

The Rhode Island Division of Planning and Grow Smart RI seek proposals for services related to Grow Smart RI's 2012 Planning Challenge Grant

**REQUEST FOR PROPOSAL
STRATEGIC PLANNING AND EVALUATION PLANNING PROCESS FACILITATION**

Grow Smart RI Land Use Training Collaborative
9/26/2012

A. Deadline for receipt:

1. Wednesday, October 25, 2012
2. Proposal must be delivered by 4pm on the date listed above, via mail or courier, to Grow Smart RI and addressed to Jodi Castallo, Training Coordinator, Grow Smart RI, 235 Promenade Street, Suite 550, Providence, RI, 02908. Proposals misdirected to other locations or which otherwise are not received by Grow Smart RI by the established due date for any cause will be determined to be late and will not be considered.

B. Public Opening of Proposals

All submitted proposal packages will be opened in the Grow Smart RI offices, located at 235 Promenade Street, Suite 550, Providence, RI, 02908 at 9am Eastern Standard Time on October 26, 2012 and the names of those who have submitted proposals will be read.

C. Inquiries:

Inquiries can be sent by email to: jcastallo@growsmartri.com.

1. Pre-proposal meeting (attendance at the pre-proposal meeting will in no way influence the selection process): Tuesday, October 9, 2012 at 1pm; Room 300, The Foundry, 235 Promenade Street, Providence, RI, 02908.
2. Questions and answers presented at the pre-proposal meeting or asked and answered by email will be posted to the Grow Smart RI website (<http://www.growsmartri.org/>).

D. Background

The Land Use Training Collaborative (Collaborative) is a coalition effort to assure appropriate coordination among local, regional, and state entities in delivering land-use related training to Rhode Island audiences. The overall goal of the Collaborative is to increase municipal and overall capacity in Rhode Island to deal with increasingly complex land-use issues and shape growth to meet the community's vision. The

Collaborative is over ten years old and has developed 34 different programs which have been attended by more than 2,700 participants. Program attendees include planning and zoning boards, other municipal committees and boards, municipal staff, state agency staff, the development and design community, and the public. The workshop topics have ranged from training for volunteer boards and commissions and municipal staff on the skills necessary for effective review of development projects and the writing of sound decisions to detailed discussion of specific community planning issues and strategies. The workshops generally run anywhere from 3 to 6 hours. Some workshops provide AICP credits.

As a leader of the Collaborative, Grow Smart RI:

- secures funding for the Collaborative;
- manages program and materials development;
- schedules training programs and markets programs to appropriate audiences; and
- manages record-keeping and budgeting, bookkeeping, consultant contracts, vendor relations

Partnering organizations do some or all of the following:

- help to identify and prioritize program needs;
- contribute to the development of new programs and materials;
- provide staff to serve as presenters at different programs;
- help to publicize programs; and
- provide funding support

The current members of the Collaborative are:

- American Planning Association/RI Chapter
- Aquidneck Island Planning Commission
- Blackstone River Valley National Heritage Corridor Commission
- Housing Network of Rhode Island
- Housing Works RI
- Local Initiatives Support Corporation
- Narragansett Bay Research Reserve
- Partnership for Community Development
- Housing Network/Roger Williams University
- RI Builders Association
- RI Department of Environmental Management
- RI Division of Planning/Statewide Planning Program
- Rhode Island Housing
- RI Land Trust Council
- RI League of Cities & Towns
- RI Water Resources Board

- URI Coastal Resources Center/ URI Sea Grant
- URI Cooperative Extension Program
- US Green Building Council – RI Chapter
- Washington County Regional Planning Council

Changing conditions have created new challenges and opportunities for land use planning in Rhode Island and the Collaborative. In order to better serve Rhode Island municipalities and the professionals working on land use issues, the Collaborative plans to: 1) undertake a Strategic Planning process and 2) develop evaluation instruments that the Collaborative can use on an on-going basis to assess the long term impacts of individual workshops and the program's impact on land use planning.

Grow Smart RI has received a Planning Challenge Grant from the Rhode Island Statewide Planning Program to fund the work outlined in the below Scope of Services. Therefore, all work must be done in accordance with the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases Home Page by Internet at <http://www.purchasing.ri.gov/>.

E. Scope of Services

The Collaborative is seeking a strategic planning and evaluation consultant or consulting team to develop a 5- year strategic plan that will guide the Collaborative's community planning and education efforts. A Strategic Plan and Evaluation Advisory Committee (Advisory Committee) composed of members of the Collaborative and other training stakeholders has been formed. The Advisory Committee will work with the consultant in the development of the strategic plan, and some or all of the Advisory Committee will work with the consultant on the evaluation process. Grow Smart RI staff will serve as the local manager and organizer of the Advisory Committee.

The strategic planning process should include developing a shared vision, a needs assessment, assessment of the capacity and roles of the member organizations, setting priorities, and selecting strategies.

In addition to the development of the strategic plan, the consultant will work with all or a subset of the Advisory Committee to develop an evaluation process to measure and evaluate the effectiveness of future Collaborative efforts.

We are particularly interested in incorporating a logic model as part of the strategic plan and evaluation work.

Grow Smart RI, on behalf of the Collaborative, is hiring a consultant to perform the following tasks:

1. DEVELOP A 5-YEAR STRATEGIC PLAN

Task 1.1: Preliminary Tasks

Grow Smart RI will provide the consultant with previous needs assessments and other pertinent materials. The consultant will review and familiarize him/herself with this material.

The consultant will prepare a draft strategic planning process outline, including the logic model and detailed timeline, in consultation with Grow Smart RI staff, based on the general timeline.

- a. Task 1.2 within one month of hire date
- b. Final Strategic Plan completed by the end of June, 2013
- c. Final Evaluation Plan completed by the end of September, 2013.

Deliverable: Overall process outline and timeline

Task 1.2: Meeting - Determine Strategic Planning Process

The consultant will meet with the Advisory Committee to review and discuss the draft process for developing the strategic plan. The consultant will take comments and suggestions from the Advisory Committee and incorporate them into the final outline and timeline for the Strategic Plan.

Note: Throughout the project Grow Smart RI will be responsible for scheduling/handling logistics for all Advisory Committee meetings and conference calls.

Deliverable: Finalized outline of strategic planning process, including a timeline that includes specific deadlines for each task.

Timeframe: To be completed within one month of hire date

Task 1.3: Organizational Assessments

Assessing the available resources and skills of agencies and organizations that offer training and technical assistance, as well as the environment in which organizations operate, is important. The assessment of the capacity and roles of the Collaborative members and other related organizations will be an organizational self-assessment based on a set of pre-determined questions. The consultant will design a draft and final instrument for this task.

Grow Smart RI staff will take responsibility for:

1. Distributing the draft instrument for comment to the Advisory Committee, directing responses to the consultant.
2. Facilitating the development of a list of organizations to survey and finalize that list.
3. Distributing the final instrument to the agreed upon list of organizations.
4. Doing a follow-up necessary to ensure desired level of response.
5. Collecting the results of the survey and do any necessary analysis.

Deliverable: Final survey for organizational assessment.

Task 1.4: Develop Needs Assessment Instrument and Process

The consultant will develop a needs assessment instrument and process. We envision this including an electronic survey, interviews, and/or focus groups. In the development of the instrument, the consultant will work with the Advisory Committee to determine the appropriate target audience for the needs assessment, as well as the most appropriate format for the instrument to best understand the target audience's needs. The needs assessment instrument will be developed by the consultant and reviewed prior to finalization by the Advisory Committee and Grow Smart RI staff. The consultant will also work with the Advisory Committee to determine the most appropriate process for conducting the needs assessment to obtain a high amount of usable data.

Deliverables: Final needs assessment instrument and outline of needs assessment process; meeting, email communications, and/or conference calls as needed

Task 1.5: Perform Needs Assessment

Using the needs assessment instrument developed under Task 1.4, the consultant will execute the needs assessment. Once the needs assessment has been completed, the consultant will be responsible for analyzing and tabulating the results of the assessment and formatting the results into a brief summary report.

Grow Smart RI and the Advisory Committee staff will provide any email lists required for the needs assessment and assistance with follow-up to insure the desired level of response.

Deliverables: Completed needs assessment and summary report

Task 1.6: Meeting – Organizational Assessment Results and Needs Assessment Results

Upon the completion of Task 1.5, the consultant will facilitate a meeting of the Advisory Committee to discuss the results of the organizational assessment and the needs assessment.

Deliverable: Meeting of the Advisory Committee

Task 1.7: Strategic Planning

The consultant will facilitate meetings of the Advisory Committee as necessary to complete the strategic planning process outlined in Task 1.2, incorporating the use of a logic model.

Deliverables: Meetings, conference calls, and email communications of the Advisory Committee

Task 1.8: Draft Strategic Plan

The consultant will prepare a draft of the strategic plan for review by the Advisory Committee and Grow Smart RI staff.

Deliverable: Draft strategic plan

Task 1.9: Meeting – Review of Draft Strategic Plan

The consultant will facilitate a meeting of the Advisory Committee to review the draft strategic plan, solicit final comments and discuss the plan's implementation.

Deliverable: Meeting of the Advisory Committee

Task 1.10: Final Strategic Plan

The consultant will revise the draft strategic plan based on the outcomes of Task 1.9.

Deliverable: Final strategic plan

2. DEVELOP AN EVALUATION PLAN INCLUDING EVALUATION INSTRUMENTS AND PROCESS

Task 2.1: Meeting – Evaluation Plan Development

The consultant will facilitate a meeting of all or a subset of the Advisory Committee to discuss the development of the evaluation plan. It is expected that this meeting will include a discussion of the purpose, goals, outcomes and audience of the evaluation plan.

Deliverable: Meeting of the Advisory Committee

Task 2.2: Development of Evaluation Recommendations

Based on the discussion of Task 2.1, the consultant will develop recommendations for evaluation methods, data analysis and reporting.

Deliverable: Recommendations for evaluation methods, data analysis and reporting

Task 2.3: Meeting – Review of Recommendations

The consultant will facilitate a meeting of the Advisory Committee to review, discuss and develop consensus about the recommendations developed under Task 2.2.

Deliverable: Meeting of the Advisory Committee

Task 2.4: Draft Evaluation Plan

The consultant will prepare a draft evaluation plan for review by the Advisory Committee and Grow Smart RI staff, based on the outcomes of the meeting held as part of Task 2.3.

Deliverable: Draft evaluation plan

Task 2.5: Meeting – Review Draft Evaluation Plan

The consultant will facilitate a meeting of the Advisory Committee to review the draft evaluation plan, solicit final comments and discuss the plan's implementation.

Deliverable: Meeting of the Land Use Training Collaborative

Task 2.6: Final Evaluation Plan

The consultant will revise the draft evaluation plan based on the outcomes of Task 2.5.

Deliverable: Final evaluation plan

F. Proposal Content Requirements

The Collaborative is accepting proposals from experienced Consultants to facilitate the process outlined above. Applicants may recommend amendments to the process, timeline, and/or tasks. The available funding for this project is \$17,500.

Please send 6 of copies and include an electronic copy on CD.

Proposals must include the following:

1. A cover letter providing a brief description of the firm(s) or individual(s), including the name, business mailing address, telephone number, and email address of principal contact person.
2. Executive summary of the highlights of the proposal, not to exceed one page in length, and conveying the consultant's understanding of the purpose and expected outcomes of the project.
3. A list of key personnel who will be involved in the process and their expertise/experience. Including resumes of the firm's principals and professional staff who will work directly with the Advisory Committee. If a sub-contractor(s) will be used, please identify the name of the firm(s), which person(s) will be involved and the firms' MBE status.
4. A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractor(s) will have demonstrated expertise in working with non-profits and civic organizations as well as experience in strategic planning and program evaluation.
5. A work plan that includes a description of the methodology, tasks, timeline and estimated total amount of time that would be spent on the project per task and overall.
6. Exclusions or exceptions. The proposal shall note any parts of the scope of services that are beyond the expertise of the consultant, or that the consultant believes would be better handled by GSRI staff.
7. A schedule of costs that includes consulting (cost per task), supplies, number of on-site visits and cost per trip, and other costs associated with the planning process. Costs for the data gathering and analysis associated with the needs

assessment must be listed separately. Proposal costs submitted will be considered firm and fixed.

8. References and contact information for three (3) organizations for which the consultant has provided strategic planning services and three (3) organizations for which the consultant has provided services for the design of evaluation instruments.

G. Instructions and Notifications:

1. Proposals must be in accordance with the terms of this Request for Proposals and the State's General Conditions of Purchase, which can be obtained at the Rhode Island Division of Purchases home page: www.purchasing.ri.gov.
2. All costs associated with developing or submitting documents in response to this request and/or in providing oral or written clarification of its content shall be borne by the respondent. Grow Smart RI assumes no responsibility for these costs.
3. All pricing submitted should be considered firm and fixed unless otherwise indicated herein.
4. Firms interested in submitting proposals to provide such services are required to follow the recommended guidelines and instructions contained in this Request for Proposals.
5. Respondents are advised that all materials submitted to Grow Smart RI for consideration will be considered to be public record as defined in Title 38, Chapter 2 of Rhode Island General Laws, without exception, and will be released for inspection immediately upon request once the award is made.
6. In accordance with Title 7, Chapter 1.2-1401 of the General Laws of Rhode Island, no foreign corporation, meaning a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State at (401)222-3040. This is a requirement of all selected service provider(s) and any sub-consultant(s).
7. Utilization of Minority Business Enterprises as certified by the RI Minority Business Enterprise Compliance Office is a requirement. This project is subject to Chapter 37-14.1 of the Rhode Island General Laws, and regulations promulgated there under, which require that ten percent (10%) of the total dollar value of work performed on this project be performed by a minority business enterprise. Participation must be demonstrated at time of bidding. A listing of MBE firms is available at www.mbe.ri.gov.

8. Equal Employment Opportunity (RIGL 28-5.1)§ 28-5.1-1 Declaration of policy. –
 - (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation.
9. Grow Smart RI, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, sex, or national origin in consideration for an award.
10. All material developed by the consultant(s) will be the property of Grow Smart RI. The Rhode Island Statewide Planning Program reserves a royalty-free, non-exclusive, and irrevocable license to reproduce, publish, or otherwise use, and to authorize others to use, for state or federal government purposes, the copyright in any work developed under the grant or through a contract under the grant.

H. Evaluation and Selection Criteria

1. Proposal Content- 40 points
 - Responsiveness of the written proposal to the purpose and scope of the project.
 - Proposed methodology and timeline for carrying out tasks in the scope of work.
2. Qualifications- 30 points
 - Demonstrated knowledge, skills, and experience in conducting strategic planning and evaluation projects.
 - Knowledge of and experience in using logic models.
 - Ability to meet deadlines and operate within budget.
 - Demonstrated ability, based on references, to design and implement strategic planning and evaluation process and meet deadlines.
3. Cost – 30 points

I. Contract Award Timeline

1. Proposal must be received by Wednesday, October 25, 2012. The public opening will be held at 9am on Thursday, October 26, 2012.
2. Schedule:
 - 9/25/2012- RFP posted
 - 10/9/2012- Pre-proposal meeting
 - 10/25/2012- Responses due
 - Week of 10/29/2012- Interviewees notified
 - Week of 11/5/2012- Interviews
 - Week of 11/12/2012- Consulting firm selected and confirmed; contracted signed.