



REQUEST FOR QUALIFICATIONS OR PROPOSALS Mission, Vision, & Strategic Planning Facilitator

Issue Date: August 6, 2021

Due Date: September 15, 2021, at 5pm EST

Facilitator Decision Date: October 6, 2021

Facilitation Date Range: First two weeks of November 2021, back-up date range, the first week of December 2021.

Project:

Building a Collaborative Structure for the Upper Peninsula Food Exchange (UPFE) Steering Committee

Contact Name:

Sarah Monte

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Central Contact - UP Food Exchange

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Purpose:

The U.P. Food Exchange seeks a strategic planning facilitator that will actively engage our committee members in thinking about the future and planning for the sustainability of our collaboration. This work includes the following:

1. Create a mission and vision statement for the U.P. Food Exchange Steering Committee.
2. Develop strategic goals to guide our organization over the next three years.
3. Help our team through the process of defining the structure of the group, including how decisions are made, how new members are added, and the relationship between the Steering Committee and Administrative team.

Organization Summary:

The U.P. Food Exchange (UPFE) is a resource portal for farmers, businesses, and individuals looking to participate in the local food system. UPFE hosts an online marketplace platform that functions as a food hub, aggregating local food products for institutions, restaurants, and retail establishments in Michigan's Upper Peninsula. Alongside this resource, partners across the Upper Peninsula meet monthly as the UPFE Steering Committee, a food systems council that coordinates food summit events and supports

local food projects that relate to food policy, community education, food safety, business development, farm to school, and food sovereignty.

The U.P. Food Exchange is a collaboration of multiple stakeholders across multiple fields of work, including university extension, local government, cooperative retail grocery, farming, and value chain coordination. Members have developed local food policy template language and guidance, coordinated CSA marketing, provided education and technical assistance, and generally supported the development of the local food system in Michigan's Upper Peninsula.

Project Background:

UPFE has been able to develop and complete projects organically, with no formal guidelines or structure for the organization. UPFE Steering Committee members are interested in developing a structure and goals that will advance our work on a strategic scale and ensure the longevity of the organization.

This capacity building work is possible thanks to the Food SPICE (Food System Partners Investing in Communities and Entrepreneurs) project in Michigan. Funded by a USDA RFSP grant, this project is coordinated by the MSU Center for Regional Food Systems with the goal of increasing collaboration between food system entities in the target communities of the Upper Peninsula and Battle Creek. The scope of work in the U.P. relates to food infrastructure development, food systems organization capacity support and food producer organization capacity support. The project supports activities specific to the goals of the, currently, eight project partners in the U.P. while increasing space for cooperation and broader, collaborative impact on the regional food system.

Additionally, some work has already been done towards building UPFE's collaborative structure through programming and grants funds distributed via the Michigan Local Food Council Network (MLFCN). Their six-part learning cohort provided information, examples, and exercises designed to help councils set their mission, vision, and strategic goals. Completed information by UPFE during this process should be utilized in the design of the facilitated meeting and documentation.

Packet information is found at [**upfoodexchange.com/rfq**](http://upfoodexchange.com/rfq)

Project Deliverables:

- 1-2 day in-person facilitation with UPFE Food Systems team in Marquette Michigan, unless local, state, and federal regulations concerning COVID-19 require a virtual meeting.
- Follow-up virtual meeting if necessary for completion of the project.
- A summation document following the facilitation should include:
 - SWOT Analysis or similar exercise.
 - A final mission statement.
 - A final vision statement.
 - A final name and designation for the group.
 - A final strategic goals document that includes focused and targeted priorities for the next 3 years.
 - Written plan for organizational structure; including committee structures, administrative roles, and organizational policy for decision making, conflict resolution, and selection of new team members.

Required Qualifications:

- Demonstrated experience with facilitating a consensus-based strategic goal setting meeting.
- Strong facilitation skills.
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors.
- Experience at gathering and utilizing data to inform the strategic planning process.
- Experience in inspiring others to think creatively and innovatively.
- Ability to constructively challenge participants.
- Experience in local and regional food systems and food policy.
- Experience with rural communities.
- Ability to travel to the Upper Peninsula to conduct the facilitation in-person.

Instructions

Proposals should be prepared in a straightforward manner to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content, not decorative displays, and promotional materials. Any material submitted that is proprietary or confidential should be indicated as such.

Proposals must include:

- 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.
- Bios/resumes/CV of key personnel fulfilling the contract, if awarded, including key qualifications and previous similar work projects.
- Three references who can speak to their experience with the consultant in similar projects.
- A description of the applicant's approach to facilitation and/or strategic planning consultation, including methodology, perspective, or philosophy that guides your work.
- A detailed budget that breaks out expenses including time, materials and supplies, report presentation, travel expenses, and any other expected expenses.
- A statement on how work done through the Michigan Local Food Council Learning Cohort will be integrated into the facilitation and/or utilized for final recommendations.
- Example(s) of a finished strategic plan or facilitation follow-up document developed by the individual assigned to this project.
- Provide general availability for in-person facilitation in the Upper Peninsula for fall and winter 2021.
- 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.

Proposal Submission:

All proposals must be submitted by 5:00pm EST, September 15, 2021 as a PDF-format email attachment. Proposals will only be received via email. If an offeror requests to use an alternate method of submission, submit a question by the due date to confirm the method is acceptable.

Proposals and additional questions concerning this RFQ should be emailed to Sarah Monte at smonte@marquettefood.coop with the subject heading "Proposal for UPFE Facilitation."

UPFE will reach a decision on awarding the contract no later than October, contingent upon the quality of bid proposals received.

Proposal Review:

UPFE will require qualified applicants to be interviewed in person or virtually. UPFE shall not be liable for any costs, including any travel, incurred by the respondent prior to award of the contract.

The U.P. Food Exchange will award the work to the applicant having the combination of price, qualifications, experience, staffing, general reputation, and scheduling most advantageous to the council.

The U.P. Food Exchange reserves the right to reject any and/or all proposals and to waive any irregularity in proposals received whenever such rejection or waiver is in the best interest of the group. The respondent to whom the award is made will be notified at the earliest possible date.

The contents of the proposal of the successful respondent will become contractual obligations if a contract is issued. Failure of the successful bidder to accept these obligations will result in cancellation of the award. A contract entered into as a result of this RFQP will have a fee structure with a specified maximum cost, not to be exceeded. Insurance, including automobile insurance associated with travel to meetings is the responsibility of the applicant.

The contract shall not be considered executed unless signed by Sarah Monte and certification as to the availability of funds by USDA is received. Signatures on behalf of U. P. Food Exchange other than those cited above shall not constitute contract execution by UPFE and the contract shall be null and void. In the event that local, state, or federal guidance around COVID-19 affects our ability to meet in person, we reserve the right to re-negotiate any contracts.

Equal Employment Opportunity

The respondents' attention is called to the requirements for ensuring that employees and applicants for employment are not discriminated against on any basis including race, color, religion, sex or national origin.

Conflict of Interest

Offerors must disclose and describe the nature of any known actual or potential conflicts of interest between either the firm or its proposed project team and UPFE or its fiduciary, the Marquette Food Co-op, or any other conflicts that reasonably may significantly interfere with completion of the project deliverables. Lack of disclosure may result in cancellation of any award by UPFE.