

**BEFORE THE BOARD OF COUNTY COMMISSIONERS  
LEWIS COUNTY, WASHINGTON**

**IN THE MATTER OF:**

RESOLUTION NO. 22-056

ISSUE A REQUEST FOR PROPOSALS (RFP) FOR  
LONG-RANGE STRATEGIC PLANNING SERVICES  
FOR LEWIS COUNTY

**WHEREAS**, the Lewis County Board of County Commissioners (BOCC) adopted the Community-Based Strategic Plan "Vision 2025" on November 2, 2020; and

**WHEREAS**, Lewis County has identified a need for long-range visioning and goal setting within the county; and

**WHEREAS**, qualified consulting services are needed to help guide the county; and

**WHEREAS**, Lewis County is seeking proposals from qualified consulting firms with expertise in long-term strategic planning services; and

**WHEREAS**, publication to solicit for long-term strategic planning professional services is needed to contract with a professional consultant.

**NOW THEREFORE BE IT RESOLVED** by the BOCC that the County Manager is instructed to prepare an RFP, evaluate responses and negotiate a contract with the qualified consultant for BOCC approval; and the Clerk of the Lewis County BOCC is instructed to proceed with all appropriate and necessary notifications to advertise for said purpose.

DONE IN OPEN SESSION this 8th day of March, 2022.

APPROVED AS TO FORM:  
Jonathan Meyer, Prosecuting Attorney

BOARD OF COUNTY COMMISSIONERS  
LEWIS COUNTY, WASHINGTON

Amber Smith  
By: Amber Smith,  
Deputy Prosecuting Attorney

Lindsey R. Pollock, DVM  
Lindsey R. Pollock, DVM, Chair

ATTEST:

Sean D. Swope  
Sean D. Swope, Vice Chair

Rieva Lester  
Rieva Lester,  
Clerk of the Lewis County Board of  
County Commissioners

F. Lee Grose  
F. Lee Grose, Commissioner



# **LEWIS COUNTY REQUEST FOR PROPOSALS**

## **Long-Range Strategic Planning Services**

**Please Submit five (5) Paper Copies and  
One (1) Electronic PDF by:  
March 28, 2022  
5:00 PM**

**Lewis County  
351 NW North St  
Chehalis, WA 98532**



## **REQUEST FOR PROPOSALS (RFP): LONG-RANGE STRATEGIC PLANNING SERVICES**

### **Estimated RFP Schedule**

RFP Issued:	March 8, 2022
Final Date for Questions Related to RFP:	March 21, 2022
Proposal Deadline:	March 28, 2022
Applicant Interviews:	April 4-8, 2022*
Selection of Consultant by Board of County Commissioners and Contract Development:	April 18, 2022*

*\*Exact dates are subject to change at the county's discretion*

Any interested individual may request to be on an email list to receive updates on the RFP process, including addenda to the RFP if any are issued. Lewis County may alter the RFP at any time.

### **Submittal Instructions**

Written proposals and an electronic PDF must be received by Lewis County no later than 5PM PST on March 28, 2022. Proposals received after this deadline will not be accepted or considered.

Send proposals to:  
Erik Martin  
County Manager  
Lewis County  
351 NW North St  
Chehalis, WA 98532

Direct questions regarding the RFP to:  
Lara McRea  
County Administration  
360.740.2660  
[lara.mcrae@lewiscountywa.gov](mailto:lara.mcrae@lewiscountywa.gov)



### **Introduction**

Lewis County (COUNTY) is seeking proposals from qualified consultants/firms to guide the COUNTY with the development of a Long-Range Strategic Plan. The COUNTY anticipates that the planning process will take approximately three months to provide adequate time for participation by the County leadership team and key community stakeholders. The outcome of the process will be a written long-range strategic plan document that presents the planning process, the research, the analysis, opportunities and strategies along with an implementation plan that will guide the COUNTY for the next 10 to 25 years. Please note that this RFP requests the services of a consultant to facilitate the strategic planning process. The COUNTY is aware that there are a variety of perspectives, models, and approaches available to develop a strategic planning document; therefore, the successful firm should be able to discern which model or model(s) will best enable Lewis County to complete its long-range goals. The successful firm will be required to demonstrate its ability to meet these requirements. The COUNTY encourages any inquiries with respect to the expectations and/or scope of work sought through this proposal by email to the COUNTY – Attention Lara McRea, [lara.mcra@lewiscountywa.gov](mailto:lara.mcra@lewiscountywa.gov). All inquiries will receive a response.

A consultant/firm will be selected for this project based on criteria stated in “Evaluation of Proposals”. All proposals received by 5:00 p.m. PST on Friday, March 28, 2022 will receive full consideration.

### **RFP Process**

It is expected that one (1) consultant will be selected as a result of the RFP, although the COUNTY is under no obligation to award a contract as a result of the selection process. Based on the proposals received, the selection committee (comprised of COUNTY staff and the BOCC) will select individuals/firms to be interviewed. As a result of those interviews the top-rated consultant will be selected for contract negotiations.

### **Background**

Situated centrally between Seattle and Portland, and between the mountains and the ocean, Lewis County is a beautiful rural county with a long history. As Washington’s first county, Lewis County has deep economic and cultural roots in the timber and agriculture industries. Lewis County has nine incorporated cities/towns and over a dozen other established communities, each with their own unique identity and history.

Lewis County is a safe and proud community with good schools, a growing economy, vibrant cities, and a wealth of recreational opportunities. Hunting, fishing, hiking, biking, skiing and boating are all just a short trip in any direction here. Lewis County utilizes these natural resources in a way that creates an environment that attracts and retains those with an appreciation for its natural beauty and a sense of adventure.

Lewis County has a growing population now exceeding 80,000 and Chehalis is the County seat. Lewis County operates under the commission form of government with three Commissioners and a County Manager. Elected officials include the Assessor, Auditor, Clerk, Coroner, Sheriff, Treasurer, and Judges for District and Superior Courts.

The most recent strategic plan was a community based short-range plan, completed was for years 2020-2025. Many of the goals, objectives and initiatives have been successfully completed, achieved or engaged in some phase of implementation. Of those objectives that have not been fully realized or initiated, some could be considered no longer valid or relevant; however, consideration should be given to those elements to determine if they are carried forward into the new strategic plan or omitted all together. Additional background information on the most recent Strategic Plan can be found here:

<https://lewiscountywa.gov/offices/commissioners/lewis-county-strategic-plan-2020-2025/>

### **Scope of Services**

As envisioned, the scope of services for this proposal will include the following components.

### **Visioning**

1. The consultant(s) will facilitate a community visioning process. This process may consist of outreach and public input that could include; public meetings, stakeholder group sessions, outreach forums, online survey(s), social media, information booths at local events, discussions with COUNTY staff and other forums as determined appropriate based on a scoping process. The Consultant will conduct orientation and briefing sessions for the BOARD and elected officials and key employees to educate them on the goals of the project and the potential outcomes. The consultant must also be available for any necessary presentations to the BOARD and/or project team to include but not limited to a final strategic plan presentation.
2. Review current COUNTY information available on the COUNTY's website including department home pages, budget information, COUNTY ordinances, and other related documents and information.
3. Based on the assessment data, facilitate the revision of the Vision, Values, and Mission for the Lewis County organization.
4. Facilitate the development of long-term goals and objectives that support the Vision, Values and Mission of the Lewis County organization.
5. Submit recommendations for appropriate implementation measures and develop a system to measure the effectiveness of COUNTY activities in meeting the objectives of the long-range strategic plan. Ensure the measures are linked to the overall vision, mission and goals of the COUNTY as a whole.
6. Submit recommendations for appropriate implementation measures and develop a system to measure the effectiveness of COUNTY activities in meeting the objectives of the long-range strategic plan. Ensure the measures are linked to the overall vision, mission and goals of the COUNTY as a whole.



7. Ensure seamless alignment with the current COUNTY short-range strategic plan Vision 2025.

#### **Strategic Planning Session Preparation**

As necessary, the COUNTY envisions holding one- to two-day retreats or several shorter retreats dedicated to this effort. We seek input from consultant/firm to help structure and facilitate the event to maximize impact.

#### **Information Gathering**

During this phase, the consultant will collect data and information to become more familiar with the Lewis County. Such information may include, but should not be limited to an inventory of COUNTY resources including its finances, infrastructure, staff, opportunities, a community inventory of people, education, health care, business development, job opportunities, housing, arts, culture, heritage, history, recreation, natural features, entertainment, geography, demographics, socioeconomics and technology.

In addition, an Action Plan will be developed to define implementation steps and techniques along with a schedule of target dates to further define the goals. Benchmarks or milestones will be identified to help measure the COUNTY's success in implementing the Long-Range Strategic Plan. Development of initiatives to promote public involvement designed to engage the community, stakeholders and COUNTY leadership throughout the process is critical.

#### **Report Review**

At the end of this exercise, the consultant and the project team will draft a final plan document for review and presentation of the plan to the COUNTY. The consultant will be participating in review and refinement of this document. The BOARD, leadership team and consultant will work collectively to develop a series of implementation techniques designed to keep community members, stakeholders, business leaders, COUNTY staff and COUNTY leadership engaged in the implementation of the identified goals, objectives and initiatives of the Long-Range Strategic Plan. At a minimum, the consultant will provide the following deliverables:

1. A recommended package of material suitable for public distribution and outreach.
2. A final Long-Range Strategic Plan document that includes an implementation plan with defined milestones and benchmarks intended to measure the COUNTY's progress.
3. An executive summary of the Strategic Plan in a condensed, easy to understand, single page graphic document that can be distributed to the public and key stakeholders.

### **Proposal Submission Requirements**

1. Cover letter of interest and transmittal not to exceed one page in length.
2. Legal name of the consultant firm, address, phone, fax, and email address, year the firm was established, and type of business.
3. An organization chart indicating roles of all individuals and firms involved in this project, as appropriate. Include brief resumes for all individuals identifying their qualifications and experience. The name of the person intended to be the project coordinator for this Strategic Plan and a list of recently completed projects relevant to the scope of this RFP.
4. A clear articulation to the firm's approach to be used in this project including a proposed schedule and description of the proposed methods of public involvement.
5. A summary of qualifications, related experience and references.
6. Proposed scope of work and, project approach and plan to accomplish the work. Describe in detail your firm's project approach and methodology in managing and implementing a project of this size and scope and experience of developing and supporting the implementation of a comprehensive strategic plan. Key elements include:
  - a. Project Understanding
  - b. Project Methodology and Deliverables
  - c. Roles & Responsibilities
  - d. Project Management
7. A minimum of three (3) examples of relevant written work related to strategic planning, with no less than one example prepared on behalf of a local government organization or comparable entity. Considerable weight will be given to projects in mid-sized rural communities similar to Lewis County.
8. Fee schedule and proposed fee to accomplish the work (separate, sealed envelope marked Fee Schedule).
9. Proposals must be complete in order to be considered by the evaluation committee.



Submittals may be mailed or delivered to:  
Erik Martin, County Manager  
Lewis County  
351 NW North St.  
Chehalis, WA 98532

Applicants must submit five (5) hard copies to the COUNTY by the deadline. The submittals shall be clearly marked on the exterior to denote both the names of the submitting firm and the particular professional services contract for which the proposals are offered, "Long-Range Strategic Planning Services". For items 1-6 under Proposal Submission Requirements must be limited to ten (10) pages, front and back, in length.

All proposals should also be submitted as computer files in PDF format. Electronic files may be transferred via email to Erik Martin at [erik.martin@lewiscountywa.gov](mailto:erik.martin@lewiscountywa.gov) or provided on a portable electronic storage device. The COUNTY is not responsible for returning portable storage devices. Large files should be uploaded with a link to download files provided via email.

Lewis County is not responsible for communication errors. Applicants are advised to call the COUNTY Administration Department at 360-740-2660 to confirm that a submittal has been received.

### **Evaluation of Proposals**

Lewis County's project team will review and evaluate all properly submitted proposals that are received on or before the deadline. The project team will first review each proposal for compliance with the minimum qualifications and mandatory requirements of the RFP. Failure to comply with any mandatory requirements may disqualify a proposal. The project team shall participate in the analysis of RFPs, the interview process and the final recommendation of the selected consultant for the project. Upon successful negotiations with the selected consultant, the contract will be recommended for approval by the project team to the Board of COUNTY Commissioners for final approval.

The committee will rank proposals based on the criteria stated below:

1. Responsiveness of the Proposal to the project objectives.
2. Responding firm's experience in completing work of a similar size and scope.  
Considerable weight will be given to projects in similar sized, rural communities.
3. Specific qualifications of the primary staff who will manage, supervise, and provide services, including past experience on projects of similar size and scope.

4. Public sector experience and qualifications of the firm. This includes past project experience and/or research projects conducted for recognized industry associations.
5. Proposer's project management methodology and experience.
6. Proposer's familiarity with the strategic planning needs of the Lewis County
7. Responses of the client references.
8. Project approach and methodology.
9. Cost of services and payment policies.
10. Such other information that may be required or secured.

#### **Lewis County Rights**

Lewis County reserves the right to reject any or all proposals, make counter proposals and/or engage in negotiations with any or all firms or individuals, waive any requirements or otherwise amend this RFP, or cancel the RFP in order to achieve the COUNTY's goals and objectives for this project. Any changes in the status of the RFP will be brought to the attention of all parties that provide contact information for updates. The information contained in this RFP represent the COUNTY's best information at the time of the release of the RFP and the COUNTY reserves the right to modify any term or condition contained herein.

#### **Responsibility for Proposal Preparation**

Except as otherwise specifically agreed to in writing by the COUNTY, each consulting individual or team submitting proposals shall provide and pay for all materials, labor, transportation, charges, levies, taxes, fees or expenses incurred, including all costs to prepare a response to this RFP, travel and presentation costs, and all other services and facilities of every nature whatsoever necessary for the preparation of the RFP.

It is neither the COUNTY's responsibility nor practice to acknowledge receipt of any proposal as a result of the RFP process. It is the proposer's responsibility to assure that a proposal is delivered and received in a timely manner.

#### ***No Conflict of Interest***

No member of the Board of COUNTY Commissioners, member of the evaluation committee for this RFP, and any other officer, employee or agent of the Lewis County who exercises any functions or responsibilities in the selection of a proposal, shall have any personal interest, direct or indirect, in the project.

#### ***Open Records/Proprietary Information***

Lewis County recognizes that in responding to this RFP, the proposer may desire to provide proprietary information in order to clarify and enhance their response. To the extent permitted by law, Lewis County will keep confidential such information provided that:

1. The information submitted is arguably proprietary, and
2. The proprietary information is submitted in a separate file or section that is clearly identified as containing proprietary information, according to the submittal instructions of this RFP. Only information that is credibly propriety may be included. Inclusion of non-propriety significant information in the sealed portions may render a submittal ineligible.

Responders should note that Lewis County is a county in Washington State, and as such its files are available for public review pursuant all applicable public disclosure laws and the Washington State Open Public Meetings Act.



LEWIS COUNTY NOTICE TO CONSULTANTS FOR:

**REQUEST FOR PROPOSAL (RFP)**

**LONG-RANGE STRATEGIC PLANNING SERVICES**

Lewis County is seeking interest from consulting firms with expertise in strategic planning services to guide the county with the development of a long-range strategic plan.

Firms desiring consideration shall submit five (5) copies and one (1) electronic PDF of a complete proposal packet to Erik Martin, County Manager, 351 NW North St, Chehalis, WA 98532, by 5:00 PM local time, March 28, 2022.

The Request for Proposals and supporting documents are available for review on the Lewis County website, [www.lewiscountywa.gov](http://www.lewiscountywa.gov), or at the Lewis County Board of County Commissioners' office, 351 NW North St, Chehalis WA 98532 during regular business hours.

For more information about the project and submittal requirements contact Lara McRea at 360-740-2660 or [Lara.McRea@lewiscountywa.gov](mailto:Lara.McRea@lewiscountywa.gov) or [www.lewiscountywa.gov](http://www.lewiscountywa.gov) for an information packet.

Lewis County is an equal opportunity and affirmative action employer.

DATED this 8<sup>th</sup> day of March, 2022.



Clerk of the Board of County Commissioners  
Lewis County, WA



PUBLISH: The Chronicle – March 8 and March 15, 2022  
Daily Journal of Commerce (Seattle) March 9, March 12 and March 16, 2022  
Daily Journal of Commerce (Portland) March 9, March 11 and March 16, 2022  
Lewis County Web Site @[www.lewiscountywa.gov](http://www.lewiscountywa.gov)

# BOCC AGENDA ITEM SUMMARY

**Resolution:**

**BOCC Meeting Date:** March 8, 2022

**Suggested Wording for Agenda Item:**

**Agenda Type:** Legal Notice

Issuing a Request for Proposals (RFP) for Long-Range Strategic Planning Services for Lewis County

**Contact:** Erik Martin

**Phone:** 3607402697

**Department:** BOCC - Board of County Commissioners

## Description:

A Request for Proposals (RFP) is to be issued to retain a qualified professional consultant for strategic planning services to guide the county with the development of a long-range strategic plan

## Approvals:

User	Status
PA's Office	Pending

## Publication Requirements:

### Publications:

The Chronicle, The Seattle Daily Journal of Commerce, the Portland Daily Journal of Commerce

**Additional Copies:**

**Cover Letter To:**