



Montana's Next Generation Economic and Community Development Tools

An analysis to redefine the Essential Economic and Community Development Tools and Strategies to Drive Montana's Economic Future

REQUEST FOR PROPOSAL



Request for Proposal

Next Generation Economic and Community Development Tools

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Background

In 1999, Montana, with both administration and legislative support, developed a set of programs and funding tools to encourage the economic development of our state. Those tools have served Montana well - impacting businesses statewide. While our efforts have been important and impactful, in many ways these programs have been the minimum necessary, and they are limited in their response to current and future economic conditions and market forces influencing Montana.

With heightened regional competition for private investment, business attraction, and workforce demands, Montana Economic Developers Association (MEDA) believes now is a critical time to evaluate and create a new forward-looking strategic approach for the economic development game-plan for Montana. A game plan that acknowledges technology innovations and changing market forces in our diverse urban, rural, and native economies. We believe that thriving communities mean a successful, growing Montana economy.

Now is a critical time for Montana to create a forward-looking economic development plan that will support the needs of our communities and will build capacity to enhance the impact of our local and statewide efforts.

Purpose/Invitation

MEDA and its partners seek to retain a qualified entity(s) to perform original work in the analysis and development of a plan that would articulate and support a proposed Next Generation of Economic and Community Development Tools. The plan should outline the current set of tools available for Montana's economic and community development, evaluate the emerging economic and community development opportunities and challenges facing Montana communities, assess our competition to understand the best practices that are influencing economic and community development outcomes among our regional and aspirational peer states/communities. With that analysis in hand, the plan should offer guidance and recommendations for the Next Generation of Economic and Community Development Tools (proposed programs, policies, or resource commitments at the state and local levels) that would effectively encourage Montana's economic growth, with analysis of how such tools might be developed, funded, and deployed and what the potential outcomes may be for Montana.

This RFP invitation is seeking proposals from qualified entity(s) to meet the Scope of Work, including the stated objectives and deliverables. MEDA and its partners will support this effort by helping to engage key stakeholders from throughout the state in the analysis and appropriate input/dialogue processes. It is our hope that this work will be forward-thinking, better match the current and emerging challenges and opportunities facing Montana, and provide a fresh perspective on the necessary tools for the thoughtful economic and community development for the communities we all serve and thereby all of Montana.

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Respondents to this RFP will provide all of the services to MEDA as described in the Scope of Work.

Scope of Work

The objectives of this planning effort include, but are not limited to:

1. Identify and define the challenges facing Montana's economic and community development.
2. Identify and define the opportunities facing Montana's economic and community development.
3. Research the current economic and community development strategies that are driving growth and how those strategies impact Montana's economic future.
4. Analyze, evaluate, and benchmark the current economic and community development strategies that are driving growth and how those strategies impact Montana's economic future.
5. Identify best practices among our progressive regional and national competitors relevant to economic development in Montana.
6. Identify the essential economic and community development tools, programs and funding mechanisms that best respond to Montana's future opportunities and challenges for economic growth.
7. Define how these "best practices" (identified in No. 5 above) are initiated and supported.
8. Identify key findings from the analysis and propose Montana's Next Generation of Community Development and Economic Tools recommendations.
 - a. Include support materials and or examples of how the recommended tools work and implementation strategies that will work within the state of Montana.

Deliverables

The deliverables of the planning effort include, but are not limited to:

1. Key findings of the challenges facing Montana's economic and community development.
2. Key findings of the opportunities facing Montana's economic and community development.
3. A conditions assessment that highlights the current development strategies, tools, programs, and funding mechanisms.
4. Key findings of best practices / competitive analysis on our regional / national competitors relevant to economic development in Montana. Include compelling examples, data and case studies.
5. Articulation of roles within successful EDOs, local communities and state economic development teams.

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6. Key findings followed by recommendations (MT NextGen) that give future guidance to MEDA, its partners and key decision makers for strategic community and economic development programs, practices, funding structures for both near-term and long-term initiatives.
7. Provide an implementation strategy for recommendations (6) that offers an appropriate timeline, considers a phasing approach, identifies essential partners and “immediate next steps”.

Expectations

1. All deliverables for the Next Generation Economic and Community Development Tools strategy for Montana are expected to be presented in written and electronic form.
2. Presentations to the MEDA Board / Membership and identified key partners will be expected. This could include up to three presentations.
3. Some measure of in-person field work and scoping in Montana will be expected.
4. All supporting data, case studies and best practice analysis that meet the stated Scope of Work are to be included.

Submittal Contents and Sequence

Consultants interested in providing services must prepare and submit an electronic proposal (one PDF document) that includes the required content as below. Note page limits.

1. **Cover Letter** (not to exceed two pages)
 - a. This will serve as the cover of the proposal and is to include the name of the firm along with contact information for the Officer and Project Manager of the firm that will be leading the contracted work.
 - b. Each proposal must be signed by an officer of the firm who can be held accountable for all representations.
 - c. The proposer shall designate one contact person who will be the representative of the economic development services vendor(s) to which MEDA will respond.
2. **Consultant Team Proposal** (not to exceed three pages)
 - a. Brief history of firm to include date of establishment.
 - b. Description of areas of expertise and capacity to manage projects of this type, size and scope.
 - c. Description of relevant prior experience. (electronic examples will be accepted)
3. **Key Personnel** (not to exceed 1 page per personnel resume)
 - a. Include proposed project management structure
 - b. Identify key contact
 - c. Include personnel abilities, credentials, qualifications and relevant experience.
 - d. Identify any subcontractors (if needed) along with qualifications and experience.

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- e. There can be no change of key personnel once proposal is submitted without prior approval of MEDA.*
- 4. Project Understanding & Approach** (not to exceed four pages)
 - a. Provide a concise description of project understanding.
 - b. Provide a concise description of work approach.
 - c. Provide a concise description of methodology.
 - d. Provide a concise description of intended outcomes.
- 5. Project Schedule** (not to exceed one page)
 - a. Propose a general timeline for completion including start date, milestones and target date of completion.
- 6. References** (not to exceed one page)
 - a. Each reference must include the following
 - i. Name of Project and Client.
 - ii. Contact information, title, phone number and email address.
 - iii. Project start and completion dates.
 - iv. Brief summary of project.
 - v. If applicable - techniques utilized in following study and outcomes.
- 7. Fee proposal** (not to exceed one page)
 - a. Provide a detailed fee proposal by objective for the services identified in the Scope of Work.
 - b. Identify any sub-tasks not listed in Scope of Work
 - c. Include hourly fees per key personnel

Submittal Requirements

- **Proposals must be received electronically before September 24, 2019, by 5:00pm, MST.**
- **Interested Applicants are strongly encouraged to participate in a pre-proposal conference call on September 9th, 2019 at 11am MST** (audio-only call with anonymous muted participants).

All questions, correspondence and proposals will be directed to:

Attn: Gloria O'Rourke (MEDA Board)

118 E. Seventh St., Suite 3F

Anaconda, MT 59711

Phone: 406.563.5259

Email: gloria@medamembers.org

Instructions:

1. All questions pertaining to the RFP should be submitted, via email, by September 5, 2019, to Gloria. Questions submitted after this date will not receive a response.

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2. MEDA will respond to all submitted questions on this information sharing conference call. **Please confirm your participation by contacting Gloria at 406.563.5259 for the conference call dial in information.**
3. Complete proposals must be received no later than September 24th, 2019 at 5:00PM MST. Proposals received or submitted after the deadline will not be considered.

Schedule

Distribute / Advertise RFP	August 23, 2019
Deadline for questions	September 5, 2019
Pre-Proposal Conference Call	September 9, 2019
Electronic submittal due date	September 24, 2019

Discretion and Liability Waiver

MEDA reserves the right to exercise discretion and apply its judgment with respect to all proposals submitted.

MEDA reserves the right to reject all proposals, either in part or in its entirety, or to requests and obtain, from one or more of the consulting firms submitting proposals, supplementary information as may be necessary for MEDA to analyze the proposals.

MEDA may elect to award a contract in multiple phases, as is deemed to be in MEDA's best interest. Should MEDA award projects in phases, MEDA reserves the right to award the phases to the same firm.

The consultant, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP. Although, it is MEDA's intent to choose only a small number of most qualified consulting teams to interview with MEDA, the MEDA Selection Committee reserves the right to choose any number of qualified finalists.

This RFP does not commit MEDA to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP or to procure or contract for work.

All proposals submitted in response to this RFP become the property of MEDA.

MEDA reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to: selection procedures, submittal date, and submittal requirements. If MEDA cancels or revises the RFP, all interested firms will be notified using email.