



## Request for Qualifications and Proposal

### Strategic Plan Consulting

Date Issued:

Deadline:

Issued by:

Greater Salt Lake Municipal Services District

## **1. INTRODUCTION**

The Greater Salt Lake Municipal Services District (the “MSD”) is soliciting proposals from qualified firms to provide one or more of the following services: (1) executive engagement with the Board of Trustees and staff; (2) visioning and future casting sessions; (3) strategic planning offsite meetings (retreat); (4) strategic plan drafting; and (5) and follow-up meetings.

## **2. BACKGROUND**

Greater Salt Lake Municipal Services District was established in 2015 and is located within Salt Lake County, Utah. The District is a Local District, created under the Utah’s Special District Code 17B 2a-1101. The District is comprised of five member townships: Copperton Metro Township, Emigration Canyon Metro Township, Kearns Metro Township, Magna Metro Township and White City Metro Township (the “Townships”); the Town of Brighton, and most of unincorporated Salt Lake County. The MSD was created under Utah Code 10-2a, part four, which allows metro townships to be recognized as municipalities. The Townships gained official recognition as municipalities in January of 2017 through a general election of the citizens that took place in November 2015. Members of the MSD are outside of Salt Lake City’s boundaries but are within Salt Lake County.

Many of the municipal services were formerly provided by a division of Salt Lake County (Township Services) until the District began operating independently in 2017. Until the adoption of Senate Bill 124 which was effective May 2019, the County Auditor, County Mayor, County Treasurer and County Surveyor acted in the same administrative functions for the MSD. The County Mayor was previously the District executive. With the passage of SB 124, that role is now assumed by the General Manager, who is appointed by the Board of Trustees. The District offices are located in Salt Lake City, the capital of Utah, approximately three miles south of downtown. The District’s partners are located throughout Salt Lake County including canyons to the east and south of Salt Lake County.

MSD operates under a governing Board of Trustees, comprised of elected mayors representing each Metro Township within the District boundaries, a member of the Brighton Town Council, and one Salt Lake County Council person representing unincorporated Salt Lake County. Policymaking is vested in the governing Board consisting of the seven Board members. The governing Board is responsible, among other things, for passing resolutions, adopting the budget, appointing committees and setting personnel policies. The District’s General Manager carries out the policies of the Governing Board and oversees the day-to-day operations of the District.

## **3. SCOPE OF THE WORK**

Consultants should respond to this RFQ with a Statement of Qualifications (“SOQ”) that address all the following services. These descriptions identify the minimum scope of services that may be provided by a qualified consultant. Specific details of the scope of work will be identified after the selection of the consultant.

- 1) Strategic planning
  - a) Provide technical assistance to develop a strategic plan that will be the foundation for short and long-term planning decisions.

- b) Assist in the creation of vision, mission, core values and goals for the organization.
- 2) Stakeholder engagement
  - a) Interface with the stakeholders to identify key components and strategies:
    - i) Board of Trustees
    - ii) Staff
    - iii) Key service providers, and
    - iv) Public, if applicable

#### 4. RESPONDING TO THE RFQ

The MSD welcomes all respondents and encourages them to share their expertise in strategic planning consultancy that can advance our organization. Tell us why you are the right partner for this project. We will assess the responses based upon the respondent's experience and how well the responses address the scope of work. We request the following specific information from respondents:

- 1) **Cover letter:** Please include company name, address of the nearest local office, contact name for a response, and that person's contact information. Please keep the cover letter to one page.
- 2) **Experience:** Provide a statement of experience discussing past performance, capabilities and qualifications. Identify other similar projects with which your firm has been involved. Explain how your firm is a suitable partner for the described scope of work.
- 3) **Additional information:** Provide any additional information that will help us evaluate your firm's fit for this scope of work. Please note, you may only include information that directly responds to the RFQ, please do not include any promotional material or company brochures.
- 4) **Compensation:** Include the proposed compensation structure and payment schedule for your services.
- 5) **References:** Provide references, including contract information, from previous contracts or partnerships.

**Please keep the response to no more than 10 pages total** (including cover page). Please do not attach any marketing material, brochures or items that do not directly respond to this RFQ.

#### 5. EVALUATION CRITERIA

The evaluation committee will consider the following factors in rating respondents:

- 1) Price
- 2) Company Profile and Experience
- 3) Expertise
- 4) Availability
- 5) References

#### 6. PROJECT TIMELINE

The following schedule is the anticipated timeline of the project.

- RFP advertised on or before October 16, 2020

- Questions due by email on October 29, 2020 at 12:00 pm. All questions will be shared with all interested parties.
- Proposals are due by November 6, 2020 at 5:00 pm.
- Presentations to Board of Trustees November 12, 2020.
- Evaluation and selection on or November 19, 2020

## **7. RFQ RESPONSE PROCESS**

Questions related to this RFQ should be emailed to Brian Hartsell, Associate General Manager, at [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov) no later than 12:00 pm (MST) on October 2, 2020. Any submission of questions relating to this RFQ shall include "Strategic Plan Consulting" in the email subject line and include the name of the person and agency submitting the question(s). Do **not** make personal contact with members of the Board of Trustees and District Administration with the exception of Brian Hartsell at [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov).

The MSD assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt. The receipt of response to this RFQ does not constitute an agreement between the MSD and the submitting firm. The MSD reserves the right to accept or reject any and all submissions.

Final RFQ submission must be received in an electronic form by 5:00 pm (MST) on October 7, 2020. Please send responses by email in PDF format to [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov). Your final RFQ submission shall include "Strategic Plan Consulting" in the email subject line.

## **8. CONTRACT**

The awarded firm will be required to execute a contract acceptable to both parties. Firm may include a sample contract that will be reviewed by the MSD.

**For more information regarding the MSD please visit our website at [www.msd.gov](http://www.msd.gov).**