



Committee Members:

- Jeff Wobser, at-large – Committee Chair
- Dennis Hellmann, Ward 2
- Joshua Palmer, Ward 7
- Grant Russel, at-large
- Tom Shindledecker, at-large
- Mayor Christina Muryn
- Jim Staschiak, Auditor

Staff:

Rob Martin (SSD)

Guests:

Meeting Start Time: 6:00 PM

Meeting End Time: 6:35 PM

Agenda:

Call to Order

Roll Call

Approval of Minutes

New Items

1. Continue RFP discussions

Adjournment

Jeff Wobser, Strategic Planning Committee Chair

COMMITTEE REPORT
THE CITY COUNCIL OF THE CITY OF FINDLAY, OHIO

The **STRATEGIC PLANNING COMMITTEE** met on August 17, 2021 to continue Request for Proposals (RFP) discussions.

We recommend: *That council approve The RFP as submitted.*

Aye Nay


Jeff Wobser, Chairman

Aye Nay

Absent
Dennis Hellmann

Aye Nay


Joshua Palmer

LEGISLATION: _____

Aye Nay


Grant Russel


DATE: August 17, 2021

Aye Nay


Tom Shindledecker

COMMITTEE: STRATEGIC PLANNING

Aye Nay


Mayor Muryn

Aye Nay


Auditor Staschiak



City of Findlay Strategic Plan Request for Proposals August 2021

Introduction

In the Spring of 2021, the City of Findlay, Ohio (City) invited firms to submit qualifications to conduct a city-wide Strategic Planning process. Ten (10) firms submitted responses and were reviewed by the City of Findlay City Council Strategic Planning Committee. Following review of the responses, four (4) firms are requested to submit a proposal to partner with the City along with various community members, business leaders, local school districts, and other community organizations to prepare a comprehensive Council Driven Strategic Plan.

The City of Findlay government is proud of the rich history and vibrant community we have today and hopes that this process will yield outcomes that can be utilized to guide city government decision making and set a clear vision for the community at large for decades to come.

The following document includes:

- Introduction
- Project Description
- Scope of Work and Deliverables
- Schedule
- Response Format
- Submissions
- Evaluation Criteria
- Other Requirements
- Appendices

Project Description

The City of Findlay is looking for a team with sufficient experience to work effectively in a collaborative framework with City Employees, the public, business and industry representatives, service clubs, non-profit organizations, school districts, and city elected officials. The process must include extensive and sustained public involvement activities, including innovative outreach efforts through various approaches toward the goal of engaging a broad and deep cross section of the community. The City is looking for a blend of involvement and collaborative approaches that will engage all community members, including those that typically are not engaged in civic or community dialogue. It is the expectation that the selected firm, in coordination with the Strategic Planning Committee, will be responsible for all project management and material development. The selected firm will also be the lead facilitator of all outreach.

In addition to the items listed below, it is important that the selected firm establish and sustain credibility with citizens and decision-makers. It is also essential that the selected team have the ability to:

- Reference, as appropriate, previously completed studies, plans, and goals;
- Make recommendations that are financially feasible and legally permissible within the City's statutory requirements under the Ohio Revised Code;
- Develop customized strategies that will be effective within the political and social environment of the community;
- Review and evaluate the process and outcomes with current and upcoming planning efforts and decision-making

processes among a variety of organizations within the community;

- Effectively facilitate and carry out a variety of public outreach methods and activities;
- Use a variety of media, activities, and methods to capture, focus, and engage citizens, and decision makers; and
- Develop and manage the process to achieve outcomes that are representative of the entire community.

Scope of Work and Deliverables

The firm will be expected to produce the following products and outcomes and to provide these and other services:

- **Develop a compilation document** that brings together the entire strategic planning process, review of current state, analysis, recommendations, etc. This document should be in a format in which it can be publicly shared and adopted by City Council and affirmed by the Mayor.
- **Identify and recommend** strategies, policies, projects, etc. with a short, mid, and long-term perspective, inclusive of financial, capital, and directional components.
- **Develop an Action Plan.** The Action Plan should contain strategies that would set a direction and general guidance for implementing one or more of the elements identified through the strategic planning process. Each strategy would have at least one action that supports the implementation of the strategy. The action plan should be logically structured to include a description of the action, recommended responsible party, potential partners for implementation, potential timeframes, potential funding opportunities, and priorities for implementation. Priority should be given to action items that the City of Findlay has direct leadership in, while also utilizing this opportunity to identify other key opportunities within the community as a whole.
- **Maintenance of Strategic Plan.** Recommend processes and timeframes to maintain and ensure the resulting plan is a living, actionable document.
- **Analysis and Findings.** Perform an analysis of current state, emerging, and projected trends and evaluate potential impacts, constraints, and opportunities.
- **Develop a Communications and Outreach Plan.** Develop a plan to engage, involve, and collaborate directly with the public. The plan should include innovative or other effective means to engage community members that do not normally participate and a website for regular communication. Work with City Council, City staff, the Strategic Planning Committee, and other stakeholders to develop key messages, implement media-related strategies, and refine or reframe those, if necessary. Advise City staff regarding media relations and other key activities.
- **Effective Collaboration and Project Management.** Produce the final products and accomplish the project objectives and outcomes with close interaction with City Council and the Strategic Planning Committee. Attend meetings, develop materials, make presentations and produce reports and other documents of key activities and findings. Provide regular communications to all key stakeholders including appointed and elected officials, community groups, and the general public. Design, manage, and implement public involvement and outreach strategies and revise these if necessary to meet project objectives and achieve outcomes. Facilitate a variety of community events. Provide other consulting services relating to the Scope of Work, such as meeting facilitation and management, technical analysis, synthesizing information, and project management.
- **Compile Community Principles** that provide an overall foundation for the City organization and can garner community support.

- **Develop Goals, Policies, and Processes**, where appropriate, that the City of Findlay Administration and City Council may utilize as guidance for future decision making.
- **Identify and Prepare the Core Values or Core Values Statement for the City Government.** A “core values” statement or core values would be one of the intended outcomes of the Communication and Outreach Plans. This piece should include an accompanying narrative explaining its development and other relevant information that can serve to deepen understanding and create lasting value.
- **Develop the Vision and Mission Statement for the City Government.** Based upon the Core Values Statement, a Vision and Mission Statement would be developed.
- **Other items** as deemed appropriate by the City of Findlay Strategic Planning Committee.

Note: In addition to the items listed above, all data, analysis, multi-media materials, master copies (hard and digital) of final products, and all other relevant documentation shall be provided to the City for project files.

Schedule

Below is a tentative schedule related to the review and selection of firm.

- **Friday, September 10, 2021:** Send Request for Proposals to selected firms
- **Wednesday, September 15, 2021:** Hold scheduled pre-bid meeting (*Virtual*)
- **Friday, October 1, 2021:** RFP Responses due to City of Findlay (*See below submission guidelines*)
- **Friday, October 15, 2021:** Presentations from firms completed by
- **Tuesday, October 19, 2021:** Strategic Planning Committee will meet to select the firm
- **Wednesday, October 20, 2021:** Firm notified

Response Format

To be considered, a completed response must be submitted on time and must address each of the following items listed in this section. The firms’ response shall be limited to 30 pages (excluding covers and blank dividers and appendices) and a text font of 12-point or larger. Formatting to provide visual interest and flow of document is excluded from these formatting restrictions. Maps, resumes, and professional references accompanying responses as attached appendices will not be counted as part of the 30-page limit.

- Past Involvement with Similar Projects & References
- Project Specific Approach & Workplan
- Fee Proposal
- Point of Contact: Include the name, phone number, and email address of person(s) in your organization authorized to execute the Scope of Services with the City
- Appendices

All firms will be required to complete a 30 minute in person presentation, excluding question and answer, to the Strategic Planning Committee following submission of their proposal and prior to a firm being selected.

Submissions

Completed responses should be addressed to Findlay City Council Strategic Planning Committee, c/o Mayor Christina Muryn at 318 Dorney Plaza, Rm 310, Findlay, OH 45840. Electronic copies should also be sent to Strategic-

Planning@findlayohio.com. Responses must arrive at these addresses no later than 5:00 PM Eastern Time, Friday, October 8, 2021.

Interested firms shall submit seven (7) hard copies of their response including a contract for legal review and committee consideration and one digital copy of all submitted materials. The City of Findlay reserves the right to request additional information following a review of the initial submission. The City of Findlay may retain other firms to assist in the review of any aspects of the response.

Any substantive changes to the RFP will be conveyed in writing to all selected firms.

Any responses received after the requested time or date will not be opened and shall not be considered.

By issuing this RFP, the City of Findlay is not committing itself to award a contract or pay any costs incurred in the preparation of responses. The City further reserves the right to accept or reject any or all responses received, to waive formalities, and/or to cancel the RFP in part or in its entirety if it is in the best interest of the City.

Responses to this RFP will be subject to all applicable open records laws. Further, the names of the responding firms shall be released to the public following the submission date and time.

Evaluation Criteria

The following criteria will be used by the City Council's Strategic Planning Committee to evaluate qualification submissions:

1. **Project Specific Approach and Workplan** (Including tentative project timeline): A detailed work plan is to be presented that lists all tasks determined to be necessary to accomplish the scope of work. The work plan shall define resources needed for each task (title and individual person hours) and the respondent's staff person(s) who will complete the project task. In addition, the work plan shall include a timeline depicting the sequence and duration of tasks showing how the work will be organized and executed.
 - a. The work plan shall specifically address each of the following areas: (1) outreach, (2) strategic planning, and (3) change management.
 - b. The work plan must identify information the Respondent will need from City staff in order to complete the project. Include estimated time and resource commitment from City staff.
 - c. The work plan shall include any other information that the Respondent believes to be pertinent, but not specifically asked for elsewhere.
 - d. The work plan should include proposed steps, if any, to expedite completion of the project. This will be given due consideration during evaluation of proposals.
2. **Past Involvement with Similar Projects and References:** The written proposal must include a list of specific experience in group facilitation and training and indicate proven ability in implementing similar projects by the respondent and the individuals to be involved in the project. A list of three (3) client references must be provided for similar projects recently completed. It shall include the firm/agency name, address, telephone number, project title, and contact person.
3. **Project Scope Understanding and Responsiveness:** A clear understanding of the nature and scope of the Strategic Planning RFP and the types of services needed to prepare an actionable and living strategic plan.
4. **Fee Proposal:** Fee quotations are to include the names, title, hourly rates, and any other details, including hours of effort for each team member by task and sub-task, by which the overall and project element costs have been

derived. The fee quotation is to relate in detail to each item of the proposed work plan. Respondents shall be capable of justifying the details of the fee proposal relative to personnel costs, material, and time. The fee proposed must include the total estimated cost for the project when it is 100% complete.

Evaluation Criteria	Points
Project Specific Approach and Work Plan	35
Past Involvement with Similar Projects and References	30
Project Scope Understanding and Responsiveness	20
Fees	10
Discretionary Score	5
Total	100

Other Requirements

All facts and opinions stated within this RFP and all supporting documents and data are based on information available from a variety of sources. No representation or warranty is made with respect thereto.

The City reserves the right to modify the selection process or other aspects of this RFP at its sole discretion. All firms that have requested the RFP will be notified of modifications, as applicable.

The City reserves the right to accept a firm's response even if it does not contain all the information in response to this RFP. The City also reserves the right to reject without cause all responses to this RFP. The City reserves the right to reject, or request replacement of, individual team members or firms comprising a team.

The City of Findlay will not be liable in any way for any costs incurred by respondents in replying to this RFP.

Governing Law: This agreement shall be governed by and construed in accordance with the substantive laws of the State of Ohio, without regard to principle of conflict of laws that would require application of the laws of any other jurisdiction. By responding to this Request for Proposals, the parties agree to abide by all federal, state, and local rules unless otherwise waived by the City of Findlay.

Non-Discrimination: The City of Findlay requires all contractors and offerors doing business with the City not to discriminate against anyone on the basis of race, age, color, religion, gender, ancestry, national origin, marital status, mental or physical disability unrelated to ability, familial status, or sexual orientation.

REFERENCE CHECK

Name of Firm: _____

Project Referenced: _____

Owner: _____ Contact Person: _____

Fax No: _____ E-mail Address: _____

What services did the firm provide? (Testing, project development, design, construction inspection, etc.)

When was project started and completed? _____

Firm's representative you worked with most closely _____

	Poor (1 pt)	Fair (2 pt)	Good (3 pt)	Excellent (4 pt)	Superior (5 pt)
Please rate the overall quality of work/design performed by the firm, considering plan errors and omissions as an indicator					
Please rate the technical innovation shown by the firm in the design of the project					
Please rate the firm's performance in terms of meeting schedules and deadlines					
Please rate the firm's performance in terms of controlling costs and adhering to the budget					
Please rate the firm's overall attitude and ability to communicate and work cooperatively with owner					

General comments: _____
