



## **REQUEST FOR PROPOSAL (RFP)**

### **CABARRUS COUNTY OPIOID SETTLEMENT FUNDS: COLLABORATIVE STRATEGIC PLANNING**

**Proposal Submission Deadline: September 15, 2023, at 5:00 p.m. EST**

Cabarrus County will receive proposals as described herein. The County reserves the right to reject any or all proposals. All changes to the terms, conditions or specifications stated in this Request for Proposal (RFP) will be documented in a written addendum posted to the County's website.

Questions regarding the RFP may be emailed to Cabarrus County Behavioral Health Director, Aalece Pugh-Lilly, at [apugh@cabarruscounty.us](mailto:apugh@cabarruscounty.us).

## 1. Project Description

Cabarrus County (“County”) is requesting proposals from consulting firms to guide and execute a strategic plan around the County’s allocation of NC Opioid Settlement Funds.

North Carolina is part of two historic national agreements, collectively totaling \$47 billion, that will bring desperately needed relief to communities affected by opioids. The funds are part of two settlement agreements (dispersed through two waves of funding) with distributors, manufacturers, and retailers of prescription opioid medications. In total, North Carolina is slated to receive nearly \$1.4 billion in settlement funds between 2022 and 2035. [North Carolina’s Opioid and Substance Use Action Plan](#), developed by North Carolina’s Department of Health and Human Services in partnership with other entities, lays out “concrete strategies to advance prevention, reduce harm, and connect people” to needed care to address the harmful effects associated with opioid misuse and dependence. Statewide, settlement funds were allocated proportionally based on where the opioid crisis was most severe (i.e., # of pills dispensed, # of opioid overdose deaths, and # of people suffering from opioid use disorder – NC Dept. of Health & Human Services).

Cabarrus County is an ever-changing, mid-sized metropolitan area, just north of Mecklenburg County and the City of Charlotte. Per Census.gov, Cabarrus’ population as of July 2022 was estimated at 235,797, reflecting an increase of nearly 60,000 residents in the preceding 12 years. Current demographics of Cabarrus County are as follows: 51% female, 49% male, 68.2 % White, 21.8% Black, ~12% Hispanic or Latino, 6.5% Asian, and 0.7% American Indian (some overlap between categories). Adults between the ages of 18 and 64 represent 55% of the population, whereas youth between ages 5 and 17 (24.8%) are the second largest age group.

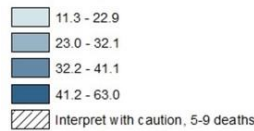
Cabarrus County stands to receive \$21,886,625 over 18 years (2022 to 2038) in settlement funds, which includes an allocation to the City of Concord that was re-assigned to Cabarrus County to manage. Settlement funds will be front-loaded, and amounts received will vary by year. In FY 22-23, Cabarrus received \$1,393,979. Cabarrus is slated to receive \$3,019,067 in FY 23-24.

Cabarrus County has been hard hit by the opioid epidemic, outpacing state statistics with respect to overall overdose deaths (see chart below). Moreover, according to the [Cabarrus Health Alliance](#), “in July and August of 2017, Cabarrus County led the state in per capita Emergency Department (ED) admissions related to prescription opioid or heroin overdoses...Cabarrus remained among the top five counties for the remainder of the year, dropping from the top 10 in January 2018 but reappearing again as number four the following month (North Carolina Injury and Violence Prevention Branch).” As such, the strategic planning process is essential to seek the collective voice of the Community regarding the best ways to address this profound issue. Ideally, the initial phase of planning will lead to a funding plan covering the next 3 - 5 years.

**Rate of Medication & Drug Overdose Deaths, All Intents**  
Per 100,000 North Carolina Residents, 2017-2021



All Intent Medication/Drug Overdose Deaths,  
Rate per 100,000 NC Residents, 2017-2021



| Rate of Medication/Drug Overdose Deaths per 100,000<br>North Carolina Residents, 2017-2021 |      |
|--|------|
| Cabarrus   | 30.1 |
| Statewide  | 27.6 |

Technical Notes: Rates are per 100,000 NC residents; All intent medication and drug poisoning : X40 -X44, X80 -X84, Y10 -Y14, X85  
Source: Deaths -NC State Center for Health Statistics, Vital Statistics; Population -National Center for Health Statistics  
Analysis by Injury Epidemiology and Surveillance Unit



NCDHHS, Division of Public Health | County Overdose Slides | Data final through 2021

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This map shades the counties of NC based on their respective **all intent medication/drug** overdose death rate. The statewide rate was 27.6 per 100,000 residents from 2016-2020. This five-year period was used in order to provide greater reliability in county-level rate estimates. – NC Dept. of Health & Human Services

Developers of NC’s plan have strongly encouraged use of a strategic planning process to ensure residents, stakeholders, individuals with lived experience, and community partners provide input on use of funds to local governments. In accordance with the [North Carolina Memorandum of Agreement \(MOA\)](#), the Collaborative Strategic Planning process can be leveraged to help coordinate a plan to do the following:

- Identify goals, measures, and an evaluation plan
- Identify key indicators
- Engage diverse stakeholders
- Agree on shared vision
- Identify and explore root causes
- Identify gaps in existing efforts
- Prioritize strategies

More information related to the Collaborative Strategic Planning process is available [here](#) and [here](#).

Proposals must meet all applicable federal and state regulatory and accreditation standards.

## 2. RFP Submission Requirements

Proposals will be received, in electronic format only, by Aalece Pugh-Lilly at [apugh@cabarruscounty.us](mailto:apugh@cabarruscounty.us). **All proposals must be delivered by 5:00 pm local time on Friday, September 15, 2023.** Firms accept all risk of late delivery regardless of fault. **Late proposals will not be accepted.** All submitted proposals received by the deadline become the property of Cabarrus County.

At a minimum, the submission must consist of the following:

### A. Letter of Transmittal

The proposal must include a letter of transmittal attesting to its accuracy, signed by an individual authorized to execute a binding legal document on behalf of the organization.

**B. Executive Summary**

Please provide a summary describing the overall proposal. Include the following information:

- High-level information about your firm
- Your firm’s knowledge of the national opioid settlement agreement(s)
- Your firm’s knowledge of the [NC Opioid and Substance Use Action Plan](#) and the [NC Memorandum of Agreement](#)
- Your firm’s experience guiding similar processes for other NC municipalities/governments

**C. Scope of Work**

Please provide a detailed description, relaying your organization’s professional experience and ability to guide Cabarrus’ strategic planning process around use of settlement funds. Describe generally what your organization is planning to do in accordance with outlined [Collaborative Strategic Planning](#) activities. This section should include a detailed implementation plan for Cabarrus that will commence by calendar year’s end, leading to a viable 3–5-year funding plan. Please include a timeline of proposed activities.

**D. Organizational Background and Expertise**

Submissions shall demonstrate experience and competency around strategic planning and related activities. As such, please provide the following:

- A description of your philosophy and approach to projects of this nature
- A description of your plan to engage and recruit varied voices and stakeholders in the process
- A description of your experience working with local governments, boards, and elected officials
- A description of your budget/cost model and timeframe to initiate and complete the requested service

**E. References**

Provide at least two (2) references for comparable projects.

**3. Schedule of Events**

The table below shows the intended schedule for this RFP. The County will make every effort to adhere to this schedule.

| Event                             | Date                                     |
|-----------------------------------|--|
| Request for Proposal (RFP) issued | Monday, August 7, 2023                   |
| Written questions deadline        | Friday, September 1, 2023                |
| Proposal deadline                 | Friday, September 15, 2023, by 5:00 p.m. |

**4. Schedule of Events Details**

**A. Vendor Questions**

Upon review of the RFP document, organizations may submit questions for additional clarity. Questions shall be emailed to [apugh@cabarruscounty.us](mailto:apugh@cabarruscounty.us) by Friday, September 1, 2023, at 5:00 p.m. Firms should

use “Cabarrus Opioid Settlement Funds” as the subject for any emails. Responses to questions received by the deadline will be posted as an addendum to the RFP on the County’s website.

**B. Submission of Responses**

Responses may be submitted electronically to Aalece Pugh-Lilly at [apugh@cabarruscounty.us](mailto:apugh@cabarruscounty.us). Responses sent by any other means will not be accepted.

**C. Proposal Opening**

Staff will not open proposals received after the due date. Proposals will not be read aloud or made available to inspect or copy until any trade secret issues/proprietary and/or confidential information has been resolved and a contract has been awarded.

**5. Proposal Evaluation Criteria**

Proposals will be evaluated on the ability to meet the requirements of this RFP. Special emphasis will be placed on the proposed firm’s experience and qualifications completing similar projects.

Evaluation criteria include the following:

- The firm’s experience guiding strategic planning processes
- The firm’s ability to complete the project within the requested timeframe
- The firm’s ability to engage a diverse array of participants
- The firm’s experience working with local governments
- The firm’s description of deliverables
- The firm’s ability to render the service at a reasonable cost to the County

A. **Qualifications, experience, and approach:** Understanding, experience, and qualifications in performing the same or substantially similar services.

B. **Financial capability:** Ability to meet the financial requirements of performing the same or substantially similar services.

C. **Cost:** Ability to provide the service at a reasonable cost

D. **Ability to comply with County/State/Federal requirements:** Ability to comply with all legal and state requirements and regarding the Collaborative Strategic Planning process and use of settlement funds.

E. **Ability to comply with County contracting requirements:** Organizations will be required to sign a contract agreement with the County and register through the PaymentWorks platform.

**6. Terms and Conditions**

The County reserves the following rights and options, which may be exercised at the County’s sole discretion:

- To, at its sole discretion, reject any or all proposals submitted in response to the RFP. The County shall not be liable for any costs incurred in connection with the preparation and submission of any bid
- To supplement, amend, substitute, or otherwise modify this RFP at any time

- To cancel the RFP
- To conduct investigations with respect to the evaluation criteria for one or more potential contractors
- To require potential contractors to supplement, clarify or provide additional information for the County to evaluate the proposals submitted
- To discuss or meet with one or more potential contractors to facilitate arriving at a Contract that will be satisfactory to the County, including but not limited to financial terms
- To award all, none, or any part of the Services that is in the best interest of the County, to one or more of the potential contractors responding, which may be done without re-solicitation
- To reject any or all proposals, waive any defect or irregularity, and to award a contract based upon the proposal(s) that are determined to be in the best interest of the County
- All bid submissions become the property of the County once submitted