San Pablo Economic Development Corporation
Request for Proposal for Strategic Planning Consulting Services

November 18, 2021
Statement of Purpose

The San Pablo Economic Development Corporation (San Pablo EDC or SPEDC), located in San Pablo, CA, is seeking proposals from qualified San Francisco Bay Area consulting firms (Firm) to assist the San Pablo EDC Board of Directors and senior staff with their strategic planning process. Firms interested in partnering with the SPEDC to develop a strategic plan should submit proposals in accordance with the terms, conditions, and specifications detailed in this Request for Proposal (RFP).

Selection of the Firm is expected in late January 2022 and conclusion of the assignment by April 2022.

Firm Eligibility

To submit a proposal, a Firm must meet the following criteria:

- Experience facilitating boards and board committees through planning processes is required; master facilitator skills and innovative approaches are preferred.
- The Firm must demonstrate the successful completion of similar strategic planning processes at organizations comparable in size and complexity to the San Pablo EDC; experience working with nonprofit or local agencies in Contra Costa County is advantageous.
- The Firm must understand the current landscape for economic development in West Contra Costa County and the challenges it faces.
- The Firm’s staff consultant who intends to lead the process must be available for interviews with the Selection Team in January 2022 in San Pablo, CA.
- The Firm must demonstrate availability to begin in January/February 2022 and conclude the process, contingent on stakeholder availability no later than the end of April 2022.

Background Information

The San Pablo EDC is a 501(c)(3) founded by the City of San Pablo in 2011. Our mission is to develop, diversify and stabilize the local economy through the education and training of workforce and business. Our vision is to create an environment which enables the economic success of our businesses and residents. Ultimately, the San Pablo EDC seeks to create economic opportunity for all, which impacts health equity for a high minority, lower income community.

Our Board of Directors is comprised of five members. The five members include two directors who are also members of the City Council or appointed by City Council, and three at-large board members. The Board has a strong relationship with senior staff based on solid communication and trust.

A strong understanding of the multi-faceted EDC is critical in undertaking this strategic planning commitment. Equity is at the center of program development and regional strategic participation. San Pablo EDC serves on the Workforce Development Board of Contra Costa, its Business and Economic Development Committee, the Contra Costa Equitable Economic Recovery Task Force, and the East Bay Economic Development Alliance’s East Bay Forward Strategic Advisory Committee. While San Pablo is the base and core focus, the agency has a broader role within the region. San Pablo EDC serves workforce in
Alameda, Contra Costa, San Francisco and Solano Counties, and businesses in Alameda and Contra Costa Counties. It handles multiple grant contracts, has a professional services agreement with the City of San Pablo and generates some of its own revenue.

In terms of asset management, there are three areas in which the San Pablo EDC plays a role. For new markets tax credits (NMTC), San Pablo EDC has met compliance and unwound its first project, San Pablo Community Center, and will unwind its second, Rumrill Sports Park, in February 2022. San Pablo EDC also has its own Nano Revolving Loan Fund (Nano RLF) and manages the San Pablo Back-to-Business (B2B) Fund from underwriting to compliance. Finally, San Pablo EDC owns and manages a commercial property in San Pablo with five tenants.

Scope of Work

The selected Firm will work collaboratively with, and report to, the Executive Director. The Firm will, at a minimum, provide the following services and deliverables:

- Develop strategic planning process timeline in collaboration with the Board and senior staff
- Facilitate the full process according to the timeline, milestones of which should include development and facilitation of a/an:
  - Series of workshops to prepare the Board as well as advance the process
  - Clear, impactful mission statement
  - Vision statement that clearly and compellingly describes the future state created by the organization fulfilling its mission
  - Statement of values essential to fulfilling our mission with supporting behaviors, so that these values serve as guidelines for all that we do
  - Stakeholder analysis, including conducting interviews with representatives from each group to determine how the San Pablo EDC might best meet their needs
  - Environmental scan
  - SWOT analysis
  - Budget projection
  - Goals, Objectives and Strategies
  - Timeline, accountabilities and estimated financial costs of implementing each strategy
  - Comprehensive strategic plan
- Collaboratively develop a set of guiding principles around which a more detailed workplan might be developed in order to operationalize the strategic plan

Management is open to a customized scope of work proposal provided it accomplishes and/or incorporates the value of the above scope.
Proposal Due Date & Schedule

Proposals are due by January 3rd at 5:00 PM. The selected Firm should be prepared to respect the following timeline, which is preliminary and subject to change.

- **Week of January 3rd**: Review proposals and schedule Firm interviews
- **Week of January 18th**: Interview Firms
- **Week of January 25th**: Sign contract and initiate strategic planning process with the Firm
- **Week of April 19th or 26th**: Finalize and Approve the Strategic Plan

Format and Contents of the Proposal

Expressions of interest from qualified firms and individuals are welcomed and must include a letter of introduction and the Firm’s proposal of services.

The letter of introduction should include:

- The RFP subject, name of the Firm, contact person and all direct contact information, description of qualifications, and disclosure of any potential conflicts of interest.

The proposal should include:

- A statement of the Firm’s understanding of the services required by the RFP and how the Firm would provide these services to the San Pablo EDC. This statement should include examples of innovative approaches to strategic planning projects at similar organizations.

- A statement regarding the current landscape for economic development in West Contra Costa County and the challenges the San Pablo EDC can expect in the next 5 years.

- A description of comparable services similar in scope to San Pablo EDC’s performed by the Firm during the most recent five-year period, as well as any experience with similar organizations. For those comparable services performed by the Firm, include a minimum of two references per engagement with all appropriate contact information.

- The Firm’s guarantee of delivery of services as defined in the Scope of Work in accordance with the outlined schedule as provided in the RFP.

- A work plan that contains methodology, timeline, and deliverables for the project.

- Biographies of the team who would participate in the engagement.

- Suggestion of any other services or alternative approaches the Firm feels may be in the San Pablo EDC’s best interest to accomplish a timely, successful strategic planning process.

- References, including contact information, for at least three organizations for which the Firm has provided strategic planning services.
• The Firm’s retainer fee, if any, along with a proposed schedule of payments for services requested in the Scope of Work and all applicable expenditures. If the Firm requires a retainer fee, it shall provide a retainer fee for all items in this RFP which will remain valid through the stipulated performance period or until delivery of services is complete. The fee shall include the items as specified.

• The firm’s disclosure of COVID-19 vaccination status and policy, as well as COVID-19 safety protocols when working with clients in person.

• Disclosure of any potential conflict of interest by the Firm’s partners or senior managers in relationship to the San Pablo EDC.

As San Pablo EDC embraces green policies and sustainability initiatives, proposals must be received by Leslay Choy, Executive Director, San Pablo EDC by or on Monday, January 3, 2022 by 5:00 PM as follows:

• Electronic PDF file. Proposals become the property of San Pablo EDC as of the closing date and will not be returned to the Firm unless requested in writing at the time of submitting proposals.

**Contractual Terms and Conditions**

The Selection Team seeks to name the Firm in January 2022. The Selection Team intends to select the most responsive and responsible Firm whose proposal is deemed most advantageous to San Pablo EDC, and whose approach, values, and experience are found to be the best fit to San Pablo EDC. San Pablo EDC reserves the right to waive any defect or omission in any proposal which does not materially affect the terms of the response to this RFP. San Pablo EDC also reserves the right to reject any proposals received. The Selection Team will notify all Firms whose proposals were not accepted no later than January 25th.

Negotiation of all financial aspects of the contract will be conducted with the chosen Firm at the conclusion of the selection process. This process should include the Firm’s representatives who have signature authority to enter into contracts.

Firms, or their authorized representatives, are expected to fully inform themselves as to conditions, requirements, and specifications before submitting proposals. Failure to do so will be at the Firm’s own risk. The Firm may withdraw a proposal prior to the proposal submission closing date and time by requesting to do so in writing.

The Firm shall obtain and maintain liability insurance, worker’s compensation insurance, and comply with all other standards or regulations required by Federal, State or local statues, ordinances and rules during the performance of any contract between San Pablo EDC and the Firm. Proof of insurance should be presented to San Pablo EDC immediately upon request.

In the event the successful Firm, through any cause, should fail to fulfill the agreed upon obligations in an effective and timely manner, the San Pablo EDC shall have the right to terminate its contract by specifying the date of termination in a written notice to the selected Firm. The cancellation shall become effective on the date as specified in the notice of cancellation sent to the Firm.
Any contract resulting from the acceptance of a proposal shall contain, at a minimum, all applicable provisions of this RFP. The Selection Team may take the following action in order to form an agreement between San Pablo EDC and the selected Firm: enter into negotiations in an effort to reach a mutually satisfactory agreement, which represents a contractual obligation and will be executed by both San Pablo EDC and the selected Firm. This agreement will be based on proposal documents, the submitted proposal, and the associated negotiations.

Contact

Communication regarding this RFP, including requests for additional information or clarification, may only be directed to the Selection Team contact person as follows:

Leslay Choy, Executive Director
San Pablo EDC
Email: leslayc@sanpabloedc.org
Phone: 510-215-3201
Cell: 510-928-0186

The Selection Team is not bound by any statement, written or oral, made by any person other than the contact persons mentioned above. It is not acceptable to approach other San Pablo EDC Directors, staff, or contractors for further information about this RFP. Any Firm who does so, either directly or indirectly, may be disqualified from this process.

Confidentiality

This RFP process is confidential. A Firm receiving this document must not make any public statement in relation to this RFP, the RFP process, the Firm’s response, or the Firm’s participation in the RFP process without the Selection Team Chair’s prior written consent. Failure to respect the confidentiality clause of this contract will eliminate the Firm from consideration.