

[Addenda #1 – Revisions Noted]

***COUNTY OF INDIANA,
PENNSYLVANIA***

***ACTING THROUGH THE
INDIANA COUNTY BOARD OF COMMISSIONERS***

**PROFESSIONAL SERVICES FOR AN
ECONOMIC DEVELOPMENT STRATEGIC PLAN**

REQUEST FOR PROPOSAL

RESPOND NO LATER THAN:

**MAY 6, 2022
3:00 PM**

INQUIRIES

**BYRON G. STAUFFER, JR., EXECUTIVE DIRECTOR
INDIANA COUNTY OFFICE OF PLANNING & DEVELOPMENT
801 WATER STREET, INDIANA, PA 15701-1705
PH. 724-465-3870 | EMAIL: byronjr@ceo.co.indiana.pa.us**

INTRODUCTION

Summary of the County:

Indiana County is a 6th class county located in Southwestern Pennsylvania (15th Congressional District |14th Congressional District beginning next term) and is included in the [Indiana, PA Micropolitan Statistical Area \(μSA\)](#). Indiana County is also a part of the [Pittsburgh-New Castle-Weirton, PA-OH-WV Combined Statistical Area \(CSA\)](#). The County's 2022 Budget is \$46,141,174 with General Real Estate Millage of 4.205 and Debt Service Millage of .70. Demographically, Indiana County's census population peaked in the 1980s, and has been gradually declining for decades with much change due to migration. The loss of major employers, such as the R&P Coal Company, Robertshaw Controls, Fisher Scientific, FMC Corporation, Polyvision Corp., Seasonal and its successor Gorell Windows & Doors, have significantly contributed to a weakening economy. The U.S. Census Bureau indicates that Indiana County's current reported Median Household Income is \$49,320, over 20% less than the state-wide average of \$61,744 and indicates an aging workforce. The Indiana County Profile report published by the Pennsylvania Department of Labor and Industry Center for Workforce Information and Analysis indicates an unemployment rate of 4.8% as of December 2021. Although this is lower than the PA average unemployment of 5.4%, this rate does not account for the more than 1,000 persons that have left the labor force entirely. Considering the data and trends outlined above, the Indiana County Commissioners wish to keep undue tax burden off its citizens and already stressed municipalities.

The Indiana County Board of Commissioners, in collaboration with the Indiana County Planning Commission, for land use and purposes of consistency with the [Indiana County Comprehensive Plan](#), adopted in September 2012, and in partnership with the affiliate members of the [Indiana County Center for Economic Operations \(CEO\)](#), including the Indiana County Board of Commissioners, the Indiana County Chamber of Commerce, the Indiana County Development Corporation, the Indiana County Tourist Bureau and Indiana University of Pennsylvania, are desirous of developing a long-term economic development strategic plan.

A. PROPOSAL SUBMISSION

1. Seven (7) copies of the sealed proposal, as well as a complete electronic copy available on a USB flash drive, must be submitted not later than May 6, 2022 at 3:00 PM.

PROPOSAL SUBMISSION:

INDIANA COUNTY OFFICE OF PLANNING & DEVELOPMENT 801 WATER STREET, INDIANA, PA 15701-1705

2. The envelope(s) must be clearly marked on the outside **"INDIANA COUNTY ECONOMIC DEVELOPMENT STRATEGIC PLAN PROPOSAL."**
3. Proposal must be mailed or hand delivered. No faxed proposals will be accepted.
4. Proposals will be handled confidentially by **County** during the pre-award process.
5. Acceptance of a proposal and contract award shall be contingent upon the **County** being granted State Funding for the Strategic Management Planning Program.
6. The **County** will not be responsible for any expenses incurred by a Proposer in connection with this procurement.
7. All proposals shall be valid and binding for a period of 90 days.

B. QUESTIONS

Any questions concerning the Request for Proposal should be directed as follows:

**Byron G. Stauffer, Jr., Executive Director,
Indiana County Office of Planning & Development
801 Water Street, Indiana, PA 15701-1705
Phone: 724-465-3870 | Email: byronjr@ceo.co.indiana.pa.us**

I. GENERAL CONDITIONS

- A. No verbal instructions or verbal information to Proposer (hereafter proposer or contractor) will be binding on the **County**. These written specifications will be considered clear and complete unless written attention is called to any apparent discrepancies or incompleteness before the opening of the proposals. Should any alterations to these specifications be made in the form of written addenda, they will be emailed to all contractors. These addenda shall then be part of these specifications.
- B. Submission of a proposal will be considered as conclusive evidence of the Contractor's complete examination and understanding of the specifications.
- C. The **County** reserves the right to reject any or all proposals; the right to request additional information from any Proposer; the right in its sole discretion to accept the proposal considered most favorable; and the right to waive minor irregularities in the procedures or proposals if it is deemed in the best interest of the County.

The **County** reserves the right to negotiate with Proposers to establish variations from the original proposal(s), including proposed cost, which may be in the interest of the County.

- D. The award will be made to the responsive and responsible Contractor whose proposal, conforming to specifications, will be most advantageous to the **County**. Price and other factors will be considered, such as delivery time, quality, service, experience and specific skills and disciplines represented on the consulting team, etc. The award may or may not be made to the consultant or contractor with the lowest cost price proposal.
- E. The **County** shall have the right, without voiding the contract, to make amendments to the items or work covered by the specifications. In case such amendments are made, an equitable price adjustment shall be made between the **County** and the Contractor. All adjustments in price shall be made in writing.
- F. The Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or handicap. The Contractor will take affirmative action to ensure that applicants are employed without regard to race, color, religion, sex, age, handicap, or national origin. Contractors will take steps to ensure employees are treated during employment without regard to race, color, religion, sex, age, handicap, or national origin. Such action shall include but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.
- G. The Contractor shall not initiate work or incur any cost until such time as the **County** receives confirmation that grant funds shall be available, at which time the **County** shall issue a Notice to Proceed.

- H. **CONTRACT TERMINATION:** A contract may be cancelled by the **County** by giving Contractor a minimum of seven (7) business days written notice.
- I. **INDEMNIFICATION:** The Contractor shall hold the **County** harmless from and indemnify the **County** against any and all claims, demands and actions based upon or arising out of any activities performed by the Contractor and its employees and agents under this Contract and shall, at the request of the **County**, defend any and all actions brought against the **County** based upon any such claims or demands.
- J. **INSURANCE:** The successful Contractor, prior to commencing work, shall provide at its expense the following insurance to the **County**, evidenced by Certificates of Insurance. Each certificate shall require that notice be given thirty (30) days prior to cancellation or material change in the policies to the County's representative.

Workers' Compensation Including Occupational Disease and Employer's Liability Insurance

- 1. Statutory-amounts and coverage as required by Pennsylvania Workmen's Compensation and Occupational Disease Laws.
- 2. Employer's Liability – Bodily injury by:
 - a. Accident \$100,000 each employee
 - b. Disease \$500,000 minimum policy limit
 - c. Disease \$100,000 each employee

Liability

The successful Contractor shall maintain a commercial general liability insurance policy, using an occurrence form of coverage. The required coverage forms are:

- 1. **Comprehensive**
- 2. **Premises – Operation**
- 3. **Contractual Insurance**
- 4. **Independent Contractor**

The Comprehensive General Liability Policy shall have a minimum limit of liability of \$300,000 per occurrence.

Automobile liability coverage with minimum combined single limits of \$300,000 per occurrence.

The successful Contractor shall obtain total minimum coverage limits of \$1,000,000 per occurrence. The additional limits above the General Liability and Automobile Liability policies (required above) may be provided by Excess and/or Umbrella Liability policies.

All policies except Professional Liability shall name the County, its officers, agents, and employees as an Additional Insured. This coverage shall be reflected on the Certificates of Insurance.

II. SCOPE OF WORK

The County has secured grant funds offered by the Commonwealth of Pennsylvania, Department of Community and Economic Development's Strategic Management Planning Program. The purpose of the program is to establish short- and long-term financial and managerial objectives that will strengthen the fiscal capacity of the County government along with the integration of long-term community and economic development strategies that strengthen the area's tax base. The Strategic Management Planning Program is designed, in part, on recommended financial management practices of the Government Finance Officers Association (GFOA).

III. ENGAGEMENT OBJECTIVES

With financial assistance from this program and assistance from the consultant, the **County** will develop and implement **an Economic Development Strategic Plan**. The objectives of the engagement are to:

- A. Strengthen multi-year economic development strategy & workforce development planning processes for the **County**.
- B. Assist the **County** on a Strategic Management Planning Program basis to identify and address financial difficulties, including strategies for identifying and securing match funding towards grant funded projects.
- C. Develop the internal capacity within the **County** so that it is able to develop, adopt, monitor, and implement multi-year economic development strategy & workforce development planning and incorporate this process into the annual budget process.
- D. Assess possible revenue creation in the **County** which has limited taxation ability.
- E. Determine and establish the adoption of "best practices" for implementation of multi-year economic development strategy & workforce development planning for the **County** and develop standards that support financial stability.
- F. Provide a mechanism by which the **County** may adopt prioritized short- and long-term goals and objectives for subsequent adoption and implementation.
- G. Explore the opportunities for promoting inter-municipal and regional cooperation strategies and cost-sharing among area local governments and non-profit partnerships.
- H. Special Conditions: Develop strategies to address County's declining population and tax base, and explore opportunities to foster economic development and growth.

IV. STATEMENT OF WORK TO BE PERFORMED

The consultant shall provide professional services to support the tasks listed below. The **County** will work jointly with the selected consultant to develop a final, comprehensive scope of work and schedule for the project. Proposals should demonstrate the consultant's experience and expertise with the following range of services included in the project's scope of work:

The suggested scope may include the following elements:

- A. Review and analyze existing demographic, economic and labor force data. Use this data to show key demographic, social, economic and financial trends and forecasts for inclusion in the

final strategic plan. Please provide the data sources you propose to use in your response. Additional consideration will be given to firms that can demonstrate an effective visual representation of this data.

- B. Review and analyze relevant **County** comprehensive plan documents and other related planning documents for the community and incorporate the visions contained therein into the final report for this project, as applicable.
- C. Engage in a current SWOT analysis to identify the strengths, weaknesses, opportunities, and threats that affect our local economy that can serve as the basis for formulating goals, objectives and strategies.
 - a. While reviewing strengths/opportunities: Please consider the following sectors, Post-Secondary Education – Indiana University of Pennsylvania (IUP) and Westmoreland County Community College (WCCC) – how to retain graduates and talent?; Healthcare – Indiana Regional Medical Center (IRMC); Financial & Insurance Headquarters – First Commonwealth Bank, S&T Bank and The Reschini Group; Manufacturing – NORMA Pennsylvania, and other Indiana County Manufacturing Consortium members.
 - b. While reviewing weaknesses: Please consider broadband access, infrastructure (water, sewer, etc.), transportation issues and demographic trends.
 - c. While reviewing threats: Please consider the future of coal-fired power plant operations, which in some instances, however, there may be opportunities to explore.
- D. Stakeholder Engagement: Assist staff & Steering Committee with the identification of stakeholder groups and/or individuals for the purpose of input and discussion. Develop and facilitate, in coordination with staff, a public input strategy (number, frequency, time, location, etc.) to ensure the greatest level of participation.
- E. Hold a minimum of three (3) community visioning sessions and several stakeholder group engagements to capture community and stakeholder views on Indiana County’s future and incorporate this information into the final report. Provide a basic layout of your proposed meeting schedule with community and stakeholder groups in your response.
- F. Prepare a customized economic development strategy and workforce development plan for Indiana County, Pennsylvania for the next 10-years, setting forth specific goals and objectives for capitalizing on existing economic opportunities and suggesting potential solutions to the economic development challenges that the Indiana County faces. The final report shall propose activities, projects, and programs meant to implement goals set forth in the strategy. The final plan shall include specific recommendations for implementation of these activities and the preparation of basic performance measures to track and evaluate progress towards achieving the stated goals of the overall strategy. Specific questions to be answered by this plan include but are not limited to:
 - a. Targeted sectors for future development: Recommendations on what business sectors Indiana County should focus its efforts on for future commercial growth (i.e., manufacturing, light industrial, general office, professional services, business park, tourism, retail, etc.). How does Indiana County overcome barriers to this growth if any exist? How can Indiana County grow its Tourism and Conferencing sectors?
 - b. Business attraction and retention: Preparation of a basic business attraction/retention strategy for preferred business sectors identified by this report.
 - c. Business Park Opportunities and Multi-Tenant Facilities: Indiana County has existing business park developments along key corridors, US Route 22, US Route 119, and US Route 422 within excess of 150-acres, with Keystone Opportunity Zone designations through 2028 or 2029, at various ready-to-go levels, with some acreage that will become available for development in the next 24 months as we complete access, grading, and infrastructure. Using the data and analysis from this economic development strategic plan, provide at least two potentially successful development strategies for these properties that would result in the addition of living-wage jobs to the community. Strategies should include steps for how Indiana County can most effectively incentivize the type of land and building development proposed.

- d. Workforce Development: Recommendations on employer-based challenges for talent attraction within targeted key-industry sectors as well as identify barriers to employment for those seeking new job opportunities that may be in transition and for high-demand occupations and recommendations for addressing these obstacles for both the employer and the workforce.
- G. Economic Development Toolbox Recommendations: The Consultant shall recommend specific tools that can be utilized to implement the identified economic development strategies. Such tools could include, but are not limited to the following: incentives targeting preferred industries/business sectors, encouragement of "green" initiatives, tenant improvement (TI) financial assistance, Tax Increment Financing district(s), façade improvement programs, gap financing programs, direct incentives, i.e., low-interest loans, grants, tax credits, etc.
- H. Plan Development: In partnership with staff and the Steering Committee, the final plan document should be an attractive, engaging, and accessible document that outlines a clear approach to moving the needle for Indiana County, PA. An Executive Summary as well as supplemental reports providing more detailed analysis of demographic and economic trends, historical reports, meeting summaries and development projects will be developed as appendices. Sustainability, Diversity, Equity and Inclusion strategies, including geographic areas within the county, are important to our community and must be included to the fullest extent possible. Regular communication, coordination and the sharing of data will be required.

V. SUPPORT TEAM

The consultant will be expected to work with a consortium of individuals representing the **County's** management, elected officials, employees or community members, including the [Sustainable Economic Development Task Force](#) appointed by the **County** as part of the Steering Committee. The Indiana County Office of Planning & Development will contribute GIS services, mapping and analysis as needed to support the project in collaboration with the Consultant.

VI. SCHEDULE

During the review, the consultant may be required to meet with various elected or appointed officials, department heads, staff members or members of the public to discuss the progress of the engagement or related matters.

The consultant shall present all final reports to the **County** no later than 05/05/2023.

VII. EVALUATION CRITERIA

We will evaluate each response we receive and rank them based on the evaluation criteria listed below.

1. Completeness of submitted proposal – **5 points**
2. Qualification Statement that includes a cover letter, a roster of team members who will be working on this project, their professional qualifications, technical knowledge and experience creating economic development strategic reports. Include a price for your proposal. – **10 points**
3. Demonstration of specialized experience related to development of economic development strategic reports. Please describe what your team's approach to this assignment will be and outline how you will proceed with the creation of this report. Identify the sources of data you intend to use to complete the data review on page 6 of this RFP. – **40 points**
4. Provide two examples of a similar report you have created for a County in Pennsylvania or adjacent States. If there are sections of this report where your approach will differ substantially from the examples given, explain this in as much detail as possible. – **20 points**

5. Provide examples of your capacity to successfully convene, manage and gather data from community visioning events, stakeholder group sessions and other outreach activities. – **15 points**
6. Graphic design: Provide an example of an economic development strategic report you have produced for a previous client that highlights your firms' ability to effectively show data in a graphic format. – **10 points**
7. Total – **100 points**

VIII. DELIVERY OF RFP RESPONSES

Deliver seven (7) hard copies and one (1) electronic copy of your proposal on a USB flash drive (including the qualification statement) in a sealed envelope to the following address no later than 3:00 PM on May 6, 2022.

Indiana County Economic Development Strategic Plan Proposal

Attn: Byron G. Stauffer, Jr. Executive Director
Indiana County Office of Planning & Development
801 Water Street
Indiana, PA 15701-1705

Address questions, comments, or concerns regarding the project directly to Byron G. Stauffer, Jr., Executive Director, Indiana County Office of Planning & Development at 724-465-3870 or byronjr@ceo.co.indiana.pa.us. Any response to this Request for Proposal received after the above specified date will be deemed non-responsive. Submissions sent in via fax or email will not be accepted. Submissions that are late, incomplete or misdirected will be considered non-responsive, with no exceptions.

IX. CHANGES TO THE RFP

The **County** may change the terms and conditions of this RFP through written addenda. The **County** will post addenda, if any, to its website at the following address: <https://www.indianacountypa.gov/>. The **County** will not otherwise notify Proposers of addenda. By submitting a proposal, every consultant represents that it has reviewed the addenda and the proposal complies with the addenda.

X. EVALUATION OF THE PROPOSALS

The **County** reserves the right to reject all proposals submitted and to request additional information from Proposers. Notice is also given of the possibility that an award may be made without discussion or after limited negotiations. It is, therefore, important that all proposals contain the most favorable terms possible, and should be complete in all respects.

Proposals will be evaluated by a team consisting of representatives of the governing body of the **County** and others as selected by the **County**.

“THIS PROJECT IS FINANCED IN WHOLE OR IN PART BY FUNDING PROVIDED BY THE COMMONWEALTH OF PENNSYLVANIA, DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT, STRATEGIC MANAGEMENT PLANNING PROGRAM (STMP), THE INDIANA COUNTY CENTER FOR ECONOMIC OPERATIONS AND BY THE COUNTY OF INDIANA, UNDER THE DIRECTION OF THE INDIANA COUNTY BOARD OF COMMISSIONERS.”