



**5601 WILKINSON BOULEVARD
CHARLOTTE, NORTH CAROLINA 28208
(704) 359-4000**

**REQUEST FOR PROPOSAL
RFP AVIA #24-08: SUCCESSION PLANNING FRAMEWORK & RELATED CONSULTING SERVICES
ADDENDUM #1
OCTOBER 5, 2023**

This Addendum is hereby made a part of the specifications, as applicable, of the above referenced project. All other requirements of the original plans and specification shall remain in effect in their respective order. Acknowledge receipt of this addendum by inserting its number and date on Form #1 of your proposal.

General Note:

Requests for interpretation or clarification must be submitted electronically to the RFP Project Manager via the e-bidding portal Q&A Board no later than 5:00 p.m. edt on Monday, October 9, 2023.

Questions received are answered as follows:

1. What is the estimated budget for this Engagement?

CLT estimates \$250,000 over the life of the contract and understands that the costs may be higher in the first year and decrease in subsequent years.

2. What is the duration of this Engagement?

The term of the Contract shall be for three (3) years with two optional one-year renewals. This Work will be ongoing and may require follow up training to support the program.

3. What is the specific MWSBE goal for this Contract?

For Service contracts, CBI goals are negotiated with the awarded firm(s). CBI Form 3 (Services) must be submitted with a firm's bid package.

Charlotte Douglas International Airport (CLT), a City of Charlotte department does not discriminate on the basis of disability. We will provide auxiliary aids and services, written materials in alternative formats, and reasonable modifications in policies and procedures to persons with disabilities upon request. To make a request, please email genetta.carothers@cltairport.com.

Pre-Proposal Meeting Presentation





SUCCESSION PLANNING FRAMEWORK AND RELATED CONSULTING SERVICES

RFP AVIA 24-08

Pre-Proposal Conference
October 5, 2023 at 9:00 AM EDT

AGENDA

- Housekeeping Items
- Introductions and Attendance
- Submission Requirements
- Bid Format (Required Forms)
- Selection Criteria
- Addenda and Proposer Questions
- eBuilder Bid Portal
- CBI Program Requirements
- Scope Summary
- Closing

HOUSEKEEPING ITEMS

- The purpose of this conference is to present information found in the Request for Proposal (RFP).
- RFP clarification questions will only be accepted and answered by submission through the e-Builder e-bidding portal's Q&A board. Answers to be provided via addendum.
- You may email Genetta.Carothers@cltairport.com with questions regarding the operation of e-Builder.
- Today's presentation will be included with addendum.
- Vendor registration and related information:
<https://www.charlottenc.gov/Growth-and-Development/Doing-Business/Vendor-Registration>

INTRODUCTIONS AND ATTENDANCE

- Presenters:
 - Genetta Carothers – RFP Manager
 - Alison Mitchell (Project Manager) / Gail Hagler (Project Support) – Organizational & Talent Development
 - Claire Butler – Business Diversity & Development Manager
- Meeting Attendance:
 - Please be sure to capture your attendance (i.e. name, company name, and email address) in the chat.

SUBMISSION REQUIREMENTS

Submission Requirements:

- Companies must submit ONE (1) original and complete proposal in searchable Adobe Acrobat .pdf format, signed in ink, or digitally signed.
- Proposals must have standard text no smaller than twelve (12) points.
- Please combine all documents into one submission packet.
- Please name your file using twenty (20) characters or less.
- Please share username and password among co-workers.
- Proposals must be submitted through the eBuilder Bid Portal, using the link provided within the RFP document. CLT will not accept submissions through any other means (i.e. – mailed, faxed, emailed, hand delivered, etc.)

Proposal Submission Deadline:

- Monday, October 23, 2023 at 12:00 PM EDT (per CLT's clock)
- The bid portal will close promptly at 12:00 PM EDT. **Late submissions will not be accepted.**
- Please notify Genetta Carothers via email Genetta.Carothers@cltairport.com if you experience issues using the bid portal. All other questions must be submitted through the Q&A link in the bid portal.
- DO NOT wait until the last minute!

Target Dates:

- Estimated start date is January 1, 2024.



PROPOSAL FORMAT (REQUIRED FORMS)

Proposals shall consist of the following forms:

- Form 1, Proposal Form
- Form 2, Qualifications and Proposer Requirements
- Form 3, Nondiscrimination Certification
- Form 4, CBI Program Requirements
- Form 5, Confidential Information
- Form 6, Pricing Worksheet

All required forms must be completed, signed and uploaded

SELECTION CRITERIA

Experience	CLT will evaluate the plan against the requirements outlined in RFP, Paragraph 7 and Form 2.
Operations Plan	CLT will evaluate this plan against the requirements outlined in RFP, Paragraph 7 and Form 2, Section E.
Staffing Plan	CLT will evaluate the plan against the requirements outlined in RFP, Paragraph 7 and Form 2, Section F.
Compensation	CLT will evaluate the Proposer on the overall compensation proposed related to the provision of the Work. Compensation proposed related to the provision of the Work.
References	CLT will evaluate the plan provided as outlined in RFP, Paragraph 7 and Form 2, Section D.

ADDENDA AND PROPOSER QUESTIONS

- All addenda will be posted to the e-Builder bid portal, the City of Charlotte website and broadcast through Public Input.
- Questions and Answers will be included in addenda for the benefit of all proposers.
- Questions must be submitted in written form through the eBuilder Bid Portal Q&A board.
- Deadline for submitting written questions will be on Monday, October 9, 2023 at 5:00 PM EDT.
- Answers via addendum will be posted no later than 12:00 PM EDT; Friday, October 13, 2023.

EBUILDER BID PORTAL

e-Builder Bid Portal
A TRIMBLE COMPANY

Enter Username

Enter Password

LOGIN

Forgot Password

Are you a first time bidder?

Create Account

For product support information →

- Please use the link provided in the RFP to access the eBuilder Bid Portal.
- **PLEASE NOTE:** The eBuilder link is the “Invitation Key”.
- If this will be your first-time logging into the eBuilder bid portal, you will need to create login credentials.
- Use Chrome or Firefox as your browser when accessing the bid portal (do not use Internet Explorer).

EBUILDER BID PORTAL

Bid Packages **My Profile**

Charlotte Douglas International Airport (CLT) / Solicitations 100 Administrative Services & HR
↳ RFP AVIA 24-08 Succession Planning Framework and Related Consulting Services

Status

Bid Package	Open
Bidding	Pending
Response Submitted	No

20 Days 21 Hours 47 Minutes Left


Due on 10.23.2023 at 12:00 PM
(GMT-05:00) Eastern Time (US & Canada)




Package Invitation **Response Form** **Q&A Board**

Accept **Decline**

Bid Info **Invitation Documents (1)** **Addenda**

Hide All | Show All

Click this icon  to download files. Clicking the icon next to a folder will download all files and subfolders within it.

File / Folder Name	Uploaded on	File Size
  Solicitation Documents (1)	09.20.2023 10:31 AM	
 RFP AVIA 24-08 Succession Planning Services.pdf Version 1	09.26.2023 4:18 PM	461.52 KB

Locate
proposal
documents
here

EBUILDER BID PORTAL

Bid Packages My Profile

Charlotte Douglas International Airport (CLT) / Solicitations 100 Administrative Services & HR

↳ RFP AVIA 24-08 Succession Planning Framework and Related Consulting Services

Status	
Bid Package	Open
Bidding	Pending
Response Submitted	No

19 Days 1 Hours 15 Minutes Left

Due on 10.23.2023 at 12:00 PM
(GMT-05:00) Eastern Time (US & Canada)

Package Invitation Response Form **Q&A Board**

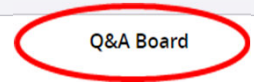
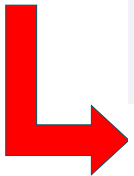
[Submit Question](#) [Export](#)

[View List](#) | [View All](#)

View	Subject	Questionee	Date & Time
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Note: The date and time are shown in the bid time zone.

Submit Questions here



EBUILDER BID PORTAL

The screenshot shows the EBUILDER Bid Portal interface. At the top, there are tabs for "Bid Packages" and "My Profile". The main heading is "Charlotte Douglas International Airport (CLT) / Solicitations 100 Administrative Services & HR". Below this, a breadcrumb trail shows "RFP AVIA 24-08 Succession Planning Framework and Related Consulting Services".

There are two main panels. The left panel is titled "Status" and contains a table:

Bid Package	Open
Bidding	Pending
Response Submitted	No

The right panel is titled "20 Days 21 Hours 8 Minutes Left" and contains the text: "Due on 10.23.2023 at 12:00 PM (GMT-05:00) Eastern Time (US & Canada)".

Below these panels are three buttons: "Package Invitation", "Response Form" (circled in red), and "Q&A Board". A blue "Submit Quote" button is located below the "Response Form" button.

A red arrow points from a yellow box on the left to the "Submit Quote" button. A warning icon and text are visible below the buttons: "Please note that only one file can be uploaded."

Submit Proposal
Click here

This box will appear to upload submission packet here

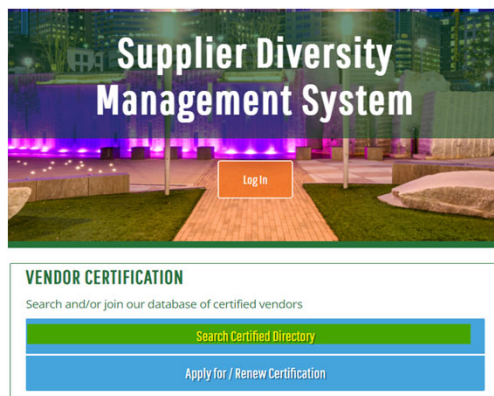
The "Upload Files" dialog box is shown. It has a title bar with "Upload Files" and a close button. The main area contains a dashed box with the text "Drag and drop files here to upload, or browse." and a blue upload icon. At the bottom, there are "Upload" and "Cancel" buttons.

Reminder:

- Upload as one (1) file
- File name 20 characters or less
- Don't wait until the last minute!

CHARLOTTE BUSINESS INCLUSION PROGRAM(CBI)

- **Project Goal:**
 - The City will negotiate CBI participation with the awarded firm(s)
- **CBI Form 3 must be completed and submitted with Bid Package**
 - Link to CBI Form 3: [CBI Form 3 \(Services\): Subcontractor/Subconsultant Utilization Form](#)
 - All subcontractor / subconsultants firms plan to utilize should be included on Form 3
- Information on the CBI Program can be found at: www.charlottebusinessinclusion.com
- Search for MWSBE firms: <http://charlotte.diversitycompliance.com>:
 - Certified MBE, SBE, and WBE firms will count for participation on this project



Certified Directory

Search City of Charlotte Certified Directory by entering search terms and clicking Search. You must select at least one certification type.

Search by Certification Type

CERTIFICATIONS

- Minority Business Enterprise (MBE)
- Small Business Enterprise (SBE)
- Women Business Enterprise (WBE)
- Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)
- Disadvantaged Business Enterprise (DBE)
- Historically Underutilized Business (HUB)

SCOPE SUMMARY

Summary: The scope of this contract shall be to provide Succession Planning Framework and Related Consulting Services to CLT.

Expectation: To seek a consultant who can deliver a practical and comprehensive succession plan that is realistic for our business and employee population and can be adapted as needed and maintained by CLT Staff.

Services scope of work: CLT is seeking proposals from capable consultants with expertise in delivering succession planning framework and related consulting services. The initiative pertains to pivotal roles including executive, directorial, and other vital positions, where seamless and effective personnel transitions are paramount to sustain operational efficiency. Leveraging existing internal talent to bridge transitional gaps and preserving indispensable operational insights, knowledge and procedures stand as imperative objectives for CLT.

THANK YOU!



CLT™