

***Katahdin Collaborative  
Citizen Driven Regional Vision Plan***

# **Request for Qualifications**

***Issue Date: July 5, 2017***

***Submission Deadline: July 21, 2017***

***Key Words: Community vision, Citizen-driven, regional***

# **1. Overview of the Request**

## **Introduction**

The Katahdin Collaborative is a network of economic and community development oriented organizations and businesses in the Katahdin Region of Maine. The Collaborative invites consultants to submit their qualifications to conduct a region-wide visioning process. Consultants will work with the region's diverse demographics, business leaders, community members, local school districts, businesses and other community organizations to create a unified vision statement and clear action plan for implementation and measurement of success.

The Katahdin Collaborative wishes for this visioning process to build on the great work of multiple organizations and municipalities throughout the region who have been focused on community and economic development and further foster connections and ownership for successful implementation.

## **Project Description**

The Katahdin Collaborative proposes to complete a region-wide visioning process with an anticipated timeline of less than 15 months. The process must include extensive, diverse and effective engagement of the public and other key stakeholders within the region. The intended outcomes include identifying and analyzing emerging trends and regional issues; articulating core assets and values; building ownership throughout the region through training of community members to lead meetings and fostering connections throughout the region; developing a unifying vision statement; establishing an action plan that translates the regional vision into local, actionable items; and defining a method to revisit and update the vision and action plan.

The Katahdin Collaborative is looking for a consultant team with sufficient experience to work effectively in a collaborative framework with other team members, the public, citizen committees, business and industry representatives, service clubs, non-profit organizations, school and city elected officials, and staff. The visioning process must include extensive and sustained public involvement activities, including innovative outreach efforts through various collaborative approaches toward the goal of engaging a broad and deep cross section of the region.

A steering committee has been organized to oversee the project and provide input to the consultants regarding the scope of work, process design, and creation of the action plan. Our Katahdin will provide a locally based project support staff person at 0.25 FTE.

## **2. Geographic Scope**

Katahdin Region: Seven towns and unorganized territories along the Katahdin Woods and Waters scenic-byway, including Mt. Chase, Patten, Sherman, Stacyville, Medway, East Millinocket, and Millinocket.

## **3. Request for Qualifications**

### **3.1 Inquiries**

All inquiries related to this RFQ are to be directed, in writing, to Lucy Van Hook

via email at Lucy@ourkatahdin.com.

### **3.2 Closing Date**

A complete electronic copy of your response must be received before **5:00 pm EDT on Friday July 21, 2017** at Lucy@ourkatahdin.com. The subject line of your submission should read: RFQ Katahdin Regional Vision. The cover email should include the name and contact information of the respondent.

### **3.3 Qualifications Review Committee**

The Qualifications Review Committee will be comprised of members of the Katahdin Vision Design Team. These members were selected from the larger membership of the Katahdin Collaborative, and represent a diverse spectrum of towns, businesses, and sectors.

### **3.4 Review and Selection**

The Qualifications Review Committee will check responses against the identified criteria. Please refer to the Evaluation Criteria specified in section 5. Selected firms/consultants will be asked for an interview to discuss the scope of work and how their qualifications apply to the visioning process.

The schedule for the selection of a project consultant team is as follows:

RFQ Advertised: July 5, 2017  
RFQ Response Deadline: July 21, 2017 (5:00 PM EDT)  
Interviews: Early August, 2017  
Consultant Selection: August, 2017  
Contract Authorized: September, 2017  
Commence Project: October 2, 2017

### **3.5 Acceptance of Responses**

The RFQ is not a binding agreement to purchase goods or services. Responses to an RFQ are assessed in light of the qualification review criteria and, if chosen will be contacted for an interview.

## **4. Scope of Work**

In addition to the items listed below, it is important that the consultant team selected work to remain cognizant of the need for the project to establish and sustain credibility with citizens and decision-makers. It is also essential that the selected team have the ability to:

- Develop customized strategies that will be effective within the political and social environment of the region;
- Link the process and outcomes with current and upcoming planning efforts and decision making processes among organizations and municipalities within the region;
- Facilitate a variety of public outreach methods and activities;
- Use a variety of media, activities and methods to capture, focus and engage citizens, decision makers and other key players;

- Strengthening community connections;
- Develop local skills through training of community members to facilitate meetings; and
- Develop and manage the process to achieve outcomes perceived as balanced and authentic by as many community stakeholders as possible.

At this time, there is not a specific outline of tasks or project management structure for this project. However, it is expected that the work will be approached as a collaborative partnership between community members, service clubs, non-profit organizations, business representatives and school and city elected officials and staff with the consultant taking the lead on project management, facilitation of collaborative discussions, task implementation and follow-through. Additionally, the preferred approach will be phased, with the consultant(s) working with the steering committee to design the visioning process (phase 1), and then implement the visioning process to create a Citizen Driven Regional Vision with a clear action plan for implementation and measurement of success (phase 2).

The consultant team selected to work in partnership with the region on this project will be expected to produce the following products and outcomes and provide the following services:

- **Effective Collaboration and Project Management.** Produce the final products and accomplish the project objectives and outcomes with close interaction with Our Katahdin staff and the steering committee. Attend steering committee meetings, develop materials, make presentations and produce reports and other documents of key activities and findings. Design, manage and implement public involvement and revise these if necessary to meet project objectives and achieve outcomes. Ensure coordinated approach for outreach strategies. Provide other consulting services relating to the Scope of Work as meeting facilitation and management, technical analysis, synthesizing information and project management.
- **Coordinate Development of an Outreach Plan.** Develop a plan to engage, involve, and collaborate directly with the public, including youth and other community stakeholders throughout the entire process. This would include innovative or other effective ways to engage community members that do not normally participate.
- **Coordinate on the Development of a Communications Plan.** Participate in the development of a Communication Plan to ensure it meets the needs of the public participation and engagement process.
- **Analysis and Findings.** Integrate findings that will be provided by a third party who will be contracted to compile and analyze relevant data, identify and evaluate issues, values and concerns held by the region. Identify current, emerging and projected trends and evaluate potential impacts, constraints and opportunities.
- **Prepare the Core Values Statement.** A “core values” statement 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 Regional Vision Statement.** Based upon the Core Values Statement, and extensive public input a Regional Vision Statement would be developed.

- **Develop a Vision Action Plan.** The Vision Action Plan would contain strategies that would set a direction and general guidance for implementing one or more of the elements of the Vision Statement. 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, lead partner to champion the implementation effort, potential partners for implementation, timeframe and priorities for implementation.
- **Maintenance of Vision Statement and Vision Action Plans.** Recommend mechanisms and timeframes for Regional partners to gather and maintain focus on the Vision and Vision Action Plan through annual vision fair or other technique. Recommendations should also be made regarding the process to keep the Vision and Vision Action Plan current. The Vision and Vision Action Plan should be considered a living document that will need regular updates adjustments to reflect accomplishments and changes in the community.

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 Katahdin Collaborative for project files.

## 5. Evaluation Criteria

Criteria for evaluation include:

- A. Experience leading a citizen driven regional visioning process to develop a unifying vision with clear action plan for implementation and measuring success.
- B. Experience getting people involved, strengthening community connections, and helping people identify synergies in working together.
- C. Experience in developing local skills through training of community members to facilitate meetings.
- D. The consultant team has the experience, professional skills and resources needed to provide the services to undertake the project successfully and on schedule. Professional references may also provide strong indication of consultant team capabilities. We encourage independent consultants to identify a team of consultants he or she would work with to deliver this project.
- E. References (3)

The selection committee will review all proposal materials and may confer with professional references identified by proposing consultant teams.

## 6. Submission Requirements

Please include the following in your response:

- A. A completed cover page with the consultant(s)' or consulting firm's name, contact information, and website, if applicable
- B. A statement of interest
- C. A resume outlining the respondent's experience, the experience of key team members and a response to the qualification review criteria
- D. Three professional references

## **7. Conflict of Interest**

A conflict of interest exists wherever an individual could benefit directly from a decision over which they may have influence. A conflict of interest occurs when a staff member or consultant attempts to promote a private or personal interest that results in an interference with the objective exercise of their job responsibilities, or gains any advantage by virtue of his/her position. Conflicts of interest may be real, potential or perceived.

The respondent should disclose conflicts of interest, in writing, to the review committee who will consider the nature of the respondent's responsibilities and the degree of potential or apparent conflict in deciding the course of action that the respondent needs to take to remedy the conflict of interest.

## **8. Limitations**

All facts and opinions stated within this RFQ, 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 Katahdin Collaborative reserves the right to modify the selection process or other aspects of this RFQ at its sole discretion. All firms that have requested the RFQ will be notified of modifications, as applicable. The Katahdin Collaborative reserves the right to move forward with a response even if it does not contain all the information in response to this Request for Qualifications. The Katahdin Collaborative also reserves the right to reject without cause all responses to this RFQ. The Katahdin Collaborative reserves the right to reject, or request replacement of, individual team members or firms comprising a consultant team. Upon selection of a consultant team for the project, negotiations will be undertaken regarding final project scope and budget.