMENT PLAN</b> (including the ability to provide the services detailed herein).   |
| 3.1.4.4     |         | As detailed within Section 4.1, Evaluation Factor No. 5, herein, the proposer’s <b>DEMONSTRATED RELEVANT EXPERIENCE</b> in performing similar work and <b>SUCCESSFUL PAST PERFORMANCE</b> (especially pertaining to such with public housing agencies) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means. |
| 3.1.4.5     |         | If appropriate, how staff are retained, screened, trained, and monitored.   |
| 3.1.4.6     |         | An explanation and copies of forms that will be used and reports that will be submitted and the method of such reports (i.e. written; fax; Internet; etc.).   |
| 3.1.4.7     |         | Showcase staff creativity and demonstrate staff’s written communication expertise.  |

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|         |   |   |
|---------|---|---|
| 3.1.4.8 |   | A complete description of the products and services the firm may provide.   |
| 3.1.5   | 5 | <b>Managerial Capacity/Financial Viability/Staffing Plan.</b> The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment C, <i>Profile of Firm Form</i> . Such information shall include the proposer’s qualifications to provide the services; a description of the background and current organization of the firm. |
| 3.1.6   | 6 | <b>Client Information.</b> The proposer shall submit a listing of former or current clients, including Public Housing Authorities and/or Public Entities, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:  |
| 3.1.6.1 |   | The client’s name;  |
| 3.1.6.2 |   | The client’s contact name;  |
| 3.1.6.3 |   | The client’s telephone number and e-mail address;   |
| 3.1.6.4 |   | A brief narrative description and scope of the service(s) and the dates the services were/are provided.   |
| 3.1.7   | 7 | Proposal Compensation Form  |
| 3.1.8   | 8 | <b>Subcontractor/Joint Venture Information (Optional Item).</b> The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the proceeding sections must also be included for any major subcontractors (10% or more) or from any joint venture.  |
| 3.1.9   | 9 | <b>Other Information (Optional Item).</b> The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.  |
| 3.1.10  |   | <b>Optional Tabs.</b> If no information is to be placed under any of the above noted sections please place there under a statement such as “THIS SECTION LEFT INTENTIONALLY BLANK.” Please do not eliminate any of the Sections.  |

**3.2 Entry of Proposed Fees.**

- 3.2.1** The proposed fees shall be submitted by the bidder and received by NHA on **the Proposal Compensation Form** provided only. A proposer must enter a **proposed fee** for each item (*failure to provide a bid fee may deem your bid to be unresponsive*) "No Bid" will not be allowed for any item, though a “No Charge” will be allowed for certain items.
- 3.2.2** **Pricing Items.** Unless otherwise stated herein, the proposed fees are all-inclusive of all related costs that the successful proposer will incur to provide the noted services, including, but not limited to: employee wages and benefits; clerical support; overhead; profit; licensing; insurance; materials; supplies;

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tools; equipment; long distance telephone calls; travel expenses; document copying not specifically agreed to by the Agency; etc.

[Table No. 4]

| RFP Section | Pricing Item No.                   | Qty | U/M   | Description  |
|-------------|------------------------------------|-----|-------|--|
| 3.2.2.1     | <b>Strategic Planning Services</b> |     |       |  |
| 3.2.2.1.1   | 1                                  | 1   | Each  | Firm Fixed Fee   |
| 3.2.2.1.2   | 2                                  | 1   | Hours | Hourly fees on additional services outside the RFP Scope of Services |

**3.3 Additional Information pertaining to the preceding listed Pricing Items.**

**3.3.1 Quantities.** All quantities entered by the Agency herein (especially within the immediate preceding Table No. 4) and within the corresponding Pricing Items within the eProcurement Marketplace are for calculating purposes only. As may be further detailed herein, the Agency does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this RFP, as the Agency anticipates that the ensuing contract may be a Requirements Contract, in which case the Agency shall retain one contractor only and shall retain the right to order from that contractor (successful proposer), on a task order basis, any amount of services the Agency requires. Please note the immediate following exception to the aforementioned “Requirements Contract” language.

**3.3.2 Realistic Fees.** Proposers must enter a realistic and reasonable proposed cost for all Pricing Items. Whereas no additional proposed costs can or will be received after the proposal submittal deadline, any proposer that does not comply with this requirement will be rejected without further consideration

**3.3.2.1 Realistic Cost for Pricing Items.** Each proposer is strongly encouraged to enter a realistic hourly cost for all Pricing Items. For example, if the Contractor enters \$1.00 per hour for the hourly Pricing Item (proposers typically do so in an effort to improve their position in regards to Evaluation Factor No. 1, as detailed within the preceding Table No. 4 herein), then the \$1.00 per hour is what the Contractor will charge the Agency for any additional work that the Agency may retain the Contractor to provide if the Agency deems such retention is in the Agency's best interests to do so. Accordingly, it is the Agency's opinion that it is very much in the best interests of the proposer to propose a realistic hourly fee for this Pricing Item. If, despite this warning, the Contractor proposes an hourly fee that the Agency deems is not realistic, then the Agency reserves the right to require the Contractor to, at contract execution, present a cash bond in a suitable amount (i.e.,

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\$5,000.00) to ensure that the Contractor will fulfill his/her obligation in this matter.

**3.3.2.2 No Post-submittal Deadline Corrections Allowed.** The Agency WILL NOT, after the submittal deadline, negotiate an increase to any unit costs or fees proposed prior to the submittal deadline; accordingly, proposers are strongly cautioned to submit a realistic price for the Pricing Items identified within the preceding Table No. 4 herein.

**3.3.3 Prior Agency Approval Required.** Please note that the successful proposer shall NOT conduct any additional work without the prior written authorization of the Agency representative (via delivery of a Task Order, which may take the form of an e-mail). Failure to abide by this directive shall release the Agency of any obligation to pay the successful proposer for any work conducted without the noted prior written authorization.

**3.3.4 No Deposit/No Retainer.** The Agency will NOT pay any deposits or retainer fees as a result of award of the ensuing contract. This means that the Agency will pay the successful proposer(s) for firm fixed fee proposed only.

**3.4 Proposal Submission.** Proposal Submission. All proposals must be submitted and time-stamped received in the designated Agency office by no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 1 original signature copy (marked "ORIGINAL") and 2 exact copies (each of the 2 separate proposal submittals shall have a cover and extending tabs) of the proposal submittal, shall be placed unfolded in a sealed package and addressed to:

**Newberry Housing Authority  
3589 Grant Ave.  
Newberry, SC 29108**

**The package exterior must clearly denote the IFB number and must have the bidder's name and return address.** **Late Bids.** Bids received after the published deadline will not be accepted.

**3.4.1 Submission Conditions.** DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to the Agency by the proposer, such may invalidate that proposal. If, after accepting such a proposal, the Agency decides that any such entry has not changed the intent of the proposal that the Agency intended to receive, the Agency may accept the proposal and the proposal shall be considered by the

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Agency as if those additional marks, notations, or requirements were not entered on such. By accessing the eProcurement Marketplace, registering, and downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.

**3.4.2 Submission Responsibilities.** It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by the Agency, including the RFP document, the documents listed within the following Section 3.8, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the CO to exclude any of the Agency requirements contained within the documents may cause that proposer to not be considered for award.

**3.5 Proposer's Responsibilities — Contact with the Agency.** It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the CO only. Proposers must not make inquiry or communicate with any other Agency staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for the Agency to not consider a proposal submittal received from any proposer who may not have abided by this directive.

**3.5.1 Addenda.** All questions and requests for information must be addressed in writing to the CO. The CO will respond to all such inquiries in writing by addendum to all prospective proposers (i.e. firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the CO will NOT conduct any *ex parte* (a substantive conversation—"substantive" meaning, when decisions pertaining to the RFP are made—between the Agency and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the CO—it simply means that, other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the CO may not respond to the prospective proposer's inquiries but will direct him/her to submit such inquiry in writing so that the CO may more fairly respond to all prospective proposers in writing by addendum.

**3.6 Proposer's Responsibilities — Equal Employment Opportunity and Supplier Diversity.** Both the Contractor and the Agency have, pursuant to HUD regulation,

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certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

**3.6.1** Within 2 CFR §200.321 it states:

**3.6.1.1** Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

**3.6.1.2** (a) The Non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

**3.6.1.3** (2) Affirmative steps must include:

**3.6.1.3.1** (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

**3.6.1.3.2** (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

**3.6.1.3.3** (3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority business, and women's business enterprises;

**3.6.1.3.4** (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women's business enterprises;

**3.6.1.3.5** (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

**3.6.1.3.6** (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

**3.6.2** Within HUD Procurement Handbook 7460.8 REV 2 it states:

**3.6.2.1** Section 15.5.A, Required Efforts. Consistent with Presidential Orders 11625, 12138, and 12432, the <Agency> shall make every

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effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in <Agency> contracting.

**3.6.2.2** Section 15.5.B, Goals. The Agency is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of . . . contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

**3.6.3** Within our **Agency Procurement Policy** it states that our Agency will:

**3.6.3.1 Assistance to Small and Other Business, Required Efforts:**

**3.6.3.1.1** Including such firms, when qualified, on solicitation mailing lists;

**3.6.3.1.2** Encouraging their participation through direct solicitation of proposals or proposals whenever they are potential sources;

**3.6.3.1.3** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such firms;

**3.6.3.1.4** Establishing delivery schedules, where the requirement permits, which encourage participation by such firms;

**3.6.3.1.5** Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce;

**3.6.3.1.6** Including in contracts, to the greatest extent feasible, a clause requiring contractors, to provide opportunities for training and employment for lower income residents of the project area and to award subcontracts for work in connection with the project to business concerns which provide opportunities to low-income residents, as described

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in 24 CFR Part 75 (so-called Section 3 businesses);  
and

**3.6.3.1.7** Requiring prime contractors, when subcontracting is anticipated, to take the positive steps listed above.

**3.6.4 Requirements.** Accordingly, please see Section 3.1.7 within Table No. 4 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

**3.7 Pre-proposal Conference.** There is not a pre-proposal conference scheduled as a part of this RFP.

**3.8 Recap of Attachments.** It is the responsibility of each proposer to verify that he/she has downloaded the following attachments pertaining to this RFP, which are hereby by reference included as a part of this RFP:

[Table No. 5]

| RFP Section | Document No. | Attachment | Description  |
|-------------|--------------|------------|--|
| 3.8.1       | 1.0          |            | This RFP Document  |
| 3.8.2       | 2.0          | A          | Form of Proposal   |
| 3.8.3       | 3.0          | B          | Form HUD-5369-C (8/93), <i>Certifications and Representations of Offerors, Non-Construction Contract</i>   |
| 3.8.4       | 4.0          | C          | Profile of Firm Form   |
| 3.8.5       | 5.0          | D          | Section 3 Policy Procedures Compliance   |
| 3.8.6       | 6.0          | E          | HUD 5369-B (8/93), <i>Instructions to Offerors, Non-Construction</i>   |
| 3.8.7       | 7.0          | F          | Supplemental Instructions to Proposers & Contractors (SIPC)  |
| 3.8.8       | 8.0          | G          | Sample Contract Form (please note that this contract and the listed appendices are being given as a sample only—the Agency reserves the right to revise any clause herein and/or to include within the ensuing contract any additional clauses that the Agency feels it is in its best interests to do so) |
| 3.8.8.1     | 8.1          | G-1        | Sample Contract Appendix No. 1: form HUD-5370-C (01/2014), <i>General Conditions for Non-Construction Contracts Section I (With or without Maintenance Work)</i>   |
| 3.8.8.2     | 8.2          | G-2        | Sample Contract Appendix No. 2: form HUD 50071 (01/14), <i>Certification of Payments to Influence Federal Transactions</i> (NOTE: This form will only be completed and included as a part of the ensuing contract if the Agency  |

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|                |            |            |   |
|----------------|------------|------------|---|
|                |            |            | anticipates that total awards pursuant to the ensuing contract may or will exceed \$100,000.)   |
| <b>3.8.8.3</b> | <b>8.3</b> | <b>G-3</b> | Sample Contract Appendix No. 3: Standard Form LLL (Rev. 01/14), <i>Disclosure of Lobbying Activities</i> (NOTE: This form will only be completed and included as a part of the ensuing contract if the Contractor designates an affirmative answer to Item No. (2) within the immediate identified form 50071.) |
| <b>3.8.8.4</b> | <b>9</b>   | <b>H</b>   | Agency Profile of Properties  |

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**4.0 PROPOSAL EVALUATION.**

**4.1 Evaluation Factors.** The following factors will be utilized by the Agency to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal and on-line (specifically, the pricing submitted on-line):

[Table No. 6]

| <b>(1) No.</b>  | <b>(2)Max Point Value*</b> | <b>(3)Factor Type</b>         | <b>(4) Factor Description</b>   |
|---|----------------------------|-------------------------------|---|
| <b>1</b>  | <b>15 points</b>           | <b>Objective</b>              | The <b>PROPOSED COSTS</b> submitted by the proposer.  |
| <b>2</b>  | <b>20 points</b>           | <b>Subjective (Technical)</b> | The proposer’s <b>DEMONSTRATED UNDERSTANDING of the AGENCY’S REQUIREMENT.</b>   |
| <b>3</b>  | <b>25 Points</b>           | <b>Subjective (Technical)</b> | The <b>QUALITY</b> of the <b>TECHNICAL APPROACH</b> and the <b>SERVICES PROPOSED.</b>   |
| <b>4</b>  | <b>30 points</b>           | <b>Subjective (Technical)</b> | The proposer’s <b>DEMONSTRATED RELEVANT EXPERIENCE</b> in performing similar work and the <b>DEMONSTRATED SUCCESSFUL PAST PERFORMANCE</b> (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or the information submitted within the proposal. |
| <b>5</b>  | <b>10 Points</b>           | <b>Subjective (Technical)</b> | The <b>OVERALL QUALITY, ORGANIZATION, and PROFESSIONAL APPEARANCE</b> of the <b>PROPOSAL SUBMITTED</b> , based upon the opinion of the evaluators.  |
|   | <b>100 points</b>          |                               | <b>Total Points</b>   |
| <b>*NOTE: Points will be awarded for each Subjective Factor by each of the appointed evaluation committee members based on his/her opinion after a thorough review of the information submitted by each proposer within his/her proposal.</b> |                            |                               |   |

**4.2 Evaluation Method.**

**4.2.1 Initial Evaluation for Responsiveness.** Each proposal received will first be evaluated for responsiveness (i.e. meets the minimum of the requirements).

**4.2.2 Evaluation Packet.** An evaluation packet will be prepared for each evaluator, including the following documents:

**4.2.2.1** Instructions to Evaluators;

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- 4.2.2.2 Proposal Tabulation Form;
- 4.2.2.3 Written Narrative Form for each proposer;
- 4.2.2.4 Recap of each proposer’s responsiveness;
- 4.2.2.5 Copy of all pertinent RFP documents.

**4.2.3 Evaluation Committee.** The Agency anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she shall not make any attempt to contact or discuss with such person anything related to this RFP. As detailed within Section 3.5 of this document, the designated CO is the only person at the Agency that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may cause such proposer(s) to be eliminated from consideration for award.

**4.2.4 Evaluation.** The CO will evaluate and award points pertaining to Evaluation Factors No. 1 (the “Objective” Factors). The appointed evaluation committee, independent of the CO or any other person at the Agency, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2, and 3 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO.

**4.2.4.1 Points Awarded Range.** Pertaining to the Subjective Factors, please note the following range of points awarded (points pertaining to this RFP are shaded—please also see the Evaluation Factors detailed within the preceding Section 4.1):

[Table No. 7]

| Points Awarded Range  |           |       |     |       |        |
|---|-----------|-------|-----|-------|--------|
| Classification*   | Rating    | %     | 10  | 30    | 100**  |
| Acceptable  | Excellent | 95%/+ | 10  | 29-30 | 95-100 |
| Acceptable  | Very Good | 90%/+ | 9   | 27-28 | 90-94  |
| Potentially Acceptable  | Good      | 80%/+ | 8   | 24-26 | 80-89  |
| Potentially Acceptable  | Average   | 70%/+ | 7   | 21-23 | 70-79  |
| Unacceptable  | Poor      | <70%  | 0-6 | 0-20  | 0-69   |
| *Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.<br>**Total available points to be awarded, including cost points, minus preference points. |           |       |     |       |        |

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- 4.2.5 Potential "Competitive Range" or "Best and Finals" Negotiations.** The Agency reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a "Best and Finals" Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in any case within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.
- 4.2.6 Determination of Top-ranked Proposer.** Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded by the CO to determine the final rankings, which is typically forwarded by the CO to the ED for approval. If the evaluation was performed to the satisfaction of the ED, the final rankings may be forwarded to the Housing
- 4.2.7** Authority Board of Commissioners (BOC) at a scheduled meeting for approval. Contract negotiations may, at the Agency's option, be conducted prior to or after the BOC approval.
- 4.2.7.1 Minimum Evaluation Results.** To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total possible points detailed within Section 4.1 herein).
- 4.2.7.2 Ties.** In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by "drawing lots or other random means of selection."
- 4.2.8 Notice of Results of Evaluation.** If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:
- 4.2.8.1** Which proposer received the award;
- 4.2.8.2** Where each proposer placed in the process as a result of the evaluation of the proposals received;
- 4.2.8.3** The cost or financial offers received from each proposer;
- 4.2.8.4** Each proposer's right to a debriefing and to protest.
- 4.2.9 Restrictions.** All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees

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of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

**5.0 CONTRACT AWARD.**

**5.1 Contract Award Procedure.** If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:

**5.1.1** By completing, executing and submitting a proposal, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the Agency, either in hard copy or on the Marketplace” including the contract clauses already attached as Attachments G and G-1 through G-3, each attached hereto. Accordingly, the Agency has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

**5.2 Contract Conditions.** The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this RFP:

**5.2.1 Contract Form.** The Agency will not execute a contract on the Contractor’s form—contracts will only be executed on the Agency form (please see Sample Contract, Attachments G and G-1 through G-3 each attached hereto), and by submitting a proposal the Contractor agrees to do so (please note that the Agency reserves the right to amend this form as the Agency deems necessary). However, the Agency will during the RFP process (prior to the posted question deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the Contractor the right to refuse to execute the Agency’s contract form. It is the responsibility of each prospective proposer to notify the Agency, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The Agency will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the Agency’s response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

**5.2.1.1 Mandatory HUD Forms.** Please note that the Agency has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.

**5.2.2 Assignment of Personnel.** The Agency shall retain the right to demand and receive a change in personnel assigned to the work if the Agency believes that

such change is in the best interest of the Agency and the completion of the contracted work.

**5.2.3 Unauthorized Sub-contracting Prohibited.** The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported assignment of interest or delegation of duty, without the prior written consent of the CO shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the Contractor as a result of the proposed contract; either as determined by the CO.

**5.3 Contract Period.** The Agency anticipates that it will initially award a contract for the period of 1 year with the option, at the Agency’s discretion, of 4 additional one-year option periods (for the Annual Updates), for a total maximum contract period of 5 years.

**5.4 Licensing and Insurance Requirements.** Prior to award (but not as a part of the proposal submission) the *successful proposer* will be required to provide (NOTE: The Agency reserves the right to increase the following limits based on the requirements of specific funding sources, or the based on the size of the contract executed with the chosen firm, or based on the size of the ensuing construction contract):

**5.4.1 Workers Compensation Insurance.** An original certificate evidencing the proposer’s current industrial (worker’s compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Contractor that has employees other than just the owner working on-site to provide the services);

**5.4.2 General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (e.g. “commercially reasonable,” meaning at least 1% of the “general aggregate minimum” of the policy, with a maximum deductible amount of \$50,000;

**5.4.3 Professional Liability Insurance.** An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a commercially reasonable deductible (e.g. “commercially reasonable,” meaning at least 1% of the “general aggregate minimum” of the policy, with a maximum deductible amount of \$50,000;

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- 5.4.4 Automobile Insurance.** An original certificate showing the proposer’s automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.
- 5.4.5 City/County/State Business License.** If applicable, a copy of the proposer’s business license allowing that entity to provide such services within the City of Newberry, the County of Newberry, and/or the State of South Carolina.
- 5.4.6 Certificates/Profile of Firm Form.** Pertaining to the aforementioned (within Sections 5.4.1 through 5.4.5) insurance certificates and licenses, each proposer is required to enter related information where provided for on the Profile of Firm Form (do not attach or submit copies of the insurance certificates or licenses within the proposal submittal—we will garner the necessary documents from the successful proposer prior to contract execution).
- 5.5 Right to Negotiate Final Fees.** The Agency shall retain the right to negotiate the amount of fees that are paid to the Contractor, meaning the fees proposed by the top-rated proposer may, at the Agency’s options, be the basis for the beginning of negotiations. Such negotiations shall begin after the Agency has chosen a top-rated proposer. If such negotiations are not, in the opinion of the CO successfully concluded within 5 business days, the Agency shall retain the right to end such negotiations and begin negotiations with the next-rated proposer. The Agency shall also retain the right to negotiate with and make an award to more than one proposer.
- 5.6 Contract Service Standards.** All work performed pursuant to this RFP must conform and comply with all applicable local, state and federal codes, statutes, laws, and regulations.
- 5.7 Prompt Return of Contract Documents.** Any and all documents required to complete the contract, including contract signature by the successful proposers, shall be provided to the Agency within 10 workdays of notification by the Agency.