



CITY OF EDMONDS, WASHINGTON

REQUEST FOR PROPOSALS (RFP) FOR A STRATEGIC PLAN

Issued April 20, 2011

City of Edmonds, Washington Request for Proposals (RFP) for a Strategic Plan

The City of Edmonds is seeking a qualified person or firm to contract for consulting services to guide a citywide Strategic Planning process. **The deadline for submittals is 4:00 p.m. on May 12, 2011.** See below for specific information and requirements.

SUBMIT PROPOSAL TO:

City of Edmonds
Community Services and Economic Development Department
c/o Stephen Clifton, Director
121 – 5th Avenue North
Edmonds, WA 97005
425-775-7724

ABOUT THE CITY

Edmonds is located within the Seattle metropolitan area and is home to a population of 40,900. Celebrated as an arts community, Edmonds is also known for its charming downtown area, excellent schools, beautiful public parks and beaches, attractive residential neighborhoods, and public marina.

Edmonds is strategically located along the shores of Puget Sound, midpoint between the Cities of Seattle and Everett. Edmonds enjoys direct access to two major highways (104 and 99), and connections to mass transit via Sound Transit commuter rail, AMTRAK regional rail, Washington State Ferries, and Community Transit bus system. The City is home to more than 1706 (2010) businesses including Swedish Edmonds Hospital and the Port of Edmonds. The majority of Edmonds' employment falls within four categories, i.e., Retail, Government, Professional/Science/Technical, and Health Care.

Edmonds operates under the Strong Mayor-Council form of government as set forth in RCW 35A.12.

More information about the City is available on our website at www.ci.edmonds.wa.us/rfp.stm.

BACKGROUND

In the past two decades, the City of Edmonds has engaged the public in a variety of efforts to shape the community's future via the City of Edmonds Comprehensive Plan, Transportation Plan, Economic Development Plan, Parks, Recreation and Open Space Plan, the Community Cultural Plan, etc., and specific community projects. This being said, an overarching comprehensive strategic planning and visioning process for the community has not been accomplished.

In recent years, the community has expressed increasing interest in creating a community wide vision and strategic plan. On June 2, 2009, the Edmonds City Council passed Ordinance 3735,

which amended the Edmonds City Code, Title 10, adding a new Chapter 10.75 Citizens Economic Development Commission.

On January 19, 2010, a Combined Economic Development Commission and Planning Board 2009 Annual Report was submitted to the City Council, and presentations were given by the Edmonds Economic Development Commission and Planning Board Chairs during the City Council meeting. The combined report contained six recommended higher priority initial proposals as part of a multi-faceted approach; as no single proposed strategy, policy, or program can assure success for the community or fix the problem. One of the proposals was for the “City Council to commit to developing a strategic plan, then reviewing/updating every year, ideally corresponding to the City Council’s annual retreat; this includes setting goals and continually assessing progress metrics” and to “develop a community vision that addresses a balance between quality of life and growth objectives while furthering Edmonds’ “green” initiatives”.

On March 16, 2010, the Edmonds City Council approved Resolution 1224, which expressed support for the Edmonds EDC Commission to move forward with its six higher priority recommendations. On December 2010, the City Council expressed strong support by approving funding to pay for a strategic planning process and plan.

WHAT THE CITY IS LOOKING FOR

The City of Edmonds is seeking sealed proposals from qualified persons or firms to contract for consulting services to guide a Strategic Planning process for the City. Consultants are invited to submit a proposal which includes an outline of their experience and qualifications in performing work directly related to the services required.

Strategic planning determines where an organization is going over the next few years or more and how it's going to get there. A Strategic Plan is intended to help the City direct its efforts and resources toward a clearly defined vision for its future. The plan should include benchmarks or milestones that measure the City’s progress along the way.

Edmonds is interested in having this plan completed proactively and transparently with community acceptance. The process should allow for both active and passive involvement ensuring diverse and extensive community participation. While the details of the strategic planning process are to be determined and negotiated with the chosen consultant, a four step process to be considered may include:

- 1) Setting Direction (Environmental Scan and Vision)
- 2) Focusing Efforts (Goals and Priorities)
- 3) Implementation (Citywide/Department Plans)
- 4) Reporting (Progress).

A strategic plan is a “living document” and should undergo periodic review and adjustment to reflect progress towards achievement of goals and/or modifications of goals. As a process and eventual working document, the Edmonds Strategic Planning process and final document should provide a plan with 5, 10 and 20 year horizons to address the following issues:

- Help the City of Edmonds decide what it wants to be in the future, including identification of what makes Edmonds unique and special, and how the City can position itself to be prepared for the future while still retaining those qualities.
- Transform the conceptual goals of the visioning process into realistic, achievable targets.
- Encourage engagement and spark the interest and excitement of active/passive residents, business & property owners, city officials/ administration and staff, and others in the future potential of the City.
- Provide a process that allows general alignment and focus of the City Council, City administration, and staff, in addition to citizens, business interests, community groups, etc. to foster a sense of cohesion as to the City's strategic direction.
- Evaluate existing and future public facilities and services; priorities, phasing; help identify how City resources should be allocated and how to maintain customer service levels.
- Generate new ideas and discussion about the built environment, sustainability, sense of place, and the City's overall identity.
- Chart an effective, considered, and innovative course of action for the City's future, setting priorities and maximizing innovative opportunities.
- Serve as a way to organize and prioritize City initiatives and resources to achieve specific goals within a specific period of time, e.g., 3 - 6 year timeframe in the short term, and 7 - 20 year timeframe in the long term, with specific performance measures.
- Recognize economic development potential and ways to diversify the local economy.
- Identify and analyze potential partnerships with other entities; (such as public/public, public/private) and encourage significant private investment in the limited redevelopment opportunities in the City.
- Plan for fiscal sustainability.

Through this planning process, the City is also interested in the successful prioritization of services and the following objectives:

- Ability to evaluate the services we provide, one versus another.
- To better understand our services in the context of the cause-and-effect relationship they have on the organization's priorities.
- To provide a higher degree of understanding among decision makers as they engage in a process to rank services based on priorities.
- Articulate to people within the City and to the public how we value our services, how we invest in our priorities, and how we divest ourselves of lower-priority services (if necessary).

A preliminary flow chart and proposed schedule are attached to this RFP for informational purposes only.

SCOPE OF SERVICES

Please see Attachment A.

QUALIFICATIONS

Any combination of skills and experience that can successfully and effectively address the scope of services.

PROCESS FOR QUESTIONS

For questions regarding the City's RFP process or the services being sought, please contact Community Services and Economic Development Director Stephen Clifton via email at Clifton@ci.edmonds.wa.us or via telephone at (425) 771-0251, up to 5:00 p.m. on May 5, 2011 (see also submittal requirements).

PROCESS AND TIMELINE FOR SELECTION

The City's process and timeline for selection of a Consultant are as follows:

April 27, 2011 at 2:00 – 3:00 p.m. – Presubmittal Conference

This will be an opportunity for potential candidates to ask questions and obtain information about the RFP process and the Strategic Planning process. Attendance is optional. The Pre-submittal Conference will be held at Edmonds City Hall Brackett Meeting Room.

May 12, 2011 at 4:00 p.m. - Deadline for RFP submittals

Submittals must be received at City Hall, located at 121 – 5th Avenue North, Edmonds, Washington 98020 by the above deadline. Submittals should be marked to the attention of Stephen Clifton, Community Services / Economic Development Director. Digital proposals may be submitted via e-mail to (Clifton@ci.edmonds.wa.us), but the City assumes no responsibility for formatting or transmission errors.

Submittals received after the deadline will not be considered.

May 12 - 19, 2011 - Consideration of submittals and selection of interview candidates

An evaluation team will select candidate(s) from submittals received for interview(s). This process will include review of submittals, references, and other information as necessary, as well as rating of submittals.

May 24 and/or 25 - Interviews with selected candidates

Interviews will provide an opportunity for the City and selected candidates to further gauge their fit and ability to work with each other.

Please ensure that the appropriate representative, *including the designated Project Manager*, will be available to attend an interview if selected as a finalist.

May 26 - 27, 2011 - Selection of preferred candidate

The City will select a preferred candidate, based on the interviews, written proposal, and other information, as well as the results of the reference checks, and will contact all candidates about the results.

May 30 - June 8, 2011 - Negotiation of contract

The City will attempt to negotiate a satisfactory contract with a preferred candidate. If the City determines, at its sole discretion, that the negotiation is not proceeding satisfactorily, the City may terminate negotiation with the preferred candidate and may begin negotiation with another candidate.

June 14 (City Council Committee) and June 21 (Full City Council) - Approval of contract by City Council

SUBMITTAL REQUIREMENTS

To be considered, interested parties must submit by the deadline five copies (at least one that is unbound and photo copy ready) of a proposal package that includes the following:

- Letter of interest – must be no more than two pages (note: one page is one side of an 8½” x 11” paper) in length and include contact information and signature.
- Summary of qualifications, experience and availability – must be no more than eight pages in length. It should summarize qualifications, relevant experience, and availability to participate in the RFP process (*including Interviews*) and provide services to the City. It should also identify key staff members who will be participating.
- Proposed approach to the process, including a proposed schedule and description of proposed public involvement methods – must be no more than five pages summarizing method and approach to providing consulting services to the City. Please review the City’s preliminary flow chart (attached to this RFP) and be sure to indicate major differences between it and the consultant’s proposed approach.
- Proposed budget – must be no more than two pages and include detailed project costs, by task and estimated hours. Actual compensation is subject to contract negotiation. A third page may be added, if additional tasks (and associated costs) that could be performed by the consultant team, in the event that the project budget was to be increased, are proposed and described.
- List of professional references – must be no more than one page listing most recent professional references and their contact information.
- A minimum of three examples of relevant written work related to Visioning and Strategic Planning: at least one of which will represent a strategic plan prepared on behalf of a City or comparable entity.

- Ability to meet the City’s insurance requirement for minimum amounts of insurance: commercial general liability insurance and professional (errors and omissions) insurance in amounts not less than \$2 million for the duration of the project.

EVALUATION CRITERIA

The following will be considered in evaluating each proposal:

- Completeness of response to the RFP requirements
- Experience with similar projects
- Creativity of approach
- Experience in effective public involvement and incorporating citizen input
- Demonstrated facilitation skills in successfully working with city councils/staff, boards and commissions, community organizations, businesses and citizens
- Demonstrated knowledge/experience with actual development of strategic plans and implementation of possible strategies
- Demonstrated experience in municipal finance
- References
- Cost

GENERAL INFORMATION

- A. The City of Edmonds, as an Equal Opportunity Employer, requires all consultants to affirm that they do not discriminate against individuals or firms because of their race, color, marital status, age, sex, national origin, handicap, creed or sexual orientation.
- B. All proposals submitted become public information and may be reviewed by anyone requesting to do so at the conclusion of the evaluation process.
- C. All proposals received by the City of Edmonds in response to this RFP shall remain valid for ninety (90) days from the date of submittal.
- D. The City reserves the right to cancel or reissue the RFP or to revise the timeline at any time. The City reserves the right to reject any and all proposals and to waive minor irregularities in the proposal process. The City may accept any proposal if such action is believed to be in the best interest of the City.
- E. The City is not liable for any cost incurred by the proposer prior to execution of a contract.
- F. This is a City project and holds liability for work with its consultants. The contract between the successful proposer and Edmonds shall include all documents mutually entered into specifically, including the contract instrument, the RFP, and the response to the RFP. The contract must include, and be consistent with, the provisions stated in the RFP.
- G. The prime consultant will be required to assume the responsibility for all services offered in the proposal whether or not directly performed by the prime consultant. Further, the prime consultant will be the sole point of contact for the City of Edmonds with regard to contractual matters.
- H. The project team shall be approved by the City of Edmonds. The City must approve any changes in the project team.

ATTACHMENT A
SCOPE OF SERVICES

The proposed scope of services must include at a minimum, the following items. The successful candidate will be able to:

Phase 1 - Visioning

- Facilitate a community visioning process. One component of the strategic planning process includes a community visioning process consisting of public meetings, focus-group sessions, open houses, and other outreach forums. These gatherings would result in the submission of a multitude of suggestions from members of the Edmonds community. The desired outcome is a community vision entailing guiding goals, each with specific visioning targets that could serve as a framework for the strategic planning process.

Phase 2 -

- Gather and analyze information to become familiar with the City of Edmonds. This includes conducting an internal and external scan, i.e., looking at or reviewing, a community's resources, strengths and assets in light of trends and influences affecting the community.
 - Internal scan would include an inventory of community resources, e.g., city resources and finances, people, health, education, business and job opportunities, housing, art and culture, leisure, recreation and entertainment, and geography.
 - External scan would look at what is happening outside of the community on a local, regional and national level that may affect a community, e.g., demographics, economy and lifestyle trends.
- Describe the overall strategy and identify key challenges and opportunities.
- Develop an Action Plan and establish implementation steps and schedule.
- Establish benchmarks or milestones that measure the City's progress throughout the Strategic Planning process.
- Develop and initiate a public involvement program that engages the community in the Strategic Planning process. Electronic surveys, community open houses, and other forms of community outreach could be used to achieve this objective. In addition, a statistically valid telephone survey must be used to solicit feedback from the community. Provide summaries and analyses of all public input.
- Coordinate the process with City staff and Strategic Planning advisory/oversight committee.
- Participate in Economic Development Commission, Planning Board and City Council briefings and presentations.
- Facilitate Council discussion and decision-making at regular or special City Council meetings.
- At a minimum, provide the following deliverables:
 - A recommended brochure detailing the Strategic Planning process for distribution to the public,
 - A recommended final Strategic Plan document that includes an implementation plan with benchmarks or milestones that measure the City's progress, and
 - A recommended Strategic Plan Executive Summary.

STRATEGIC PLAN PLANNING PROCESS

City Council Support

Budget Authorization

Solicitation of RFP, Review of Proposals and Interviews

City Council Selection of Consultant

The City is looking for consultants/contractors to provide recommended changes to the following outline or changes/ideas which would enhance or improve the overall strategic planning and visioning process:

Collect & Review (Conduct Internal and External Scans)

- Existing Info

Conduct Initial Set of Interviews / Visioning Process

- Council, City Staff, Other Stakeholders (e.g., Economic Development Commission, Planning Board, Port of Edmonds, Key Community Groups, County and possibly representatives from neighboring communities)
- Identify Key Issues and Questions

Council Regular or Special Meeting

- Intro to process and desired outcome
- Where are we now?
- What direction do we want to be headed? (general)
- Confirm key issues and questions to be answered
- SWOT Exercise or similar process (Strengths, Weaknesses, Opportunities, Threats)

Community Input on Issues, Core Values and Future Direction

- Telephone Survey
- Survey Monkey
- Community Forums (inside & outside)
- Info Booths at Local Events
- Neighborhood Events
- Other

ID of Common Themes and Draft Goals (Focused Efforts)

- Second Council Regular or Special Meeting
- Council Decision Points

Create Draft Strategic Plan

- Goals and Action Plan

Community Input on Draft Plan

- Workshop(s)
- Open House(s)
- Open House(s)/Workshop(s) Hybrid
- Statistically valid survey

Revise Draft Plan

- If Necessary

Public Hearing(s)

City Council Adoption of Strategic Plan

Execution

Implementation (Citywide and Department Plans – how will these relate to existing plans and organizations?)

Reporting and Follow-up (recommendations on how this can/will be accomplished?)