



Request for Proposal for Journey Mapping
October 2021

**REQUEST FOR PROPOSALS FOR JOURNEY MAPPING
PROJECT
October 29, 2021 – March 25, 2022**

INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:

**Sharon C. Goodson
Executive Director**

**North Carolina Community Action Association
4428 Louisburg Road, Suite 101
Raleigh, NC 27616
919.790.5757
(Fax) 919.790.5767
Sharon.goodson@nccaa.net**

I. GENERAL INFORMATION.

A. Purpose. This request for proposal (RFP) is to contract for completion of an agency-wide journey mapping customer experience assessment for a local NC community action agency (CAA). Community action agencies are committed to continuous internal improvement to live out the promise of “helping people and changing lives.” Through journey mapping, agencies can engage in a systematic internal assessment of the client experience to discover current service delivery best practices, as well as possible opportunities for improvement.

B. Who May Respond? Entities specializing in nonprofit assessment and journey mapping processes may apply.

C. Instructions on Proposal Submission.

- 1. Closing Submission Date.** Proposals must be submitted no later than 4pm on Friday, October 22, 2021.
- 2. Project Completion Date.** All activities associated with this proposal must be completed no later than Friday, March 25, 2022.
- 3. Inquiries.** Inquiries concerning this RFP should be e-mailed to:
Sharon.goodson@nccaa.net
- 4. 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 the North Carolina Community Action Association (hereinafter referred to as NCCAA).
- 5. Instructions to Prospective Contractors.** Please submit proposals electronically to:

Sharon C. Goodson
Executive Director
North Carolina Community Action Association
Sharon.Goodson@nccaa.net

It is important that the Offeror's proposal be submitted as a PDF document with a cover page including the following information:

Request for Proposal
[TIME] [DATE]
Proposal for NCCAA Journey Mapping Project

Failure to do so may result in premature disclosure of your proposal. It is the responsibility of the Offeror to ensure the proposal is received by NCCAA, by the date and time specified above. Late proposals will not be considered.

6. Right to Reject. NCCAA reserves the right to reject any, and all proposals received in

response to this RFP. A contract for the accepted proposal will be drafted based upon the factors described in this RFP.

7. Small and/or Minority-Owned Businesses. Efforts will be made by NCCAA to utilize small businesses, women and/or minority owned businesses. Offeror qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 C.F.R. § 121.201).

8. Notification of Award. It is expected that a decision selecting the successful firm will be made within two (2) weeks of the closing date for the receipt of proposals.

D. Description of Entity. NCCAA is the statewide association of North Carolina's 34 Community Action Agencies. Community Action Agencies are the only nonprofits mandated by federal legislation to serve the poor and disadvantaged. Our agencies share a common mission: to help low-income people become self-sufficient and independent of public programs. They are governed locally by a tripartite board of directors with one-third representation from the public sector (elected officials or their appointees) at least one-third representation of the low-income sector with the remainder from private entities.

NCCAA exists to give voice to the needs, concerns, and stories of NC's disadvantaged and low-income citizens, as well as, shed light on the collective impact of community action agencies. With some 5,000 employees, boards of directors and tens of thousands of volunteers and an extensive list of partners, community action agencies work diligently in local communities to broaden the economic and social horizons of the 1.3 million or 13.6% of North Carolinians living in poverty.

II. SCOPE OF SERVICES. The Offeror shall be readily available to perform the following services, as requested by the Executive Director and/or Board of Directors:

1. Comprehensive Agency-Wide Journey Mapping

High performing agencies routinely measure and improve internal operations. These internal assessment activities strengthen agency effectiveness and efficiency to continually improve client experiences. Through journey mapping, agencies can identify potential opportunities to strengthen operations, including but not limited to, the intake process, program operations, internal and external referral processes, client follow-up, and overall client experience. The journey mapping process should also identify agency strengths and highlight the best practices already being implemented. This journey mapping experience will be offered to one community action agency and will include a comprehensive assessment of the client experience to identify agency strengths and opportunities for improvement.

2. Final Report

The final report will include the following minimum information:

- Journey Mapping Methodology: A description of the methods used to conduct the comprehensive assessment.
- Process Overview: An overview of the agency's current intake, referral, and

customer feedback processes.

- Findings: The results of the journey mapping process including agency strengths and best practices.
- Recommendations: May include but are not limited to system updates, process/paperwork updates, staff training opportunities, enhanced referral, or follow-up processes, etc.

3. Presentation of Findings

The consultant will prepare and deliver a presentation of findings that summarizes findings and recommendations. The presentation will be presented to the NCCAA and leadership of the local CAA.

Offeror shall be prepared to submit detailed billing statements for all services. Offeror shall also include summaries of work performed and time spent on services performed under the flat monthly fee, as discussed below.

III. PROPOSAL CONTENTS. The Offeror, in its proposal, shall, as a minimum, include the following:

A. Experience. The Offeror should describe its experience related to conducting similar agency assessments, including the name, address, contact person, and telephone number of at least one previous client, preferably a client comparable to NCCAA. The Offeror must submit a previous completed report.

B. Cost. The Offeror's proposed cost should include information on the billing rate which is inclusive of all expenses. NCCAA reserves the right to negotiate with the Offeror on the structure of the billing and/or retainer fee.

C. Description of Work. The Offeror should include a description of the proposed journey mapping process, final report and presentation of findings as described in Section II: Scope of Services. A project timeline should also be included.

IV. PROPOSAL EVALUATION

A. Submission of Proposals. Proposals must include all sections described in Section III: Proposal Contents.

B. Evaluation Procedure and Criteria. NCCAA's Executive Director and appropriate staff will review proposals and make recommendations to the Board of Directors for final approval. The Executive Director and/or Board of Directors may request a meeting with qualified Offeror(s) prior to final selection. Proposals will be reviewed in accordance with the following criteria:

1. Proposed approach to scope of work
2. The Offeror's experience with similar clients and reports
3. Cost
4. Interviews, if conducted