



STRATEGIC PLANNING CONSULTANT DOWNTOWN BILLINGS ALLIANCE



Proposals must be received by email (no fax or mail submissions will be accepted)

By 5 PM MST on November 1, 2016

to be submitted to:

Greg A. Krueger

Development Director – gregk@downtownbillings.com

This RFP is also available at our website: www.downtownbillings.com

PROPOSAL COVER STATEMENT

**REQUEST FOR PROPOSALS FOR STRATEGIC PLANNING CONSULTANT
FOR Downtown Billings Alliance**

Applicant Organization Name: _____

Contract person and Title: _____

Primary Contact Phone: _____

Primary Contact Email: _____

Business Address: _____

Year Founded: _____

Federal Employer Number: _____

Authorized representative

Name: _____ Date: _____

Signature: X _____

This signed form must serve as the first page for the
proposal package.

A. Summary

The Downtown Billings Alliance (Alliance) is seeking consultant services to develop a 3 to 5 year strategic plan that would build upon the 1997 Framework for Downtown Billings Plan (www.downtownbillings.com) and help us determine our organization's primary value proposition, strategic opportunities, goals and objectives to maximize its impact, implementation strategies and activities, and human resource, administrative, and infrastructure plan to support this work. The expected timeline is 6-9 months, with an anticipated start date no later than November 1st, 2016.

B. About The Downtown Billings Alliance

The Downtown Billings Alliance is comprised of three separate non-profits. The Downtown Billings Association (DBA), the merchant/membership organization, was created in 1985. The Downtown Billings Partnership (DBP), the economic development and redevelopment arm of the Alliance, was created in 1998, to implement the Framework Plan, the downtown master plan. The DBP assists the City of Billings with Tax Increment Financing investment in largely the central business district. The DBA promotes and advocates for a vital city center through programmatic and place-making elements like event management, public art, greenspace development, etc. The Business Improvement District (BID), the property-owner organization, was created in 2005 and renewed for 10 years in 2015; the BID manages clean, safe, and outreach programs.

Since the implementation of the Framework Plan, downtown Billings has invested well over \$20 million public dollars to leverage well over \$200 million private dollars to revitalize and grow our city center, downtown Billings.

C. Scope of Work

The Alliance seeks a Strategic Planning Consultant (Consultant) to lead the three boards and staff through the process of developing a three to five year strategic plan. The plan will review and potentially revise the Alliance vision/ mission and include the goals, objectives and actions steps that will guide the organization and position downtown Billings to be regionally sound and competitive.

This scope of work is anticipated to span approximately 6-9 months, on a specific schedule to be determined jointly. The Consultant will need to be available for on-site meetings and related activities at our offices in downtown Billings.

In partnership with a Strategic Planning Committee, the Consultant will be responsible for designing and managing a comprehensive strategic planning process that must involve the three boards of the Alliance, the Executive Director, the Development Director, staff, property owners, tenant merchant members, Downtown NOW!, and Billings NOW!

D. Deliverables and Specific Issues to be Addressed

We anticipate that the final strategic plan may include, but not be limited to, the following elements:

1. Purpose:
 - a. Organization's Mission and Value Proposition
 - b. Strategic areas of focus and service priorities, to include:
 - i. Downtown Identity
 - ii. Existing Conditions Analysis
 - iii. Business Retention, Attraction
 - iv. Downtown Housing
 - v. Redevelopment Goals

2. Implementation Strategy

- a. Goals and objectives to achieve priorities
- b. Activities and programs (both current and new) to support goals
- c. Partnerships
- d. Implementation plan detailing primary goals, milestones, outcomes and strategies for each year.
- e. First year work plan

3. Personnel

- a. Staffing strategy and primary staff competencies
- b. Succession planning
- c. Board and committee strategy, including proposed committee size and composition

4. Operations

- a. Infrastructure systems and policies necessary to achieve plan

5. Sustainability

- a. Budget
- b. Resource assessment
- c. Revenue mix and fundraising strategy

E. Proposal Formatting

1. Proposals should be prepared in a straightforward manner to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
2. Proposal must be written in 12-point Times New Roman, double-spaced, black and white, and one-inch margins on all sides.
3. A Proposal Cover Statement with original signatures, in blue ink, of the bidder's authorized Principal, must precede the narrative in the original proposal packet.
4. Include a table of contents identifying all primary elements of the proposal packet, and also reflecting the numbering and headers of the narrative section.
5. Narrative section is not to exceed 12 pages in length.
6. Attachments (budget, work plan, and references) are not included in this page count.
7. Please do not include extraneous materials, which will not be considered.

F. Proposal Review and Ratings

A Review Panel will review all proposals; the panel will include the Executive Director, Development Director, members of the Alliance Boards, and members taken at large from the downtown community.

Proposals will be evaluated a simple point scoring system related to the deliverables. However, the Committee may consider any factors it deems necessary and proper, including but not limited to price, quality of service, response to this request, experience, staffing, and general reputation. The final award decision rests with the Alliance. Proposers may be asked to make formal presentations to Alliance during in-person interviews held mid-November, 2016.

G. Timetable & Submission Process

1. **Submission Address (email submissions only):** Greg A. Krueger, Development Director
gregk@downtownbillings.com
2. **Interviews:**
 - a. The Alliance may request representatives of a bidding organization to appear for interviewing purposes
 - b. Travel expenses and cost related to the interview will be the responsibility of the bidder.
3. **Intent to Solicit and Award:**
 - a. The policy of the Alliance is to solicit proposals with an honest intention to award a contract.
 - b. This policy will not affect the right of the Alliance to reject any or all proposals.

Please construct your proposal packet to provide the requested information in the following order, using the numbering and headers, and addressing the content specified here:

A. Proposal Narrative (12-page maximum)

1. Executive Summary (Mandatory but not scored)
2. Agency Overview (5% of score)
 - Mission and its overall service philosophy
 - Core areas of practice
 - Statement of experience and qualifications, including experience with:
 - Downtown organizations
 - Organizations with community-focused budgets between \$400K and \$750K
 - Providing organizational development services
 - Providing strategic planning services
 - Board assessment and development
 - Years in operation and years providing services such as the scope of services proposed herein
 - Location of administrative office
 - Reasons why you feel that your organization is well suited to serve as strategic planners for the Downtown Alliance
3. Proposed Approach to the Project (20% of score)
 - Please describe your approach to this project, including the theoretical foundation for the proposed approach and an explanation for why this approach is best suited to accomplish the proposed work and is appropriate to Alliance needs, limits, and goals as an organization.

4. Description of Project Process, Phases and Milestones (30% of score)

- Please provide a comprehensive and detailed description of the proposed project's process, phases, and milestones, which may include primary goals and strategies; purpose/intent of the phases; activities, duration, and sequence of all elements of the project; and roles/responsibilities for both Consultant team and Alliance stakeholders.

5. Description of Specific Project Deliverables and Outcomes (15% of score)

- Please describe and detail the proposed project deliverables as well as the anticipated outcomes of the project.

6. Staffing Plan and Scope of Involvement (5% of score)

- Identify the primary consultant who will be responsible for managing the project and for ensuring production of high-quality deliverables for all elements of the project, on time and on budget. List his/her billing rate, anticipated total hours on the project, and include a full resume or professional biography for the primary consultant.
- Identify each other person who will work on the project; describe his/her role; list his/her billing rate; identify his/her anticipated total hours on the project; and include his/her short professional biography (no more than one-page biography per staff person).
- If the proposed services will be provided in partnership with another firm, clearly articulate the roles and responsibilities, subcontract amount, hours, and deliverables; be sure that this description is explained in and consistent with the work plan, description of project phases and milestones, budget/budget narrative, and references.

B. Work plan (3 page maximum) (15% of score)

1. Provide a project work plan/timeline in the form of a chart, showing key activities, responsible parties and key stakeholders involved, and dates.
2. Ensure that the chart reflects and is consistent with the proposal narrative, phases, goals, milestones, and activities.

C. Budget and Budget Narrative (3 page maximum, in spreadsheet form) (10% of score)

1. Please provide a budget and budget narrative that details all project costs.
2. Budget should enumerate the expected hours, hourly rate, and total cost for each person involved in the project, along with all other elements included within the total cost.
3. Identify any necessary, expected, or predictable project costs not included in this proposal.

D. Similar Projects and References (2 page maximum) (Mandatory but not scored)

1. Provide brief summaries of three similar projects completed within past five years; list cost and project duration; include name of contact person and provide contact information for each reference.

Scoring Rubric (provided for informational purposes only)

A. Proposal Narrative (12 page maximum)	Points
1. Executive Summary (mandatory but not scored)	NA
2. Agency Overview	5
3. Proposed Approach to the Project	20
4. Description of Project Process, Phases and Milestones	30
5. Description of Specific Project Deliverables and Outcomes	15
6. Staffing Plan and Scope of Involvement	5
B. Workplan (3 page maximum)	15
C. Budget and Budget Narrative (3 page max, in spreadsheet form)	10
D. Similar Projects and References (2 page max) (mandatory but not scored)	NA
TOTAL	100