

REQUEST FOR PROPOSALS
For
Economic Recovery and Resiliency Planning Services



**Northeast Ohio Four County Regional
Planning and Development Organization (NEFCO)**

PROPOSAL SUBMITTAL DATE, TIME & LOCATION:
February 14, 2022 – 5:00pm EST

EMAIL QUESTIONS TO: nick@nfcoplanning.org

Proposals will only be accepted electronically

OVERVIEW

The Northeast Ohio Four County Regional Planning and Development Organization (NEFCO) is seeking a qualified vendor to assist NEFCO staff with executing and completing a regional economic recovery and resiliency (ER&R) planning process and ER&R Plan document and satisfying the requirements and deliverables of NEFCO's U.S. Economic Development Administration (EDA) CARES Act grant. The CARES Act grant and all required deliverables must be completed before June 30, 2022.

NEFCO seeks the assistance of an experienced vendor that can help NEFCO complete a planning process it started in 2020. The experienced vendor should have a team who understands public sector comprehensive planning, regional councils of government, economic development planning, meeting facilitation, and report compilation to assist NEFCO and its constituent governments with completing all of services and deliverables identified in this RFP.

NEFCO shall follow the federal *Small Purchase Procedure* procurement method. Under this method of selection, NEFCO will receive proposals from interested parties until the date and time set forth in this request. NEFCO will review and rank all proposals according to a list of criteria set forth in this request. NEFCO is a council of governments and is tax exempt.

GENERAL INSTRUCTIONS

- 1) Interested parties must submit a .pdf electronic file of the proposal within the time period indicated for submission.
- 2) NEFCO will accept proposals until **February 14, 2022 – 5:00pm EST**.
- 3) Submission of a proposal will be considered as conclusive evidence of the interested party's complete examination and understanding of the specifications as provided by NEFCO.
- 4) Proposals received after the time and date specified will not be considered and will be deemed unresponsive.

GENERAL TERMS AND CONDITIONS

- 1) NEFCO reserves the right to reject any and all proposals in whole or in part without penalty and not to issue a contract as a result of this RFP.
- 2) The award shall be made to the interested party who submits a responsive proposal that NEFCO believes, in its sole discretions, best meets the objectives of the project outlined herein and is in the best interests of NEFCO. In evaluating which proposal best meets the objectives of the project outlined herein and is in the best interests of NEFCO, NEFCO will consider, without limitation, any of the following: proposal price, quality, service capabilities, performance analysis, reference checks, fiscal stability and longevity of the providing vendor. This list is not all-inclusive or exhaustive.
- 3) All proposals will be reviewed by NEFCO to determine compliance with administrative requirements and instructions specified in this RFP. The interested party is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive. Ambiguous proposals, which are uncertain as to terms, delivery, quantity, and/or compliance with specifications, may be rejected or otherwise disregarded. NEFCO may, in its sole discretion, waive any or all technicalities or requirements as deemed appropriate.
- 4) NEFCO encourages participation in all of its contracts by firms certified as Minority and/or Women's Business Enterprises or similar certifications (MWBE). However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award and proposals will not be rejected or considered non-responsive on that basis.
- 5) NEFCO reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the interested party can propose. There will be no best and final offer procedure.
- 6) The successful interested party should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the interested party's

proposal.

- 7) Interested parties and/or their representatives shall direct all inquiries and all other communications regarding this proposal to Nick Lautzenheiser, NEFCO Economic Development Planner. All questions shall be in electronic mail in order to forward the answers to all interested parties. No oral answers to proposal questions shall be permitted. This shall ensure fairness and give all interested parties an equal opportunity to be considered.
- 8) Any addenda to the proposal documents will be issued in writing. No oral statements, explanations or commitments shall be of any effect unless incorporated in the addenda.
- 9) NEFCO reserves the right to contact interested parties individually for the purpose of clarifying proposals and/or requesting additional information.
- 10) NEFCO, at its discretion, may request an interview and demonstration from proposing companies. Submission of a proposal does not guarantee a request for an interview.
- 11) NEFCO is not liable for any cost incurred by the interested parties in connection with the development and submittal of their proposals.
- 12) NEFCO shall take the amount of time, in its discretion, necessary to thoroughly review submissions in order to arrive at an award decision. NEFCO will notify the apparent successful interested party of their selection in writing via email upon completion of the evaluation process. Individuals or firms whose proposals were not selected for further negotiation or award will be notified separately by e-mail or facsimile.
- 13) No work shall be assigned to sub-vendors and/or third parties without the written approval of NEFCO.
- 14) This RFP does not obligate NEFCO or its members to contract for the services specified herein.

ABOUT NEFCO

NEFCO was formed in 1974 as a regional council of governments by the elected officials within Portage, Stark, Summit and Wayne Counties. NEFCO was created as a voluntary organization to enable local officials to discuss problems facing the region and to develop strategies to respond to challenges. NEFCO serves as a forum through which local, state and federal planning programs can be more effectively coordinated.

In 1978, NEFCO was designated as an Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration (EDA). As an EDD for the region, NEFCO receives EDA funding to manage the Comprehensive Economic Development Strategy (CEDS). The CEDS is locally-based, regionally-driven planning process and plan document designed to build capacity and guide regional economic prosperity and resiliency. Preparation and maintenance of the CEDS maintains NEFCO's status as an EDD and the region's eligibility for EDA grant funding. NEFCO will incorporate the ER&R Plan document into the CEDS to guide regional economic recovery and resiliency.

DELIVERABLES

The following deliverables should be completed and submitted to NEFCO in electronic format. The proposal should provide a description or outline of the work plan and reports that are part of the deliverables for the project. At a minimum, the following project deliverables are expected:

- 1) Organize data and information gathered by NEFCO over the past 18 months into a planning document (analysis of data, completed surveys and responses, meeting notes, etc.)
- 2) Assist NEFCO with the facilitation of public, committee, subcommittee, and other meetings associated with the regional economic recovery and resiliency planning process and in the development of an ER&R Plan document
- 3) Assist NEFCO with the completion of a regional ER&R Plan document including, but not limited to:
 - a. An ER&R Plan outline/table of contents
 - b. A compilation of background information and data – meeting notes, survey forms, survey responses, etc.

- c. An analysis of economic and demographic data;
 - d. An analysis of pre- and post-pandemic conditions;
 - e. A preparation of the region's strengths, weaknesses, opportunities, and threats (SWOT) analysis;
 - f. An action plan with short-term recovery projects and programs and long-term resiliency strategies, and which includes a matrix with – at a minimum - the following components:
 - Project/program identification and listing
 - Project/program location (county, city, etc.)
 - Cost
 - Funding source(s)
 - Timeline for implementation
 - Responsible party(ies)
 - Desired outcome(s)/goal(s)
 - Consistency with/correlation to NEFCO CEDS Plan goal(s)
 - g. Graphs, charts, maps, photos, images, and other graphical displays – aesthetic and intuitive graphical display of data and information to enhance the ER&R Plan document. Vendor shall include software to be employed and capabilities/ proficiencies of staff
 - h. References/sources cited
 - i. Listing of staff, Board, committee, and subcommittee member listing
 - j. Glossary or index of terms
 - k. Other appendices, as applicable
- 4) Review other examples of completed comprehensive economic recovery and resiliency plans from around the U.S.
 - 5) Ensure consistency of ER&R Plan with NEFCO's Comprehensive Economic Development Strategy
 - 6) Include presentation-quality graphics, including charts, maps, tables, photographs and imagery, etc.
 - 7) Assemble and complete ER&R Plan document. The final ER&R Plan document is to be in an electronic format (PDF).
 - 8) Provide other ER&R planning services, as assigned by NEFCO

TIMELINE FOR DELIVERABLES

The vendor will work with NEFCO staff to complete all the deliverables listed above in a timely manner in order to meet the grant deadlines, as required by the EDA. The vendor shall meet the following deadlines for the ER&R planning program deliverables:

- 1) Review and organization of existing ER&R planning data and information – March 1-31, 2022
- 2) Outline for ER&R Plan – March 31, 2022
- 3) Attend and help facilitate ER&R Subcommittee meetings (3 total meetings) – April 2022
- 4) Draft Action Plan – May 12, 2022
- 5) Attend and help facilitate Regional CEDS Committee – May 19, 2022
- 6) Draft ER&R Plan for review by Regional CEDS Committee – June 1, 2022
- 7) Draft ER&R Plan for review by NEFCO General Policy Board – June 8, 2022
- 8) Attend and provide presentation of ER&R Plan to NEFCO General Policy Board – June 15, 2022
- 9) Final ER&R Plan – June 22, 2022

GUIDING PRINCIPLES

Execute an impactful ER&R planning process and ER&R Plan document, which helps the NEFCO region understand and respond to the impacts of the pandemic by recommending short-term recovery projects and programs and long-term resiliency strategies. This process will be guided by the following principles:

- 1) Establish our ER&R planning process which engages communities and organizations throughout the NEFCO region;
- 2) Ensure that the ER&R Plan includes actionable steps to foster recovery and promote regional resiliency;

- 3) Ensure that the ER&R Plan includes measurable outcomes and evaluation metrics; and
- 4) Ensure that the ER&R Plan fully integrates with NEFCO CEDS Plan, NEFCO website, and other media

BUDGET DETAILS

NEFCO estimates the budget for this project will be approximately sixty thousand dollars (\$60,000.00). While we prefer the most cost-effective solution, all reasonable proposals will be considered and weighed based on their merits.

INTERESTED PARTY QUALIFICATIONS

NEFCO will evaluate the interested party's experience, qualifications, and capabilities for providing economic recovery and resiliency planning services. The desired qualifications are outlined below. Interested parties are required to submit a written narrative **corresponding to each of the underlined section items**:

Introduction

- Overview and summary of how interested party will assist NEFCO in providing economic recovery and resiliency planning services.

Interested Party Profile

- Interested party overview and history.
- How long has the interested party provided comprehensive and/or economic development planning services?
- Number of current employees; number of employees with planning and/or economic development background.
- Capabilities and credentials of interested party - Why should you be chosen?
- Management team – Name, title, credentials, experience, role, etc.
- Software to be employed and capabilities/proficiencies of staff

Scope of Work

- Project phase deliverables.
- What will be expected of NEFCO?
- What NEFCO can expect from the interested party?

Project Development Approach

- Approximate timeline start date is March 1, 2022.
- Approximate timeline end date is June 30, 2022.
- Detailed explanation of all project phases including compilation and synthesis of data, development of ER&R Plan outline, development of action plan, and development of ER&R Plan document drafts.
- Detailed explanation how vendor shall assist with subcommittee and other meeting facilitation with development of ER&R Plan document.
- What role will NEFCO play in the project?

Content Ownership Acknowledgement

- Acknowledgement of NEFCO's ownership of all planning document content and data.

Planning Services Pricing Estimate/Cost for Services Outlined

Specify amounts of items below:

- Planning Services:
 - (a) Data compilation and synthesis
 - (b) Meeting assistance and facilitation
 - (c) Development of action plan

(d) Additional services

- ER&R Plan document development and publishing

Governmental Comprehensive and/or Economic Development Planning Services and Experience (if applicable)

References (minimum three references, including all contact information below)

- Client name
- Website URL
- Client contact person and title
- Client Phone
- Client Email address

EVALUATION CRITERIA

Proposals will be evaluated on the following components:

- 1) Overall proposal
- 2) Responsiveness of submittal to the RFP
- 3) Qualifications of project team; required skills and demonstrated capabilities
- 4) Knowledge of NEFCO and the NEFCO region
- 5) Understanding of the project and the objectives
- 6) Experience with similar projects, particularly public sector projects
- 7) Experience with comprehensive and economic development plans and planning strategies
- 8) Project deliverable completion timeline
- 9) Proposal cost/budget
- 10) References

PROPOSAL CONSTITUTES OFFER

By submitting a proposal, the interested party agrees to be bound by all the requirements, terms and conditions set forth in this proposal document. A proposal containing variations from the requirements, terms and conditions set forth herein may, at the sole discretion of NEFCO, be declared non-responsive. The requirements, terms and conditions set forth in this document will become part of the successful vendor's contractual obligations upon award of the contract.

The interested party understands that quoted prices are inclusive of all costs and that no additional costs, incidental or otherwise shall apply.

INTERESTED PARTY NAME

FED. ID NUMBER

W/MBE (YES or NO)

AUTHORIZED SIGNATURE

PRINTED SIGNATURE

BUSINESS ADDRESS

CITY, STATE AND ZIP CODE

TELEPHONE NUMBER

E-MAIL ADDRESS

NEFCO PRICING WORKSHEET
For
Economic Recovery and Resiliency Planning Services

Pricing (ER&R Planning Services and ER&R Plan Document Development):

ER&R Planning Services Costs \$ _____

ER&R Plan Document Development Costs \$ _____

Other Fees and Charges \$ _____
(explain in detail)

Total ER&R Planning Services and ER&R Plan Development Cost* \$ _____

I authorize that all pricing stated in this proposal document is correct and binding.

Authorized Signature: _____

Printed Signature: _____

Name of Interested Party: _____

Date: _____ / _____ / _____

*NEFCO is a council of governments (tax-exempt organization). Proposals should not reflect sales tax.