UNIVERSITY OF WEST FLORIDA
Invitation to Negotiate
Development of Northwest Florida’s Regional Strategy for Economic Transformation

COMPANY NAME: ________________________________________________________________
ADDRESS: _______________________________________________________________________
CITY/STATE/ZIP CODE: ____________________________________________________________
FEID NUMBER: ___________________________ DUNS NUMBER: ___________________________
CONTACT PERSON’S NAME/TITLE: ___________________________________________________
CONTACT PERSON’S EMAIL: _________________________ PHONE NUMBER: _______________

Awardee will be required to register in the System for Award Management (SAM)
(https://www.sam.gov/portal/SAM/#1) before the award is finalized. Please mark the appropriate box below:

_____ Company is registered in SAM and on-line Representations and Certifications incorporated in that record constitute a material representation of facts and are certified to be true and correct.

_____ Company will register in SAM if selected as awardee.

NAME/TITLE OF AUTHORIZED OFFICIAL *: ___________________________________________

SIGNATURE OF AUTHORIZED OFFICIAL *: ___________________________________________
*By affixing my signature on this proposal, I hereby certify that I am authorized to bind the above named company to the terms of this proposal.
**Project Description:**

The University of West Florida’s (UWF) Haas Center for Business Research and Economic Development (Haas Center) and Florida’s Great Northwest (Client) seek a strategic partner (Consultant) to develop a sound Regional Strategy for Economic Transformation in Northwest Florida. The strategy must have a particular emphasis on those counties most affected by the Deepwater Horizon oil spill and will focus on job creation, private investment and asset building, and economic diversification.

**Region Scope:**

The region includes the thirteen counties comprising Northwest Florida. These counties include, from west to east: Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, Bay, Jackson, Calhoun, Gulf, Liberty, Franklin, and Wakulla. Among these, the eight coastal counties (Escambia, Santa Rosa, Okaloosa, Walton, Bay, Gulf, Franklin, and Wakulla Counties) are designated by state and federal statute as “disproportionately affected” by the Deepwater Horizon oil spill in 2010. This region includes three Metropolitan Statistical Areas, from west to east: Pensacola-Ferry Pass-Brent, Crestview-Fort Walton Beach-Destin, and Panama City.

**Project Governance:**

The University of West Florida’s Haas Center is the recipient of U.S. Economic Development Administration (EDA) award number 04-69-07141, “Regional Strategy for Economic Transformation.” The funding associated with this EDA project will allow UWF and its partner, Florida’s Great Northwest (www.floridasgreatnorthwest.com), to develop and begin implementation of a Regional Strategy for Economic Transformation. Florida’s Great Northwest (FGNW) is the regional economic development organization serving the targeted counties, and the output of the proposed project will guide its strategic plan for economic development of the region. UWF’s Haas Center will provide all economic research associated with the project and is the fiscal agent for the EDA grant which was secured to fund this work. Representatives from each of these organizations comprise an in-region Project Team that will coordinate the efforts and guide the work of the Consultant in this project.

Partners and stakeholders from within the region and from supporting state agencies have been engaged in the foundational work associated with development of this regional strategy. These partners serve as an Advisory Group to the project.

FGNW will convene partners and community stakeholders throughout the process to gather input and solicit feedback on components of the strategy. Once the strategy has been developed, FGNW will continue to convene partners to implement the strategy and will track and report on progress/metrics associated with the strategy.

**Scope of Work**

The components of the project described below may be performed either concurrently, or in the sequence preferred by the Consultant, as best fits the objectives of the project. Project development
and completion is expected to incorporate multiple feedback loops between the Client and Consultant in order to develop the best possible actionable Regional Strategy for Economic Transformation.

**Component 1: Research and Data Analysis**
The Consultant will review research provided by the in-Region Project Team and indicate additional secondary and/or primary research necessary to complete the Scope of Work. The Haas Center will be performing all research functions associated with the development of this Regional Strategy for Economic Transformation. The Haas Center will analyze specific laborsheds within the 13 county region, as well as the region as a whole. Such analysis will include:

- Laborshed analysis
- Local and Traded Industry Cluster analysis, using modified clustermapping.org definitions
- Occupational Cluster Analysis, using modified Purdue University cluster definitions
- Shift-share analysis
- Gap analysis, for NAICS and O*NET clusters
- Business migration patterns
- Entrepreneurial activity metrics

The preliminary analysis will be complete and available in a draft form upon the award of the subcontract. Additional research can be compiled at the Consultant’s request. The Haas Center currently maintains subscriptions or licenses for the following data sources and tools: Economic Modeling (EMSI); Moody’s Analytics; Reference USA; Claritas/Nielsen; Demographics Now; Dun and Bradstreet/National Establishment Time-Series (NETS, for Florida, California and Illinois); Woods and Poole 2016 MSA Profile and CEDDS 2016; REMI PI+ 1.7.7 Florida Counties; IMPLAN; Chmura; Metro Market Trends (mmtinfo.com).

**Component 2: Identify Targets for increased regional competitiveness.**
The Consultant will identify the high-level strategies with the greatest potential for sustainable economic growth that can be woven together to create the Regional Strategy for Economic Transformation. Key components of this work include:

1. **Identification of benchmark comparison regions**: Identify regions against which Northwest Florida should benchmark metrics of economic and community development activities for the 13-county region. Selection of comparison regions should be informed by both the data as well as key stakeholder input. The Consultant will provide guidance to the metrics selected for use in an economic indicator dashboard, with the development, implementation and maintenance of the dashboard performed by the Haas Center.

2. **Target Industry Selection**: State level economic development policy is set by Enterprise Florida, Inc. (EFI) and its partner entities. These policies use the Six Pillars approach (developed by the Florida Chamber of Commerce Foundation) to develop assets and opportunities, with enhanced economic development incentives available for selected industry sectors. The Consultant will identify industry clusters with the most potential for development within the region and its laborsheds. This assessment will include EFI targeted industry sectors, as well as any other sectors or clusters that might be appropriate for the Northwest Florida region. Key consideration should be given to the following infrastructure assets and gaps needed to support the growth of these clusters:
   - physical infrastructure
human infrastructure (existing talent, secondary & post-secondary education, and military transition talent)
- research and development
- supplier development
- quality of place
- target marketing program enhancement
- existing industry support strategies
- other infrastructure components necessary to support these specific clusters
- NOTE: In addition, for each targeted industry cluster, the Consultant will deliver Target Industry Reports which contain detailed profiles for those industries which can be utilized by economic development, workforce development, education and other partners in the region to better understand the target industry cluster drivers and key considerations for modification of their efforts to support these clusters.

3. **Entrepreneurial Ecosystem Analysis**: Utilizing data provided by the project team regarding existing entrepreneurial development assets and ecosystem vibrancy, identify the assets and gaps within each metro region and the region at large to support the growth of entrepreneurial companies. Key consideration should be given to:
   - funding
   - advice
   - space
   - training
   - events
   - research
   - quality of place
   - attraction strategies
   - human infrastructure

**Component 3: Partner with In-Region Project Team to gather input from key stakeholders**
Input will be gathered from a variety of stakeholders and partners throughout the development of the Regional Strategy for Economic Transformation. Working closely with the FGNW staff and partners, it is desired that the selected Consultant participate in multiple meetings with the Advisory Group and in a series of focus groups with target audiences. The In-Region Project Team will schedule these focus groups so that they occur during 2 – 3 trips to the area. Focus group audiences will include:
   - Existing businesses/ industry organizations
   - Entrepreneurs/ small business support organizations
   - Local elected officials
   - Military leadership
   - Relevant federal agencies
   - Young professionals
   - Education and workforce leadership

In addition, the Consultant will be provided feedback received on stakeholder surveys that will be conducted by the Haas Center. The Consultant will assist in developing the survey questions to ensure the input received is as valuable as possible to the development of the strategy.

The purpose of the focus groups will be two-fold:
1. To build a common vision for the region that the resulting strategy will grow the region toward AND identify the regional values on which the regional strategy will be developed.

2. Gather input on the strategy that takes into consideration elements not adequately captured with NAICS and SOC codes and other secondary research. Input may also be sought to clarify input received from the stakeholder surveys.

**Deliverable: Presentation of the Draft Strategy**  
**Due: December 16, 2016**

The Consultant will combine components 1, 2 and 3 into a Regional Strategy for Economic Transformation to guide economic transformation including:

- targeted anchor industry development strategies with supporting supplier network and cluster development strategies;
- infrastructure and site development;
- research and development capacity building;
- talent development and attraction, including secondary/post-secondary certification/degree pathways, and transition pathways from military and underemployed populations into training/education for targeted sectors;
- entrepreneurial ecosystem development;
- foreign direct investment and international trade development;
- target marketing program enhancement and
- other programs of specific interest to project partners.

It is critical for the strategy to set forth an actionable plan that the region and the communities can adopt, in whole or in part, and implement the directives set forth. Whenever possible, the plan should be framed in terms consistent with the Six Pillars Framework promoted by the Florida Chamber Foundation. For each section of the strategy, the region seeks specific actions, suggested partners, timeline, budget and metrics for implementation. The Consultant will work with the Project Team and Advisory Group to gather information not otherwise available.

The Consultant will present the draft strategy to the in-region Project Team. This will commence a two week period for the Client to submit comments, questions and suggestions to be incorporated into the final strategy.

**Deliverable: Regional Strategy for Economic Transformation**  
**Due: January 20, 2017**

The Consultant will deliver the final Regional Strategy for Economic Transformation to the Client on or before the due date set forth above.

Once adopted, the plan will be shared by the In-Region Project Team with the appropriate audiences to garner further support. Florida’s Great Northwest will continue to serve as a convener of partners to implement, track and report on progress made in implementation of the strategy.

**Format of the Proposal:**

The proposal shall not exceed 12 pages (not including cover page, budget, or appendix). The pages should be numbered at the bottom with 1” margins for top, bottom, and sides. The required font size must be no smaller than 12 point. Please format the proposal in the following order:
1. Completed cover page signed by the company’s official authorized to bind the company to the proposal
2. Company overview, year established, staffing, capabilities, client mix breakdown by revenue
3. Proposer’s understanding of the purpose, goals, and desired outcomes of the project.
4. Proposed Methodology
5. Projected Tasks, Timeline, and Deliverables
6. Budget and Contractual Matters
7. Project Staffing and Qualifications
8. Three References (names and contact information)

Appendix: Each proposal should include an appendix that summarizes and provides key process details and deliverable examples for three similar regional strategy development projects that this consultant/team has worked on in the last 5 years. No page count restrictions.

**Budget:**

A budget and budget justification explaining each category of costs must be included in the proposal (not included in 12 page limitation). Categories include:

- Salaries
- Fringe Benefits
- Travel
- Supplies
- Other
- Facilities and Administrative Costs (F&A, also called Indirect Costs) – If company claims F&A costs a copy of their F&A Agreement must be included in the proposal. If company does not have an F&A Agreement, the 10% de minimus rate may be charged. No profit fee may be charged.

No costs incurred in the preparation of a response to this Invitation to Negotiate may be claimed. No costs incurred prior to the subcontract start date may be recovered.

**Evaluation Criteria:**

- Company stability/capabilities
- Expertise of project team members
- Methodology/Approach/Timeline
- Previous experience with similar projects/References
- Fees

**Proposal Submission:**

1. If you are interested, please confirm receipt of this Invitation to Negotiate and your intent to submit a proposal by completing the web form hosted at haas.uwf.edu/ITN by Monday, August 15th.
2. All questions regarding this Invitation to Negotiate must be submitted in writing using the web form hosted at haas.uwf.edu/ITN and must be received by August 18, 2016 at 1:00 pm CT. Verbal questions or those submitted after the period specified will not be addressed.
3. Respondents to this solicitation or persons acting on their behalf may not contact any employee or officer of the Project Team concerning any aspect of this solicitation, except in writing through the project portal at haas.uwf.edu/ITN between the release of the Invitation to Negotiate and the end of the 72 hour period following the agency posting the notice of intended award. Violations of this provision may be grounds for rejecting a response. The Project Team includes UWF, the Haas Center, FGNW, as well as the executives, board members and partners of FGNW.

4. Final proposal submittal must be received by Friday, Aug 26, 2016 by 5:00 pm CT. Proposals received after this date and time will not be considered. You may email a pdf of your proposal to haascenter@uwf.edu. Please include “Haas ITN Proposal” along with your company name in the subject line. As an alternative or in addition to the email submission, you may mail a USB drive containing a pdf of your proposal to:

Haas Center
Attn: ITN Proposal
220 W Garden St, Suite 304
Pensacola, FL 32502

NOTE: The email account has a 25MB file attachment limit. If your proposal is larger than 25MB, please break it into multiple emails indicating “file X of Y” in the subject line.

Timeline Overview

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/5/16</td>
<td>ITN release date</td>
</tr>
<tr>
<td>8/8/16</td>
<td>Q&amp;A period opens</td>
</tr>
<tr>
<td>8/15/16</td>
<td>Confirm your intent to submit a proposal</td>
</tr>
<tr>
<td>8/18/16</td>
<td>Q&amp;A period closes</td>
</tr>
<tr>
<td>8/19/16</td>
<td>Responses to final questions posted to portal</td>
</tr>
<tr>
<td>8/26/16</td>
<td>Deadline for proposals</td>
</tr>
<tr>
<td>8/30/16</td>
<td>Begin negotiations with short list of consultants</td>
</tr>
<tr>
<td>9/2/16</td>
<td>Consultant awarded contract</td>
</tr>
<tr>
<td>12/16/16</td>
<td>Deadline to present Draft Strategy to Clients</td>
</tr>
<tr>
<td>1/2/17</td>
<td>Client Commenting period closes</td>
</tr>
<tr>
<td>1/20/17</td>
<td>Final Strategy Due</td>
</tr>
</tbody>
</table>

Notes

- The Client desires a rapid turnaround on this project.
- The evaluation committee reserves the right to select one or multiple vendors for the work requested, or to reject all proposals.
- All work undertaken for this project is subject to Florida’s Public Record Law, Chapter 119 and Federal Freedom of Information Act provisions. Any proprietary information included in the proposal must be identified as confidential.
- All communication must be in writing through the project portal located at haas.uwf.edu/ITN. Responses to questions will be posted on the portal on Friday, August 19, 2016.
• If you encounter a technical problem with the project portal, you may submit questions via email to haascenter@uwf.edu with “Haas ITN” and your company name in the subject line.

• If awarded a subcontract as a result of this Invitation to Negotiate, responder will comply with the provisions of OMB Uniform Guidance (2 CFR 200) and all associated terms and conditions.

• It is anticipated that the subcontract resulting from this Invitation to Negotiate will commence Friday, September 2, 2016 or the subcontract execution date, whichever is later, with the final deliverable due Friday, January 20, 2017. The subcontract resulting from this Invitation to Negotiate is contingent on the availability of funds.

• Respondent will not be authorized to enter into subcontracts for performance of services under the subcontract resulting from this solicitation. Respondents may not propose subcontract agreements as part of their proposal.

• Respondent must secure and maintain, at its sole expense and for the duration of the subcontract, term insurance policies to protect themselves, the University of West Florida, and the State of Florida. This includes Workers’ Compensation, General Liability, and Commercial Liability Insurance. Certificates of Insurance coverage described above must be furnished by the respondent upon request by the University of West Florida.

• Respondent must save and hold harmless and indemnify the University of West Florida and the State of Florida against any and all liability, claims, judgments or costs of whatsoever kind or nature for injury to, or death of any person or persons and for loss of damage to any property resulting from the use, service operation, or performance of work under the terms of any subcontract issued as a result of this Invitation to Negotiate, resulting in whole or in part from the negligent or intentional acts or omissions of subcontractor or any of the employees, agents, or representatives of the subcontractor.

Contact Information:

Zach Jenkins
Director, Haas Center for Business Research and Economic Development
haascenter@uwf.edu
220 W Garden St, Suite 304
Pensacola, FL 32502

*Include “Haas ITN” and your company name in the subject line or attention line of all written communication