

# Organizational Assessment and Succession Planning Services Request for Bids (RFB)

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## 1. Overview

### About Career Path Services

Career Path Services is an equity centered, workforce development and human services non-profit corporation headquartered in Spokane, conducting business in Washington State since 1971. We disrupt the drivers of poverty through equitable access to economic opportunity and financial stability, guided by our purpose of breaking the spirit of poverty through the dignity of work.

### Required Services

Career Path Services seeks bids from qualified vendors to conduct a comprehensive organizational assessment and develop an integrated succession planning framework for our senior leadership team. The selected vendor will work with our Board and leadership team to assess organizational readiness and develop succession strategies. The total budget for this project shall not exceed \$65,000. Bidders should provide detailed cost breakdowns and demonstrate value for investment in their proposals.

## 2. Scope of Services

### Assessment Requirements

- Working directly with Board and leadership team, assess organizational readiness for succession planning
- Review results of completed leadership 360-degree assessments
- Incorporate existing KOLBE Assessment profiles in analysis
- Evaluate current leadership pipeline
- Identify critical success factors for key roles

### Succession Planning Requirements

- Develop comprehensive succession planning framework
- Design knowledge transfer and transition protocols
- Create development pathways for potential successors
- Provide implementation guidance and tools

### Deliverables

- Targeted organizational assessment focused on succession readiness, including high-level leadership capacity evaluation
- Core succession planning framework and implementation guide containing:

- Basic transition plan templates
- Essential stakeholder communication guidelines
- Key knowledge transfer protocols
- Individual succession plans for key positions, with development pathway templates that can be adapted for other positions
  - Emergency succession procedures with clear activation protocols
  - Basic implementation tools and templates for ongoing succession management

### **Project Timeline and Implementation**

This RFB is being released concurrently with a related RFB for Leadership 360 Assessment Services. Organizations may submit bids for either or both opportunities.

**Implementation Window: April 2025 - March 31, 2026**

**For single-service bids:**

- Provide detailed project timeline within the implementation window
- Include key milestones and deliverables
- Specify duration of each project phase
- Outline resource allocation plan

**For dual-service bids:**

- Indicate sequential or concurrent implementation approach
- Demonstrate operational efficiencies and cost savings
- Provide integrated timeline for both services
- Explain how service quality will be maintained
- Include separate cost breakdowns for each service

All deliverables for either single or dual-service implementation must be completed no later than March 31, 2026.

### **Service Delivery**

Services will include a combination of virtual and in-person meetings. In-person meetings will be conducted in Spokane, WA. Specific location details will be provided upon contract award.

## **3. Required Bid Elements**

### **Company Information**

- Brief organizational overview
- Two client references from similar organizational assessment and succession planning projects
- Experience working with non-profit organizations

## Service Description

- Organizational assessment methodology with focus on key employee succession readiness
- Succession planning approach, including criteria for identifying and prioritizing key positions
- Process for integrating KOLBE insights into leadership transition planning
- Implementation support details with emphasis on template development and knowledge transfer
- Clear description of how deliverables can be scaled or adapted for additional positions
- Proposed deliverables and timeline for completion
- Detailed cost breakdown and payment terms, including:
  - Cost per major deliverable
  - Any optional service add-ons within budget
  - Proposed payment schedule

## Confidentiality and Data Security

- Maintain strict confidentiality of all assessment results and organizational information
- Use secure, encrypted platforms for data collection, methods for delivering individual results, and storage hosted on US-based servers
- Implement appropriate access controls for assessment data and reports
- Return or securely destroy all confidential information upon project completion

## 4. Selection Process

### Timeline

- Bid Release: Week of February 24, 2025
- Letter of Intent to Bid: March 5, 2025
- Questions accepted until: March 10, 2025 12:00 PM PST
- Bids Due: March 20, 2025, 5:00 PM PST

### Selection Criteria

Career Path Services will evaluate bids using the following scoring matrix:

#### **Technical Approach and Methodology: 35%**

- Understanding of requirements
- Quality and clarity of proposed approach
- Innovation and effectiveness of solutions

#### **Experience and Qualifications: 25%**

- Relevant past performance
- Industry expertise
- Quality of references

#### **Cost Proposal: 25%**

- Overall cost
- Value for investment
- Cost clarity and justification

**Project Management: 15%**

- Timeline and milestones
- Communication approach
- Resource allocation

Career Path Services will award the contract based on the highest scoring bid that represents the best value to the organization.

## **5. Terms and Conditions**

### **Rights Reserved**

Career Path Services reserves the right to:

- Reject any or all bids received
- Not award a contract for any reason
- Negotiate with any qualified bidder
- Award a contract to more than one bidder
- Award only a portion of the scope of work
- Cancel or modify this RFB at any time
- Waive or modify any informalities, irregularities, or inconsistencies in the bids received
- Request clarification or additional information from bidders

### **Cost of Preparing Bid**

Costs of developing the bid are solely the responsibility of the bidder. Career Path Services shall provide no reimbursement for such costs. Any costs associated with any oral presentations shall be the responsibility of the bidder and shall in no way be billable to Career Path Services.

### **Federal Compliance Notice**

Career Path Services complies with 2 CFR 200.214 procurement standards for possible suspension or debarment of vendors who may receive federal funds. All prospective vendors will be vetted through SAM.gov and ofac.treasury.gov to determine their status for consideration of this contract. Any prospective vendor who is currently suspended or debarred from receiving federal funds cannot be considered and the application process will end.

### **Stevens Amendment Notice**

This project is supported by federal funds. In accordance with Public Law 100-463, Section 8136, upon award of contract, any publications, presentations, or other public communications related to this

project must include appropriate acknowledgment of federal funding support. Up to 95% of this project may be federally funded, with the remainder funded through non-governmental sources. Specific dollar amounts and final percentages will be determined upon a contract award and must be included in all required notices.

### **Submission Instructions**

All bids must be submitted electronically to [info@careerpathservices.org](mailto:info@careerpathservices.org)

### **Email Requirements:**

- Subject line must include: "RFB - [Title of Project] - [Company Name]"
- All attachments must be in PDF format
- Maximum email size including attachments: 25MB
- Multiple emails may be sent, if necessary, with clear labeling (e.g., 1 of 3, 2 of 3, etc.)

### **Submission Requirements:**

- All required bid elements must be included and clearly labeled
- Include a table of contents
- Number all pages sequentially
- Include authorized signature page
- Submit any proprietary or confidential information in a separate, clearly marked file

### **Questions and Communication:**

- All questions must be submitted via email to [info@careerpathservices.org](mailto:info@careerpathservices.org)
- Questions will be answered within two business days
- Responses will be shared via email with all bidders who have submitted letter of interest
- Questions will not be accepted after March 10, 2025, 12:00 PM
- Include RFB title in all communication subject lines

Late submissions will not be accepted. Career Path Services is not responsible for technical issues that may prevent timely submission. Bidders are encouraged to submit well in advance of the deadline to avoid any potential delays.

Career Path Services is an equal opportunity employer. Auxiliary aids and services are available upon request to persons of disability. TTY relay 1-800-833-6388