

Request for Proposal – Engagement Planning and Implementation

January 30, 2012

I. Purpose

The Northeast Ohio Sustainable Communities Regional Planning Process is a three-year planning program funded largely by a highly competitive, first of its kind, \$4.25M federal grant from the U.S. Department of Housing and Urban Development (HUD) as part of the new federal Sustainable Communities Initiative. The Sustainable Communities Initiative is an interagency collaboration between the U.S. Department of Housing and Urban Development, the U.S. Department of Transportation, and the U.S. Environmental Protection Agency. The NEOSCC has also received a matching program grant of \$500,000 from the Fund for our Economic Future. Its 31 consortium member organizations have pledged a total of over \$2.35 M of in-kind match in the form of staff time and operating expense contributions.

Coming together to create a Vibrant Northeast Ohio

The Northeast Ohio Sustainable Communities Consortium's (NEOSCC) is focused on advancing a quality, connected twelve-county region amidst the today's economic climate and stretched resources. Through a diverse group of member organizations and region-wide engagement, the NEOSCC will develop concrete plans while producing collaborative capacity for action. The aim of all of these efforts is to create a vibrant and resilient Northeast Ohio that increases our quality of life, connects our communities; welcomes diversity; restores and protects our natural resources; and creates a competitive economic framework for the vitality of our region.

Critical to the success of the initiative is our public engagement platform: Vibrant Northeast Ohio - LEARN, SHARE, CREATE AND ACT.

The NEOSCC is a non-profit organization with a Board consisting of diverse organizations throughout the region. The Program Management Office (PMO) is led by an Executive Director, Deputy Director, Project Managers, and a Manager of Communications and Engagement (MCE). Due to the small PMO staff, numerous consultants are being engaged beyond Engagement across the initiative. Based on the number of consultants being managed by the PMO staff, it will be critical for consultants to be responsive to schedules and decision milestones. The small staff also dictates that many meetings with consultants will be multi-purposed in order to make the most efficient use of staff, board, and consultant schedules. The grant from HUD extends to the end of December 2013.

A complete description of our engagement plan, please visit the neoscc.org home page.

For more information on the NEOSCC generally, please visit neoscc.org

Requirement & Background:

A significant opportunity for the selected engagement consultant(s) will be to support the development of a value proposition for sustainability and collaboration within our region. The engagement consultant(s) retained for this work will lead the team that crafts strategies and implements tools that will foster resident engagement leading to a shared vision and action.

Geographic reach:

The NEOSCC initiative’s planning footprint covers Northeast Ohio which includes over 4 million residents. The specific counties included are:

Ashtabula	Cuyahoga	Geauga
Lake	Lorain	Mahoning
Medina	Portage	Summit
Stark	Trumbull	Wayne

These counties include four metropolitan areas: Cleveland, Youngstown, Canton and Akron. Each city has a Metropolitan Planning Organization (MPO). The four MPO’s which cover the 12 counties will be serve as a central geographic organization for engagement outreach.

The NEOSCC Communications and Engagement Committee and Program Management Office will lead the NEOSCC engagement efforts. The Manager of Communications and Engagement is specifically tasked with managing any selected consultants. ***In December, a Request for Proposal was issued by the NEOSCC for communications, graphic design, web design, and media outreach. Selection of those consultants is currently under way.***

Current State:

The Consortium has begun to implement its work plan and expand its board roster of 31 member organizations. The initiative is organized into five Work Streams (Environments, Economic Development, Housing and Communities, Connections, and Quality Connected Places). The Work Stream membership features Consortium members and other subject matter experts.

Services & Outcome Expectations

The Northeast Ohio Sustainable Communities Consortium is seeking to engage experts to shape and implement a dynamic dialogue with the community. Based on the NEOSCC priorities and best practices research, the Communications and Engagement Work Stream has produced a plan for communications and engagement. The NEOSCC is looking to retain a consultant to move the engagement plan into action.

1. Plan Refinement/Tactical Plan Development

The Vibrant Northeast Ohio engagement plan outlines engagement goals, audiences, principles and a menu of tactics. It is expected that the selected consultant, in collaboration with NEOSCC will transform this existing framework into a tactical implementation plan. The tactics which are described in the plan include small and large scale meetings, a small grants program, polling, on-line discussions, etc. Consultants can also propose other tactics that have not been identified in the menu (if doing so, please include a scope of work and required fees).

Working with the NEOSCC, the consultant will further define the audiences and goals of the plan and finalize the mix of these approaches for implementation. It is anticipated that the tactical engagement plan will be revisited and, as necessary, revised throughout the planning period to ensure effectiveness.

CONSULTANTS SHOULD REVIEW THE ENGAGEMENT PLAN IN PREPARATION FOR RESPONSES. The plan is available on the neoscc.org home page.

2. Implementation

Based on the NEOSCC staff size, it is necessary to have a “turn-key” relationship with the Engagement Consultant. We are looking for a partner who can collaborate with the NEOSCC on the tactical plan. The consultant will manage and implement the engagement strategy. Since the final decision on tactics will be completed in collaboration with the consultant, respondents should propose implementation services in a menu format. It is critical that consultants’ responses illustrate their capability to manage large complex engagement initiatives.

Required Scope

Component One: Engagement Plan Refinement/Creation of Tactical Plan

It is anticipated the selected consultant will be contracted in late March or April. Due to schedule constraints, it is critical that all aspects of Component One are completed by the middle of May.

A. Plan Refinement

The following outlines the deliverables of the Vibrant Northeast Ohio engagement plan refinement:

1. Assessing and Analyzing Goals

In striving to create a shared vision for the NEOSCC planning efforts, the following goals have been set for public engagement activities:

- Create an understanding of regional and local issues and opportunities;
- Engage the public in a dialogue that develops common ground for collaboration and action;
- Develop dynamic and on-going relationships, both existing and new;
- Implement and model an engagement platform that is both vibrant and enduring;
- Reach as many individuals and organizations throughout the 12 counties to engage and act, paying particular attention to the following groups:
 - those typically underserved or unrepresented in the planning process- working with the marginalized while accommodating limited English speakers, persons with disabilities and the aging
 - those who historically have not found value in previous planning activities
 - those who dismiss this effort for other reasons.

The selected consultant will work with the Communications and Engagement Committee and Project Management Office to confirm the goals and establish metrics to assess progress.

2. Identifying Appropriate Audiences and Initiating Engagement

The selected engagement consultant(s) will work with the Communications and Engagement Committee and communications consultant(s) to more definitively define audiences to engage and the networks that are need to reach these groups.

General Public

- Public Rural
- Public Urban
- Public Suburban
- Other Demographics
- Public Disadvantaged/Unengaged
- Key Coordinating/Networking Organizations
- Young Professionals
- College Students
- High School Students

In order to further the development of an enduring engagement platform, the consultant will document the networks and tools identified during the engagement process for publishing at the end of the project.

B. Tactical Plan Development

Based on the completion of the plan refinement, the Consultant in collaboration with the Communications and Engagement Work Stream and the Project Management Office will develop a tactical plan. The plan will cover the remainder of the grant period which runs through December 2013. The following are the scheduled phases and milestones:

Existing Conditions and Trends Analysis	Current – May 2012
Framing the Vision	May 2012 – December 2012
Regional Issues Goals and Policies	December 2012 – June 2013
Framing the Regional Plan	June 2013 – November 2013

Within the above phases, the tactics selected will need to provide a two-way dialogue (learning and sharing) and collaboration (creating and acting) with the public. A critical component of the tactics will be outreach to the disadvantaged, those who are traditionally unrepresented while accommodating limited English speakers, persons with disabilities and the elderly.

The NEOSCC has recently conducted a separate proposal request for communications strategy and website development. It is anticipated that there will be a high level of coordination and collaboration between these consultants and the selected engagement professionals. We encourage submitting firms to also identify potential tools that may be incorporated into the framework of the NEOSCC website.

Menu of Tactics

In reviewing best practices, the NEOSCC is excited about the opportunity to introduce new engagement tools to the region. These tools will be accompanied by more traditional methods that are perhaps reinvigorated. The organization understands that not all of these tactics may be utilized. An evaluation of tactics will include an analysis of previous effectiveness, relevance, cost and contribution to an enduring platform.

- Travelling Engagement - Smaller Pop-up Dialogues, traditional small group meetings
- Metro Convening (in each of the four metro areas)
- Regional Convening
- Metro Area Workshops with government and agency officials
- Booths/Exhibits at other public events (i.e. Earth Day, Summer Festivals)
- Joint programs with other initiatives
- On-line engagement discussions boards
- Social Media
- Text message campaigns
- Small Granting Programs

- Development of Vibrant Region Dashboard
- Connections to Arts/Performance/Sporting Events
- Business and Public advisory board strategies
- Volunteer program and coordination
- Other tactics to be identified

On-line interactive tools (polling, mapping and gaming) will also play a critical role in the engagement plan. It is anticipated that more detailed scopes and fees will be requested for these types of tools after the completion of the tactical plan. We would like to understand if respondents have experience in managing both face-to-face and on-line tools. Please also indicate if the technology tools development and implementation are an internal expertise or if this will be a secondary service to contract out.

Based on the selected tactics and in alignment with the overall schedule and budget of the initiative, the consultant will develop a tactical plan outlining management and implementation. The tactical plan will include at minimum:

- Overall schedule
- Overall Budget
- Tactical plan re-evaluation schedule

Specific details on tactics including:

- Tactic description
- Objectives to be achieved
- Preliminary timeline (launch, attraction, event, reporting and measurement) and how this ties into overall initiative schedule
- Means to capture dialogue and steps for collaboration (future follow-up)
- Identification of assigned consultant resources, NEOSCC responsibility
- Approach to network and audience attraction
- Audience matrix tying methods, timing and Objectives to specific audiences
- Facility and equipment needs
- Materials needs
- Refreshment needs
- Other coordination needs
- Estimated budget
- Measurement

Component Two: Management and Implementation

A. Management

During the course of the project, the selected consultant will be the lead coordinator for the public engagement efforts. This will include overall resource, tactics, schedule, and budget management. Beyond the management of the public campaign, this will include monthly reports indicating status, measurement and budget, and invoicing as well as participation in staff and board meetings as required. The following are also considered baseline deliverables of engagement management:

- Development and facilitation of agreements and working relationships with organizations to engage the region and assess effectiveness;
- Identification and gathering of audiences via the necessary network outreach;
- Creation and administration of Engagement Training program – in which consultant will train NEOSCC staff, Consortium members and others to become public engagement leaders;
- Development of methodology for gathering and reporting on attitudinal and demographic data collection;
- Documentation of engagement meetings and summarization of feedback; and
- Performance of quarterly tactic evaluation.

B. Implementation

As stated earlier, the NEOSCC is seeking a “turn-key” relationship with the engagement consultant. This will entail the successful delivery of the approved tactical engagement plan (including the final selections from the menu in the plan development component). Including the following services and others as necessary:

- Manage and implement strategy timelines and budget for each individual tactic;
- Design and creation of engagement events;
- Collaboration with NEOSCC on the development of questions and discussion topics;
- Collaboration with communications consultant on the marketing of face-to-face and on-line engagement;

- Identification, cost estimating and coordination of additional on-line engagement tools purchase;
- Management and moderation of on-line engagement tools (interactive graphics and dialogues) and management/capture of data/dialogues for use in initiative planning and reporting;
- Identification, coordination/contract with community-based organizations to host meetings;
- Identification, reservations and coordination with any facilities (i.e. for large scale meetings);
- Development of facilitator handbooks;
- Development of participant handouts; and
- Provision of dialogue facilitation services for small and large scale meetings.

III. Proposal content - Please limit your response to 25 pages.

1. Who are you?

- a. Describe what makes your organization unique. Please describe your creative approach. How would you characterize its strengths?
- b. What is your experience with non-profit and civic initiatives within and outside Northeast Ohio? What engagement tools have you used to do so?
- c. Please describe your experience managing large complex engagement initiatives.
- d. Please describe your experience in the following areas:
 - Non-profit and civic arena
 - Regional experience
 - Engagement Planning
 - Engagement Management
 - Engagement Implementation
 - Large Scale meeting facilitation
 - On-Line Engagement Tools
 - Sustainability
- e. Please describe the work you are most proud of, including results achieved relative to objective.

- f. What is your current workload? Please describe your ability to begin the project in late March.
- g. Include three references for your previous work.

2. How will you manage our account?

- a. Understanding that we are a non-profit organization and require cost-effective pricing, how will you manage our account as efficiently as possible without compromising quality or integrity?
- b. Please indicate your in-house capabilities for the following:

	In-House – Yes or No
Travelling Engagement - Smaller Pop-up Dialogues, traditional small group meetings	
Metro Convening (in each of the four metro areas)	
Regional Convening	
Metro Area Workshops with government and agency officials	
Booths/Exhibits at other public events (i.e. Earth Day, Summer Festivals)	
Joint programs with other initiatives	
On-line engagement discussions boards	
Social Media	
Text message campaigns	
Small Granting Programs	
Development of Vibrant Region Dashboard	
Connections to Arts/Performance/Sporting Events	
Business and Public advisory board strategies	
Volunteer program and coordination	
Management of on-line interactive tools (mapping, gaming, polling)	
Development and implementation of on-line interactive tools (mapping, gaming, polling)	
Other tactics to be identified	

- c. Identify individuals assigned to project, their specific roles and credentials.
 - d. Please describe any Outside Consultants assigned to specific tasks (include their experience and background and a Letter of Commitment from Outside Consultants to your Organization’s Proposal).
 - e. If you have developed a multi-firm team for your response, please outline your previous experience working as a multi-firm team.
 - f. Please describe the function of your account management. How does it interact with a typical client? How does your firm approach projects with multiple other consultants?
 - g. How will we measure your success?
3. Please describe your approach.
- a. Outline the scope of services required to meet the proposed deliverables.
 - i. Please be **specific** in the number of plan drafts and revisions that your scope and fee include.
 - b. Identify proposed timeline and budget.
 - c. Project Organizational Chart

4. Fees

Please provide an estimate of expected cost, consultant hours, timeframe and personnel for each of the appropriate components. PLEASE BE SPECIFIC IN IDENTIFYING ANY QUALIFICATIONS SUCH AS NUMBER OF DRAFTS/REVISIONS THAT ARE INCLUDED IN YOUR FEES.

Provide sufficient insight into the costs proposed so that the scope or “unit” of work covered is clear. Please provide an estimate inclusive of costs expected for labor, regional travel, and materials (all fees should be inclusive of any materials, software, etc.).

Include your standard hourly rate schedule as well. Also, please be sure to identify your team members that will be assigned to each task.

Component One: Engagement Plan Refinement/Tactical Plan Development

	Time and Material Not to Exceed Fee	Hours	Schedule	Personnel
Engagement Plan Refinement				
Tactical Plan Development				

Component Two: Engagement Management and Implementation

	Time and Material Not to Exceed Fee	Estimated Hours	Schedule	Personnel
<p>Overall Account Management Including reports, on-going internal meeting participation.</p> <p>Development and facilitation of agreements and working relationships with organizations to engage the region and assess effectiveness;</p> <p>Identification and gathering of audiences via the necessary network outreach;</p> <p>Creation and administration of Engagement Training program – in which consultant will train NEOSCC staff, Consortium members and others to become public engagement leaders;</p> <p>Development of methodology for gathering and reporting on attitudinal and demographic data collection;</p> <p>Documentation of engagement meetings and summarization of feedback; and</p> <p>Performance of quarterly tactic evaluation.</p>				

MENU OF POTENTIAL TACTICS				
<p>Please be certain to include potential costs for all relevant services to deliver these tactics. NEOSCC understands that the mix of these tactics and their scope will be determined during the tactical plan development. NEOSCC reserves the right to further breakdown the award to distinct services described.</p>				
Travelling Engagement - Smaller Pop-up Dialogues, traditional small group meetings (per meeting)				
Metro Convening (four metro areas) (per mtg.)				
Regional Convening (per mtg.)				
Metro Area Workshops with government and agency officials (per mtg.)				
Booths/Exhibits at other public events (i.e. Earthday, Summer Festivals) (per mtg.)				
Joint programs with other initiatives (per mtg.)				
On-line engagement discussion management				
Social Media				
Text message campaigns				
Small Granting Programs				
Development of Vibrant Region Dashboard				
Connections to Arts/ Performance/Sporting Events				
Business and Public advisory board strategies				
Volunteer program and coordination				
Other tactics				

Please list any other areas of cost not outlined above.

IV. Process

Proposals should be sent in electronic format ONLY (NO PAPER COPIES PLEASE) to ebarcelona@neoscc.org. To be considered for the RFP please submit by 5:00 PM, Friday, February 24, 2012. Upon review, we may select firms to present their proposal during the week of March 12, 2012.

OTHER INFORMATION

Period of Performance: April 2012 through December 2013

NEOSCC seeks consultant services as defined for specific scopes outlined herein as well as qualifications for services as needed throughout the planning process. All firms' information will be kept on file for consideration as other opportunities arise.

Submittal Expectations

PLEASE NOTE THAT THIS IS NOT A DESIGN SUBMITTAL. WE ARE LOOKING TO UNDERSTAND CONSULTANT'S APPROACH, EXPERTISE AND COSTS AND WILL NOT BE ACCEPTING PROPOSED SOLUTIONS AS PART OF THE SELECTION PROCESS.

Rejection of proposals

NEOSCC reserves the right to reject any and all proposals received in response to this Request for Proposal and to negotiate separately with any other sources regarding components of the proposal.

Preparation costs

All preparation and/or presentation costs incurred in responding to the Request for Proposal are the sole responsibility of the respondent and will not be reimbursed by NEOSCC.

NEOSCC Commitment

The release of this request does not imply any commitment on the part of NEOSCC to accept any proposals submitted. NEOSCC also reserves the right to further breakdown the award to distinct services described.

Correspondence

All correspondence or inquiries related to this proposal request must be addressed to:

Emma Petrie Barcelona

Deputy Director

330-375-2949

ebarcelona@neoscc.org

AT THIS TIME, PLEASE UTILIZE EMAILS FOR QUESTIONS! ALL QUESTIONS ARE DUE BY February 15, 2012. NEOSCC will release responses to questions on February 17 on the NEOSCC.org website.

Evaluation areas for proposal review:

- Understanding the Scope/RFP priorities
- Responsive to RFP- specific inquiries
- Level of creativity and innovation
- Experience managing large complex engagement initiatives
- Relevant experience/skill sets
 - Demonstrated experience in non-profit and civic arena
 - Demonstrated experience in regional experience
 - Demonstrated experience in engagement planning
 - Demonstrated experience in Engagement Implementation
 - Demonstrated experience in Large Scale meeting facilitation
 - Demonstrated experience in On-Line Engagement Tools
 - Demonstrated experience in Sustainability
- Capacity of team to deliver work required
- Management Approach
- Approach to Data Capture and Reporting
- Approach to measurement of success
- Clarity and thoroughness of approach, scope of services and timeline
- Style/fit to NEOSCC stakeholders
- Fee for value offered
- Other intangibles

Business elements under review:

- Women Owned Business Enterprise
- Minority Owned Business Enterprise
- Section- 3 Business Interest