



REQUEST FOR PROPOSALS FOR OPERATIONAL PLANNING CONSULTANT RESPONSES DUE BY NOON, NOVEMBER 25, 2020

About the NCEDA Foundation

In 2020, the **North Carolina Economic Development Association (NCEDA)** established the **NCEDA Foundation** to advance the economic development profession, to enhance the knowledge and skills of economic developers, and to strengthen the broad statewide economic development community in North Carolina through funding professional development activities, research, and education programs, especially to underserved, distressed, and rural communities and economic development organizations across North Carolina.

The **NCEDA Foundation** will 1) provide financial support for important activities not currently funded by NCEDA and 2) access new and expanded sources of funding from organizations interested in supporting economic developers and the economic development profession with charitable contributions, to create a better-informed, tightly connected, highly skilled, more inclusive, statewide economic development professional community in North Carolina.

The NCEDA Board President appointed the **NCEDA Foundation Founders Committee** to establish the 501c3 organization, which includes the NCEDA Professional Development Committee Chair, the NCEDA Research Committee Chair, and members of the NCEDA Executive Committee. **NCEDA** is a statewide association of economic development practitioners and allies focused on strengthening the economic development community across North Carolina.

Request for Proposals

The **NCEDA Foundation Founders Committee** is seeking proposals from qualified consultants to guide the development of the organization's operational plan, including programs, policies, and processes. The plan should provide the Founders Committee and staff the tools, structures, and guiding documents to commence operation of the NCEDA Foundation successfully.

Scope of Work

While the **NCEDA Foundation Founders Committee** seeks the consultant's recommendations for an effective process to create an operational plan, the Committee expects the planning process to include at least the following elements:

- Interviews and work session with NCEDA Foundation Founders Committee and NCEDA staff to shape the planning process.
- As appropriate, one-on-one interviews with key external partners and potential grantors.
- Electronic survey of potential program applicants and grantees.
- Research to identify best practices of similar foundations.
- Work session with NCEDA Foundation Founders Committee and NCEDA staff to discuss initial findings and potential components of the operational plan.
- Preparation of an operational plan document, including writing, editing, and layout of the document, with additional opportunities to incorporate suggestions of Founders Committee and NCEDA staff. The document should include at least the following components:
 - Program descriptions, frameworks, and grantee examples.
 - Policies and procedures of the programs, board governance, and operations.
 - Communication plan for the Foundation to NCEDA members and to potential grantors, including content/message development.
 - Fundraising strategy and timeline, with input from professional fundraisers.
 - Administrative management plan, including but not limited to the following:
 - Establishing and maintaining financial systems, bank accounts, and recordkeeping.
 - Processing contributions and other revenue.
 - Remitting payments for programmatic and administrative expenses.
 - Managing scholarship programs and other programmatic activities.
 - Managing marketing activities for the organization and for programs.
 - Managing events.
 - Administering the activities and meetings of the board.
- Additional or alternative components of the planning process recommended by the consultant and agreed to by NCEDA Foundation Founders Committee and NCEDA staff.

Qualifications

The **NCEDA Foundation Founders Committee** seeks a consultant with demonstrated experience successfully developing initial operating plans for not-for-profit, governmental, and/or philanthropic organizations and familiarity with the specific needs of economic development organizations. The consultant will ideally have experience working with organizations that serve rural and economically distressed communities.

The consultant will also possess the following qualifications:

- Experience and knowledge regarding organizational startup, board governance, scholarship and educational program development, fundraising strategy/tactics, and marketing/communications.
- Strong facilitation skills and ability to solicit input from individuals from various backgrounds.

Proposal

Proposals must include the following:

- 1) Workplan: Provide a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including the following:
 - a. Specific activities to be conducted.
 - b. Timeline of activities at each stage.
 - c. Milestones and deliverables tied to those activities.
- 2) Consultant qualifications and roles: Describe the consultant's qualifications to conduct the RFP scope of work activities, including expertise, knowledge, and experience conducting similar or related work.
- 3) Previous work product: Include at least two examples of written work similar to the operational plan requested by this RFP.
- 4) References: Include three references of individuals or organizations who can address comparable operational planning done by the consultant.
- 5) Personnel: Provide information about the key personnel, whether employees of the consultant or contractors, who the consultant expects to be directly involved in the operational planning process and descriptions of their roles and qualifications. If a group of consultants will conduct the planning process, indicate which consultant will have primary responsibility for implementation of the work and activities of each consultant.
- 6) Budget/cost proposal: Include a detailed budget for the entire project and each major component of the project.

Timeline

October 28, 2020	RFP issued
November 25, 2020	Deadline for submission
December 3, 2020	Finalists Selected
December 15, 2020	Interviews with finalists via Zoom
December 18, 2020	Selection of consultant complete
January 4, 2021	Contract start date
April 5, 2021	Operational plan complete

Proposal Evaluation

NCEDA Foundation will select the proposal that will provide the highest quality deliverables at the best value, through a competitive process that includes several factors, such as the following:

- Qualifications of the consultant.
- Demonstrated understanding of the objectives of this operational plan development process.
- Workplan that details project activities, milestones, and deliverables.
- Background and experience in operational planning for similar organizations/foundations, including developing relevant grant/scholarship programs.

- Quality of writing and prior operational plans provided as samples.
- Demonstrated ability to use technology to solicit input from stakeholders and to create the associated planning documents and other deliverables.
- Cost effectiveness of the proposal.

Proposal Submission

Complete proposals are due by NOON Eastern time on Wednesday, November 25, 2020. It is the responsibility of the respondent to ensure NCEDA Foundation received the submission.

Proposals must be submitted by email in .pdf format to Liz Dobbins-Smith at liz@nceda.org. Submission by mail, fax, or any method other than email to the address above will not be accepted.

Inquiries

Inquiries concerning this RFP may be directed to Liz Dobbins-Smith at liz@nceda.org.

Additional Information

- 1) All costs incurred in responding to this RFP are the responsibility of the respondent and will not be reimbursed by NCEDA or the NCEDA Foundation.
- 2) NCEDA Foundation will negotiate a written contract with the candidate selected to complete this operational planning project.
- 3) Examples of potential **NCEDA Foundation** programs:
 - Scholarships for professional development—e.g., to young executives for the Basic Economic Development course,
 - Rural economic development programs and initiatives (partner with other orgs.),
 - Assistance to economic developers in rural/underserved areas of the state to participate in economic-development-focused events, training, and other activities,
 - Initiatives to support urban revitalization and redevelopment,
 - NCEDA Research Committee activities, such as
 - Data-gathering, data-analyzing, and research tools,
 - University-based research interns,
 - Education partnerships to conduct research,
 - Consultant project funding,
 - Travel expenses to present findings,
 - Expenses related to publishing findings,
 - Large-scale, statewide projects to enhance the economic development profession and/or economic development community in North Carolina (US EDA),
 - Other meritable activities.