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# REQUEST FOR PROPOSALS: STRATEGIC PLANNING SERVICES

## PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants experienced in strategic planning to lead Lake Superior Community Partnership (LSCP) through a strategic planning process.

Specifically, LSCP is seeking a consultant to provide the following services:

- Work with the Board of Directors and leadership staff to articulate a clear strategic plan for LSCP for 2021-2024 (or 2026), to include:
  - Vision
  - Mission
  - Strategic Priorities
  - Specific, strategic goals for the organization to pursue over the next 3-5 years in pursuit of its mission
  - Indicators of success
  - Clear, easily communicated messages about who we are, what we do, who we serve, and what value we provide to stakeholders
- Conduct internal and external surveys of community leaders and stakeholders (15-25 people) to learn about community needs that LSCP could help support and perceptions impacting LSCP's ability to provide that support.
- Identify clear outcomes for how to measure organizational effectiveness, impact, and success.
- Facilitate all meetings and provide leadership, direction and expert consultation and advice related to the development of an effective strategic plan, including successful implementation.
- Deliverable should be a clear, easily consumed, strategic plan, accompanied by organizational messaging.

## ORGANIZATIONAL BACKGROUND

### *Current Mission Statement*

To stimulate and sustain a vibrant regional economy by facilitating economic growth and prosperity.

### *Current Values*

- *Leadership:* The LSCP will continue to consistently lead economic development efforts across the region, leveraging its staff, resources, and partners to spearhead major project efforts, secure collaborative support for key initiatives, and deliver measurable value to its constituents.
- *Expertise:* The LSCP will be regionally recognized and respected for its economic development expertise, its track record of delivering tangible results, and its highly capable, credible staff.



- *Focus:* The LSCP will maximize its positive impact on the region by remaining clearly and consistently focused on its core economic development mission, and by relentlessly pursuing its carefully crafted, publicly stated agenda.
- *Integrity:* The LSCP will consistently earn the respect and trust of its clients, partners, and peers by acting with honesty, integrity, and professionalism in all business dealings.

### **Organizational Structure**

LSCP has eight full-time staff that provide a variety of economic development and business retention services, marketing and event support, and membership support. The LSCP is also the employer of record for the Executive Director of the Dickinson Area Economic Alliance, and maintains a close partnership with the organization.

### **History of the Organization**

In the 1980's Marquette County community leaders came together to assist in solving issues affecting the County's mining industry and threatening to impact thousands of jobs. Once the crisis was averted, the group, known as the Lake Superior Jobs Coalition, became inactive until 1995, when the planned closure of the K.I. Sawyer Air Force Base was announced. By 1997, following efforts to redevelop K.I. Sawyer, the group had formally organized and changed its name to the Lake Superior Community Partnership, with leadership from labor, industry, business, religion, education, nonprofits, media, and government. Today, the LSCP is:

- Truly regional in nature; recognizing that we can accomplish far more together and that our competition is truly global.
- Built around true private-public partnership; recognizing that too often in the past we have not shared responsibility for the progress of our community.
- Focused on community development; recognizing that enduring economic benefit can spring only from a well of true community development and improvement.

Funding for the Partnership comes from both the private (80%) and public sectors (20%) with the non-profit organization being run similarly to a private business rather than a municipality.

### **The LSCP Today**

LSCP is at an interesting point in its organizational history:

1. A leadership transition occurred in early 2021, the first in 24 years.
2. LSCP is poised to look outward into the community to learn what needs exist and where they can help – to strategically leverage our track record and reputation to create more opportunities for growth and investment in Marquette County.
3. With multiple staff transitions and emerging economic development initiatives in the County and the region, opportunities exist to evaluate operations, facilities, and potential partnerships for greater efficiencies and impact.
4. Varying expectations and understanding of the role and benefits of economic development require clear, careful messaging about the LSCP's value, its role in the community, and how it works in partnership with other organizations and efforts.

## **PROJECT SCOPE**

1. Obtain feedback through interviews from Board members, organizational partners and members, staff, and key community stakeholders about LSCP's past roles and future value to the region. LSCP will work with the consultant to organize facilitated discussions with LSCP Officers and Board. Additionally, LSCP staff and Officers will identify key community stakeholders and partners to be surveyed and/or interviewed by the consultant. The consultant will work with LSCP to develop interview questions. Community stakeholders include business, local government, and community leaders. This input will be important for LSCP to learn of its successes and opportunities for improvement, and to better understand broader community perspectives, conditions, and opportunities. LSCP's leadership staff and board members will also be interviewed. Once the interviews are completed, the consultant will compile the feedback and present it to LSCP.
2. Review the organization's current vision, mission, values, roles of staff and board, and facilities/space and technology needs. The consultant will work with the staff and board to develop a process to review these topics. The consultant will lead the LSCP Board and staff in reviewing and modifying (if needed) its vision, mission, and values.
3. Informed by LSCP's history, mission, current work, and community needs, the consultant will guide the LSCP Officers, Board, and leadership staff in developing goals and measures of progress for the next 3-5 years. The consultant will help LSCP to complete a strategic plan that has programmatic, sustainable financial goals, indicators of success, and a realistic timeline with identified tasks to meet those goals.

## **REQUIRED MATERIALS FOR PROPOSALS**

- a. Provide the official name, address, phone number and email address of the applicant (organization or individual) as well as the name of the principal contact person and the name and title of the person authorized to execute the contract.
- b. Bios/resumes of key personnel fulfilling the contract, if awarded, including key qualifications and previous similar work experience.
- c. A description of the applicant's approach to strategic planning consultation, including methodology, perspective or philosophy that guides your work.
- d. Provide any recommended changes to the Project Scope that the application feels may better accomplish the development of the strategic plan.
- e. Provide a comprehensive work plan, including a timeline and a budget for completing the project.
- f. Reference and contact information of three organizations that have utilized your strategic planning or other relevant contract services in the last 24 months.

Proposals must be signed by an authorized individual(s) of the applicant organization and include the name, title, address, telephone number and email address of the individual(s) with authority to negotiate and contractually bind the individual/organization.

All proposals received will be considered in final format.

Applications should be received by LSCP before 5:00 pm EST on Monday, April 26, 2021.

If you have any questions, contact Sarah Lucas at [slucas@marquette.org](mailto:slucas@marquette.org) or (231) 920-2116.

## **REVIEW OF PROPOSALS**

Proposals will be reviewed and evaluated by the Strategic Planning Task Force and CEO who will recommend one or more candidate/company for consideration by the Board.

We expect to make a final decision on this matter no later than May 18, 2021, with notification to applicants occurring soon thereafter.

We will review proposals in accordance with the following criteria:

- ✓ The proposed approach to the Project Scope
- ✓ The level of experience of the individual(s) identified to fulfill the project
- ✓ The individual's/organization's experience with similar projects
- ✓ The total proposed cost

## **SELECTION CRITERIA**

Criteria for evaluation will include:

- ✓ Demonstrated knowledge, skills, and experience in conducting strategic planning projects in nonprofit organizations.
- ✓ The proposed approach to Project Scope and the qualifications of the consultant with cost as a factor.
- ✓ Understanding of economic development organizations.

## **CONTRACTUAL AGREEMENT**

LSCP will issue a contract/letter of agreement with the selected applicant, in which the manner and time of payment will be addressed.

- Input from Board, partners, and members through facilitated discussions and surveys about organizational vision, mission, and activities
- Identification of strategic priorities
- Recommendations for communication and clear messaging around strategic priorities
- Identification of opportunities for developing resources and working in partnership with local, regional, and statewide stakeholders