

**FLORIDAWEST
ECONOMIC DEVELOPMENT ALLIANCE
REQUEST FOR PROPOSAL
for
ECONOMIC DEVELOPMENT CAPITAL FUNDRAISING CAMPAIGN**

The FloridaWest Economic Development Alliance, Inc. (FloridaWest) is issuing a request for proposals (RFP) from experienced economic development capital fundraising campaign professionals (consultant) to develop an economic development fundraising plan for FloridaWest.

Because of the nature of our work and the needs and opportunities identified within the FloridaWest 2023 Strategic Plan, it is our desire and intent to initiate the planning and implementation of a capital fundraising campaign as soon as possible. Our target schedule for the retention of a consulting firm and the roll-out of a funding campaign is as follows:

- September 6, 2023—RFP issued
- October 6, 2023—RFP proposals from interested firms due no later than 8:00 a.m. Central Standard Time and will be opened immediately thereafter
- October 9, 2023 Internal review of proposals received
- October 13, 2023 Executive Committee review of proposals received with Staff recommendations
- October 24, 2023—Full board vote on proposals received with Staff and Executive Committee Recommendations
- October 25, 2023—Notification of firm selected
- November 2, 2023—**Phase One** assessment process begins
- December 15, 2023—**Phase One** assessment completed and report submitted. If **Phase One** findings and recommendations of consultant are approved by the FloridaWest Board of Directors, **Phase Two** Capital Fundraising Campaign preparation begins immediately following the Phase One report

RFP DEADLINE: **October 6, 2023** no later than 8:00 a.m. Central Standard Time.

PROPOSERS ARE SOLEY RESPONSIBLE FOR THE DELIVERY OF THEIR SUBMITTALS. SUBMITTALS RECEIVED AFTER THE SPECIFIED DAY AND TIME WILL NOT BE CONSIDERED.

LATE SUBMITTALS RECEIVED AFTER THE AFOREMENTIONED DEADLINE DATE WILL NOT BE CONSIDERED. THE TIME OF RECEIPT WILL BE DETERMINED BY THE TIME THE SUBMITTAL IS RECEIVED. IT IS THE SOLE RESPONSIBILITY OF THE FIRM FOR ASSURING THAT THE RFP IS RECEIVED BY THE DESIGNATED DATE AND TIME.

To be considered, Firm/Team must submit either by email a Statement of Qualifications and costs clearly identified with a subject of **“RFP FLORIDAWEST ECONOMIC DEVELOPMENT CAPITAL FUNDRAISING CAMPAIGN SERVICES”**

Addressed to:

FloridaWest Economic Development Alliance, Inc.
mstoker@floridawesteda.com

SECTION 1 – INTRODUCTION

PURPOSE

The FloridaWest Economic Development Alliance, Inc. (“FloridaWest”) is issuing a request for proposals (RFP) from experienced capital funding campaign professionals (“Consultant”) to develop and successfully execute a fundraising campaign for FloridaWest.

OBJECTIVE

The Consultant will be key to setting the stage and raising the funds necessary for FloridaWest to fully implement its current five-year Strategic Plan that was developed through a robust planning and community engagement process.

The work product of the Consultant will be comprised of two (2) phases:

Phase One – Will include (but not be limited to) necessary initial due diligence to be fully conversant in the major programming/deliverables of the FloridaWest organization; understanding the key business and industry marketplace in Escambia County from both the public and private sector perspectives; conducting a sufficient number of on-site, in-person, face-to-face, one-on-one interviews to gather statistically valid input from the FloridaWest Board of Directors and professional staff, existing members and investors, plus additional public and private sector community leaders—with particular emphasis on inclusion of interviews with prospective investors from business and industry.

This thorough data gathering process and the Consultant’s expert analysis based on the empirical information obtained and recorded in the due diligence and interview process will result in a Phase One Report and Recommendations delivered and presented to FloridaWest. This product should clearly delineate to the FloridaWest decision makers the ideal operational and fundraising structure and funding goal to both fully implement the FloridaWest Strategic Plan and be able to create a clear investor value proposition that will ensure the success of the capital funding campaign to follow.

Phase Two – Upon successful completion of the Phase One deliverables and FloridaWest leadership acceptance of the work product and decision and authorization to move forward, Consultant will craft and begin implementation of the capital fundraising process (details listed in **Section 2** of this RFP)

ABOUT US

FloridaWest is a 501(c)(6) non-profit organization with a central purpose to promote industry and commerce, enhance the business climate, stimulate economic prosperity, support workforce development, promote community development and encourage public policies to achieve success in these areas.

FloridaWest is principally funded by Escambia County and the City of Pensacola and currently receives approximately 20% of its funds through investment by the private sector. FloridaWest engages with community partners to retain and attract new business, promote sustainable development, address infrastructure challenges and improve quality of life for its rapidly growing communities.

SECTION 2 – SCOPE OF SERVICES

The Consultant will provide the following services to FloridaWest’s capital funding campaign effort and will serve as a collaborative partner in working with the FloridaWest Board of Directors and professional staff to facilitate, organize, structure and execute a successful fundraising campaign.

The scope of services for **Phase One** includes:

- Consultant will review existing materials related to the FloridaWest 2023 Five-Year Strategic Plan, relevant collateral material, current programming, and action plans and efforts being undertaken to address the needs and well-being of rapidly growing communities in Escambia County.
- Develop a standardized questionnaire for use in the interview process that will be used to gather the needed input and provide statistically valid information.
- Consultant will interview FloridaWest board of director members and professional staff, elected and appointed officials, community leaders and stakeholders to gain knowledge and perspective of FloridaWest’s current and planned program of work actions/results as outlined in the FloridaWest Strategic Plan.
- Consultant will interview a representative and statistically valid cross-section of existing members and investors plus prospective new investors from the private sector and design a plan to meet expectations of the Value Proposition required to ensure financial support of the fundraising campaign to be accomplished in **Phase Two**.
- Consultant will make a formal presentation to the FloridaWest Board of Directors of the key findings from all due diligence and the **Phase One** assessment process. Include recommendations and your rationale for them, for any board of director decisions needed in preparation for proceeding from **Phase One** to **Phase Two**.
- Consultant will recommend any additional steps/actions needed prior to rolling-out the **Phase Two** process.

The scope of services for **Phase Two** includes:

- Upon approval from the FloridaWest Board of Directors to proceed with the **Phase Two** campaign fundraising process, Consultant will immediately initiate material development campaign preparation/implementation actions.
- Consultant will build an action plan and recommend programming that will be inclusive of the key elements of the FloridaWest Strategic Plan and the deliverables that the current and future investors/stakeholders will support and underwrite. Emphasis and outreach will be focused on investment by the private sector.
- Consultant will, in partnership with FloridaWest staff, write, develop, and produce all campaign related marketing materials, internal and external communications and all campaign tracking and reporting documents.
- Consultant will execute the capital fundraising plan in collaboration with FloridaWest board and staff leadership and will establish benchmarks and report on progress made in achieving those benchmarks on a timely and systematic basis.
- Consultant will collaborate with FloridaWest staff leadership in establishing a multi-audience communications strategy as to funding level benchmarks achieved in the fundraising campaign.

SECTION 3 – QUALIFICATIONS

FloridaWest is seeking an experienced economic development fundraising consultant with prior experience in guiding economic development board-level strategic planning operations and working successfully with all public and private sector parties in a collaborative process.

- Successful fundraising experience that is related to not-for-profit entities is required.
- Demonstrated work products that provide concise observations and strategies that focus on outcomes with a clearly articulated action plan are required.
- Demonstrated ability to deliver successful, on-time results is required.

SECTION 4 – SUBMISSION RESPONSE FORMAT AND CONTENT

Expected deliverables to be provided for both **Phase One** and **Phase Two** of this work assignment shall be clear, concise and focused and include a narrative, overall vision for both phases of the project with strategies, goals, benchmarks and other metrics to judge progress towards completing a successful capital fundraising effort.

The consultant should propose a flat-fee compensation figure for undertaking the capital fundraising assignment that aligns with the ability to achieve the major results and best manage the budget. The competitiveness of the fee proposal will be considered during the RFP review.

For a Final Submission, FloridaWest requires a written letter proposal of no more than twenty (20) pages (not including resumes) to cover the following:

A. Proposed Services--**Phase One** and **Phase Two**:

1. Identify a target timeline for each key aspect of the total project—including but not limited to planning, feasibility, recommendations, solicitation materials development, and fundraising process.
2. Define fees and expenses for each of the two phases. Cost should be comprehensive to include but not limited to fees and expenses.
3. Describe your **Phase One** fact finding and assessment process. Include how many in-person, one-on-one interviews will be conducted and quantify other fact finding that will be accomplished and a timeline for the process.
4. Define your interview process. How will you identify the specific persons you will interview?
5. List your expectations of the FloridaWest board and staff during both **Phase One** assessment/recommendations and **Phase Two** fundraising process.
6. State what information and recommendation components/categories will be included in your **Phase One** assessment report.
7. At the conclusion on the **Phase One** assessment/recommendations process, will you share with us an individual written report of input provided by each interviewee and the dollar amount they indicated they would consider investing in the campaign?
8. How will you determine who you will recommend to be recruited to partner with us/endorse the funding campaign? How is campaign leadership determined? When is campaign leadership recruited?
9. What is your process in terms of identifying prospects and once solicited, how do you follow-up-to-closure for each solicitation?
10. Describe the campaign materials that will need to be produced to support a successful campaign?
11. What happens if the campaign timeline needs to be extended to raise the funds needed?
12. Will you need access to office space, computer and printer equipment and internet?
13. Will you locate campaign consulting staff on-site in the community for the duration of the fundraising campaign? What are your housing/lodging expectations?
14. Do you have the capacity to accomplish both the **Phase One** and **Phase Two** process to completion given your other client commitments?
15. What post-campaign services do you provide?

B. Summary of the Proposer's Qualifications—please provide the following:

1. Short one-paragraph summaries of three other assessment and fundraising efforts of a similar nature.

2. Submit one concise example. Consultant may redact the name of the party for which work was completed.
 3. Resume or CV of consultant’s key individuals who will undertake the engagement. If any of these individuals were not part of the example provided, please state why the specific person is being recommended.
 4. Three references of prior work, including the name of the organization, contact name, phone number, and email address.
 5. Any additional information proposer wishes to convey that illustrate proposer’s understanding and knowledge of the subject matter of FloridaWest’s work effort.
- C. Right to Request Additional Information and Clarifications – FloridaWe4st reserves the right to request additional information or clarifications from proposers, or to allow for correction of errors or omissions.
- D. Right to Reject Proposals – FloridaWest reserves the right to reject any or all proposals submitted and solicit new proposals if necessary.

SECTION 5 – EVALUATION OF PROPOSALS Final rankings of the firms will be presented to the FloridaWest Board for approval and authorization to contract with top ranked firm. FloridaWest will base its selection on several factors including:

- Clarity of response to the engagement 30 POINTS
- Specific goals, costs, and process. 40 POINTS
- Depth of experience in undertaking work of a similar nature 20 POINTS
Including working with Boards and work product produced.
- Innovative approaches to completion of project 10 POINTS

FloridaWest may include a virtual interview of respondents as part of the evaluation and decision process.

FloridaWest, acting in its sole discretion, may elect to award to one or more firms, or to no firm, in a manner deemed to be in the best interest of FloridaWest.

SECTION 6 – PROCUREMENT RULES AND INFORMATION

Contact Person:

Melissa Stoker, Director of Operations
 FloridaWest Economic Development Alliance, Inc.
 3 West Garden Street, Suite 618, Pensacola, FL 32502
 850-898-2201 (Office)
 850-860-4177 (Cell)
 mstoker@floridawesteda.com

All questions regarding this Request should be directed in writing by email to Ms. Melissa Stoker. **Questions shall be submitted no later than 12:00 Noon local time on Friday, September 29th, 2022.** Questions submitted after that date and time will not be answered. Failure to submit requests in writing by the specified time shall not be grounds for a protest. Note: Written requirements in the Request may not be modified except through published addendum or amendment to this Request.

Calendar of Events:

Listed below are the important actions and dates/times by which the actions must be taken or completed. If FloridaWest finds it necessary to change any of these dates/times, it will be accomplished by addendum. All listed times are local time in Pensacola, Florida.

DATE/TIME	ACTION
September 29, 2023 12:00 Noon local time	Last Date for Receipt of Written Questions
October 6, 2023, no later than 8:00 AM	Close Date local time

RFP Opening:

Proposals are due at time and date specified in the paragraph entitled "Calendar of Events". The name of all firms submitting their qualifications shall be posted in the RFP package at FloridaWest board meeting.

Cost of Preparing RFP:

FloridaWest is not liable for any costs incurred by a firm in responding to this RFP, including those for interviews or presentations.

Disposals of RFP:

All RFP's become the property of FloridaWest and may be subject to public records requests.

Rules for Withdrawal:

Proposals may be modified or withdrawn by an appropriate document duly executed (in the manner that a RFP must be executed) and delivered to the place where proposals are to be submitted at any time prior to the opening of RFP.

Any submitted proposal shall remain open and subject to acceptance for a period of sixty (60) calendar days after the date of the opening.

Rejection of RFP:

FloridaWest reserves the right to accept or reject any proposal in its sole discretion. FloridaWest further reserves the right to accept or reject all nonconforming statements of qualifications. FloridaWest reserves the right to reject the statement of qualifications of any firm or individual if FloridaWest believes that it would not be in the best interest of FloridaWest to make an award to that firm or individual, because the statement of qualification is not responsive or responsible, or the firm or individual is unqualified or of doubtful financial ability or fails to meet any other pertinent standard or criteria established by FloridaWest.

Verbal Instructions:

No negotiations, decisions, or actions shall be initiated or executed by the firm as a result of any discussions with any FloridaWest employee or board member. Only those communications from firms, which are signed, and in writing will be recognized by FloridaWest as duly, authorized expressions on behalf of the firm.

Indemnification:

Firm shall indemnify and hold harmless FloridaWest, its officers, agents and employees, from all claims, suits or actions at law or equity, damages, losses, and expenses, whether direct or indirect, or consequential, including but not limited to charges of engineers, attorneys, and other professionals and costs of both

defense and appeal, in a court of law or other tribunal, for any reason whatsoever, including but not limited to bodily injury, sickness, disease or death of any person, including employees of Firm or any subcontractor, or injury to or destruction of property, including loss of use, which claims are arising out of, related to, connected with, or caused by (a) Firm, or any subcontractor or supplier of Firm, negligent performance or non-performance of the Project. The provisions of this indemnification agreement shall include all accidents, injuries and claims made, whether or not caused in part, by any act or omission of FloridaWest, their respective officers, agents, or employees, provided Firm shall not be required to indemnify FloridaWest for its own negligence.

Notices:

Any notices to be given under a Contract shall be given by United States Mail, addressed to Firm at its address stated therein, and to FloridaWest at its address stated therein. Additional notice may also be given by electronic mail in which case it shall be deemed that notice was provided on the date said electronic mail was received. The party providing notice by electronic mail shall confirm that the electronic mail was received by the other party.

Insurance Requirements:

The Firm selected may be required to purchase and maintain through the Contract period workers compensation, comprehensive general liability (occurrence form), comprehensive automobile liability, professional liability, including errors and omissions coverage if applicable, builder's risk, and other insurance as is appropriate for the Project being performed hereunder by firm, its employees, subcontractors or agents. The amounts and types of workers compensation, comprehensive general liability (occurrence form), and comprehensive automobile liability insurance shall conform to the following minimum requirements:

Sales And Use Tax:

The Proposer agrees that any and all applicable federal, state, and local sales and use taxes that are incurred by the Proposer are included in the stated fee proposal for the Project. FloridaWest is tax exempt from federal excise and state sales tax.

Addendums:

FloridaWest may issue Addendums to modify the proposal as deemed appropriate. Addendums and clarification to this RPP along with an Addendum Acknowledgement Form will be mailed to all vendors receiving this RFP. The Addendum Acknowledgement Form, which is included with each mail out, shall be signed by an authorized company representative, dated, and returned with proposal.

Representation:

The Proposer represents to FloridaWest that:

1. The Proposer is properly certified and licensed; is solvent financially; is experienced in and competent to provide the services.
2. The Proposer is familiar with all Federal, State, Local or other regulatory laws, ordinances, and regulations, which in any manner whatsoever, may affect the provision of services.

Public Access:

1. A request to inspect or copy public records relating to this RFP must be made directly to the FloridaWest. If FloridaWest does not possess the requested records, it will immediately notify the Consultant of the request, and the Consultant must provide all non-exempt records to FloridaWest or allow the records to be inspected or copied within a reasonable time (§119.0701(3)). If Consultant fails to provide the public records within a reasonable time, Consultant may be subject to penalties under §119.10, F.S.

2. Consultant shall comply with the requirements of Florida's Public Records law in accordance with Section 119.0701, Florida Statutes, the Consultant shall (1) Keep and maintain public records required by the public agency to perform the service; (2) Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided under Florida's Public Records law or as otherwise provided by law; (3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this contract if the Consultant does not transfer the records to the public agency; and (4) Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Consultant or keep and maintain public records required by the public agency to perform the service. If the Consultant transfers all public records to the public agency upon completion of the contract, the consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of this contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from public agency's custodian of public records, in a format that is compatible with the information technology system of the public agency.

IF CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONSULTANT SHALL CONTACT FLORIDAWEST

Term of Engagement:

Subject to satisfactory negotiation of terms, the initial term of this engagement is intended to be from November 2, 2023 through December 15, 2023 potential for Phase 2 to extend beyond that date.

FloridaWest reserves the right to terminate the contract with 30 days' notice.

FloridaWest may terminate the aforementioned contract at any time with or without cause, or with or without prior notice.