



Greater Owensboro  
ECONOMIC DEVELOPMENT CORPORATION

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Making Owensboro Greater

## **REQUEST FOR PROPOSALS FOR STRATEGIC VISIONING AND PLANNING**

### **PURPOSE**

The Greater Owensboro Economic Development Corporation (GOEDC) has initiated a Request for Proposal (RFP) process to identify a qualified consultant to guide and execute a strategic visioning and comprehensive planning process.

### **WHO MAY RESPOND**

GOEDC seeks a consultant who has demonstrated experience in successfully developing economic development strategic plans, has strong facilitation skills, has proven experience with non-profit strategic planning, and a strong understanding of the structure and purpose of economic development.

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## 1. About the Organization

Located on the Ohio River in northwest Kentucky. The Owensboro, Daviess County region is home to a diverse industry base, healthcare, automotive, paper, aluminum, agriculture, utility and more. Building an environment of fostering new business creation, growth and success has been achieved in research and cutting-edge technologies.

The Owensboro MSA (Daviess, Hancock and McLean Counties) is part of the Green River Area Development District and is fortunate to have excellent access to the best riverfront and industrial properties in the state. Our partnerships with surrounding communities, north and south of the Ohio River, have allowed for capitalization on the strengths of our region.

The Greater Owensboro Economic Development Corporation (GOEDC) is a public/private funded organization that operates on a \$700,000 annual budget. The GOEDC partners with citizen and educational groups to help foster community involvement in education and advocate for great school systems. Business, labor, government and the private sector work together with area educators to ensure high quality learning experiences for each student.

Owensboro's regional labor market area boasts a well-educated, diverse workforce of approximately 400,000 plus. Area workers are not just skilled; they are filled with an incomparable work ethic. Greater Owensboro has four colleges and three school systems in the Owensboro area and one school system in the Hancock County area.

The region is accessible by road, river and rail. Three Interstates; I-165, I-64, and The Audubon Parkway (Future I-69 Spur). The 340-acre Owensboro Riverport Authority is the largest and most profitable public port in Kentucky. The Owensboro/Daviess County Airport has both an 8,000- and 5,000-foot runway.

Owensboro is a dynamic community that strives for diversity. The community believes education is key to a better economy. The community has put into place initiatives to help develop and grow our workforce to meet the demands of businesses and industries.

More information on the organization is available at <https://edc.owensboro.com/>

## 2. Project Overview

GOEDC is governed by a Board of Directors (32 directors) representing the Greater Owensboro Region. The Board is led by an Executive Committee (9 directors) who provide policy direction and work closely with the President/CEO to oversee implementation. GOEDC currently employs 4 full-time staff members.

## 3. Scope of Work and Deliverables

We expect the project to include the following:

- Project management
- Design and execution of a strategic visioning and comprehensive planning process
- Develop an actionable strategic plan, including a projected budget for implementation
- Develop recommendations regarding the plan's implementation and support structure

The proposal should include:

- Understanding of the work to be performed, estimated hours, and other pertinent information.
- Organization description, size and structure.
- Qualifications of all staff to be assigned to the project and specify the project manager.
- Resumes of staff to be assigned to the project. Education, position in firm, years and type of experience, continuing professional education, etc., will be considered. Vendor is not able to sub-contract out any of the work without the pre-approval of the sub-contractor by GOEDC.

It is expected that these tasks will be accomplished through a combination of activities, including:

- Background research by consultant on GOEDC history and current leadership team, including environmental scan of organization and opportunities ahead.
- Benchmarking our organizations with other similar sized economic development organizations.
- Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner and community input.
- Facilitated group meetings with the board and staff to create consensus regarding a strategic vision and plan.

## 4. Project Goals and Target Audience

While GOEDC seeks the consultant's recommendations regarding the best process to develop an actionable strategic plan, the organization envisions the scope of work being completed in stages.

### Stage 1. Discovery – Vision and key goals with GOEDC Board

This stage includes consensus building among the GOEDC Board members to:

- Discover a shared strategic vision that:
  - Is clearly stated
  - Is compelling
  - Is timely
  - Describes a clear and present need
  - Motivates people to act
  - Is a worthwhile challenge

## **Stage 2. Research and Validation – Needs assessment, gap analysis, SWOT analysis, research, etc.**

This stage should produce the substantive documentation and solutions needed for validation of discovered vision and key goals and inform the strategic planning process.

## **Stage 3. Identify strategic goals and write the strategic plan, including detailed budget**

After the discovery and research phases, stage 3 entails the identification of key strategic goals and the development of an actionable strategic plan that will serve as the overall blueprint for our work. This plan should include:

- An executive summary
- A comprehensive, detailed plan that identifies:
  - Shared vision
  - Goals
  - Objectives
  - Strategies
  - Tactics
  - Responsible partners and their roles
  - Measures
  - Outcomes
- This plan should also include:
  - Resource development strategies
  - Initial communications strategies (what are the key messages? Who are the targets for those messages? How are the messages delivered? Who delivers the messages?)

## **Stage 4. Development of implementation recommendations**

This stage includes the development of recommendations regarding the implementation phase of GOEDC's work. Included within this phase should be a detailed budget to implement the plan and methods of measuring successful implementation.

## **5. Ownership and Confidentiality**

All intellectual property will become the property of GOEDC. All data remains the sole property of the organizations. The vendor shall further agree to keep information related to any and all contracts with GOEDC in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with us.

## **6. Proposal Format**

To best evaluate the ability of the vendor to meet our goals, please include the following in your proposal:

- Examples of similar projects and goals achieved
- Approach to strategic planning
- Summary of strategic planning experience
- Three client references
- Suggested project timeline with major tasks and milestones
- Project budget by line item
- Sample project plan
- Identify who will be involved on your project team, their role, and including their relevant experience.

## **Proposal – Must include the following:**

### **General information**

GOEDC understands that the scope of work requested may be conducted by a single consultant, a consultant group, or by a partnership of consultants. The proposal should provide the name, title, address, telephone number, and email address for each person engaged in the project. If a consultant group or partnership of consultants, the proposal should indicate who will serve as the point person.

### **Consultant Qualifications and Roles**

The proposal must describe the consultant's qualifications to conduct the RFP scope of work activities, expertise, knowledge, and experience. Experience should include examples of conducting similar or related work (i.e., working with other collaborative or collective impact initiatives to create a strategic vision and strategic plan), as well as experience working with non-profits, rural and small-metro communities, and regional development organizations.

To accomplish the scope requested, the consultation will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process
- Knowledge of budgeting
- Knowledge of marketing, communications and branding
- Knowledge of resource development
- Ability to constructively challenge key stakeholders
- Experience inspiring others to think innovatively
- Project management experience

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

### **Work Plan**

The proposal should contain a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:

- The specific activities to be conducted at each stage,
- A timeline for the activities at each stage,
- Milestones and deliverables tied to those activities, and
- A detailed budget for each task, along with a proposed payment scheduled tied to project milestones and/or deliverables.

### **References**

The proposal should include at least three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number and email address.

### **Previous Work Product**

The proposal should include at least two examples of written work similar to the scope of work requested within this RFP (e.g., strategic plan).

## **7. Scoring**

Proposals will be reviewed and evaluated based on the following criteria:

- **Qualifications**
  - Consultant has the qualifications necessary to successfully complete the scope of work
  - The consultant has prior experience working on similar projects
  - The consultant has prior experience working with similar organizations
  
- **Scope of Proposal**
  - The proposal demonstrates an understanding of the project objectives and desired results
  - The proposal illustrates an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan
  - The proposal illustrates the consultant's ability to successfully execute the proposed approach
  - The proposal includes an appropriate process to interact with committee members
  
- **Work Plan**
  - The proposal adequately details project activities and milestones, or deliverables associated with each stage of the scope of work
  - The proposal includes a detailed timeline for each stage
  - The work can be completed within a reasonable project timeline
  
- **Budget**
  - The proposal includes a detailed budget for each stage of the scope of work
  - Proposed costs are reasonable

## **8. Process for Proposal Submission and Evaluation**

### **a) Closing submission Date**

Proposals are due by 5:00 PM CST on Friday, June 19<sup>th</sup>, 2020.

### **b) Inquiries**

Inquiries concerning this RFP should be directed to Brittany Johnson (contact information below)  
Brittany Johnson, President/CEO [Bjohnson@owensboro.com](mailto:Bjohnson@owensboro.com)

### **c) Conditions of Proposal**

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by GOEDC and the GOEDC Research Foundation.

#### **d) Submission Instructions**

Proposals should be submitted in PDF format via email to [bjohnson@owensboro.com](mailto:bjohnson@owensboro.com) before the closing submission date. If the file is too large for email, a link to the file should be provided.

Late arrivals will not be accepted. Mail submissions will not be accepted.

It is the responsibility of the bidder to ensure that the response is received by GOEDC by the closing submission date. A response may be judged nonresponsive and excluded for further consideration if it is not received by the deadline or does not follow the specified format.

#### **e) Right to Reject**

GOEDC reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

#### **f) Small Businesses, Minority-Owned Firms, and Women's Enterprises**

GOEDC encourages small businesses, women's business enterprises, and/or minority-owned firms to respond.

#### **g) Confidentiality**

If the bidder deems any material submitted to be proprietary or confidential, that must be indicated in the relevant section(s) of the response.

#### **h) Notification of Selection and Timeline**

It is expected that a bidder will be selected within two to three weeks of the closing submission date, although this timeline is subject to change. GOEDC reserves the right to cancel this RFP at any time. Upon conclusion of negotiations with the successful bidder, all bidders submitting responses to this RFP will be informed in writing of the name of the successful firm or individual.

RFP Released: June 8<sup>th</sup>, 2020

Proposals due: June 19<sup>th</sup>, 2020

Vendor selection made: July 10<sup>th</sup>, 2020

Project begins: August 2020

#### **i) Criteria for Selection**

GOEDC will select the proposal which it feels will deliver the highest quality deliverable at the best value. Proposals will be initially reviewed by the President/CEO. Selection of vendor will be made by the Steering Committee with input from the President/CEO. Finalist will be interviewed by the Steering Committee through a Zoom Call.

Price will be significant, but not the only, criteria in evaluating the proposals. Consideration will also be given to the following:

- Ability of the bidder to provide all aspects of the proposal.
- Compliance of the vendor and proposal with the project requirements outlined above.
- The extent to which the proposed deliverable meets the scope and goals outlined in the RFP.
- Experience with similar organizations and portfolio of work.

The award will be made to the qualified bidder whose proposal is most advantageous to GOEDC with price and other factors considered.

GOEDC, in its sole discretion, may request proposal presentations by meeting with any or all bidders to clarify or negotiate modifications to proposals. However, GOEDC reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the bidder can propose.

GOEDC contemplates award of the contract to the responsible Bidder with the most cost-effective solution and the capabilities to perform the contract services.

#### **j) Conflict of Interest**

The Bidder must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the Contract or the services provided under the Contract. Except as otherwise disclosed in the proposal, the Bidder affirms that to the best of its knowledge there exists no actual or potential conflict between the Bidder, the Bidder's project manager(s) or its family's business or financial interests ("Interests") and the services provided under the Contract. In the event of any change in either Interests or the services provided under the Contract, the Bidder will inform GOEDC regarding the possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to the GOEDC's satisfaction or the Bidder may be disqualified from consideration under this RFP. As used in this Section, "conflict of interest" shall include, but not be limited to, the following:

1. Giving or offering a gratuity, kickback, money, gift, or anything of value to a GOEDC official, officer, or employee with the intent of receiving a contract from GOEDC or favorable treatment under a contract;
2. Having or acquiring at any point during the RFP process or during the term of the contract, any contractual, financial, business or other interest, direct or indirect, that would conflict in any manner or degree with Bidder's performance of its duties and responsibilities to GOEDC under the Contract or otherwise create the appearance of impropriety with respect to the award or performance of the Contract; or
3. Currently in possession of or accepting during the RFP process or the term of the Contract anything of value based on an understanding that the actions of the Bidder or its affiliates or Interests on behalf of GOEDC will be influenced.