

**REQUEST FOR QUALIFICATIONS  
FOR GENERAL CONSULTING SERVICES**

*Issued by*



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## **INTRODUCTION**

This is an invitation to urban public finance and economic development consultants to present to the Northwest Indiana Regional Development Authority (RDA) a request for qualifications for professional services to the operation of the Regional Development Authority.

## **OVERVIEW OF THE REQUEST PROCESS**

The RDA will accept until **4:30 p.m. CST on May 15, 2009**, requests for qualifications from firms interested in providing professional services to the RDA. The work described below would commence on August 22, 2009.

The work will require familiarity with Northwest Indiana's economy, its transportation systems, environmental conditions, and the comprehensive economic development strategies currently being pursued by the RDA. Further, professional services will entail significant due diligence but are not limited to:

### **Due Diligence/Technical Assistance**

- Provide strategic targeted investment and project-specific research and analysis of master plans, critical path issues, market forces, funding requirements, and alternative investment and development scenarios over the development horizon
- Provide leadership through the engagement of and/or provide the guidance on the use of technical, highly-specialized experts – from the engineering, environmental, transportation and financial investment fields – at the earliest opportunity or upon the request of the RDA to ensure the vision of the proposed project as encompassed in the RDA's Comprehensive Strategic Plan
- Meet and interact with municipal representatives, project managers, contractors and sub contractors on a periodic basis to ensure the RDA Board of progress and accountability of each project undertaken
- Objectively review, interact and present the due diligence work of the RDA to the board, staff, grantees, elected officials and other stakeholders to regional development
- Prepare due diligence/technical assistance memoranda, reports and other presentation materials on the behalf of the RDA as necessary
- Provide the RDA Board with critical path information to ensure that projects are being accomplished within a prescribed time line and within a

planned budget and regularly updated descriptions of project parameters and schedules

- Monitor environmental issues and impact upon all projects, as needed, that currently are or have the potential to be funded by the RDA to ensure compliance with state and federal environmental laws and regulations

#### Financial Analysis and Advisory Services

- Assist in preparing updates to the RDA Comprehensive Strategic Plan to be presented from time to time to the State Budget Committee, the Office of Management and Budget, and other state agencies as required
- Provide the RDA Board with critical information regarding the cost benefit of a proposed project; ultimate cost of the project; potential for federal, state, or private sector funding, including public-private partnership opportunities, where they may exist
- Monitor both RDA and other funding sources to ensure the leveraging of funds and the availability of those funds when needed for projects funded by the RDA
- Coordinate with RDA staff and its consultants on pertinent matters concerning the RDA's accounting functions and auditing requirements, including the release of funds and any necessary responses to reported findings
- Evaluate with the Indiana Finance Authority the potential of selling bonds or engaging in other funding arrangements to further current projects and projects that may be proposed in the future
- Undertake any other project deemed necessary by the RDA within the consultant's area of expertise

#### Operations Management/Project Management

- Assist the RDA on all aspects of its operations and organizational development as requested by the RDA Board and under the direction of the Executive Director
- Assist the RDA, the applicants and its grantees throughout the process for the funding of projects from the application stage, project scope review to grant administration
- Assist in the preparation and execution of grant agreements
- Effectively monitor the financial and project status of all grants against the terms of the RDA grant agreements and track the overall development progress of the four targeted investments

- Coordinate multi-phased, cross-jurisdictional projects between the RDA and each of the four targeted investments' or project-specific stakeholders
- Effectively assess and communicate strategic issues, such as fiscal, policy and regulatory implications that may affect a RDA-funded project(s)
- Proactively identify operational or project issues that may affect the RDA's performance or development agenda
- Assist in the preparation and the staffing of full board and working group agendas and presentation materials on a monthly basis
- Coordinate and interact with the RDA Board, staff and consultant teams by email, phone and in person as appropriate

**All responses to or questions regarding this request should be submitted in writing to:**

William Hanna, Executive Director  
Northwest Indiana Regional Development Authority  
9800 Connecticut Drive  
Crown Point, Indiana 46307

**and be clearly marked "RDA RFQ Professional Services". The RDA will accept until 4:30 p.m. CST on Friday, May 15, 2009.**

### **BACKGROUND**

The Northwest Indiana Regional Development Authority (RDA) was created by the Indiana General Assembly in 2005. The Authority is a multi-purpose, area-wide planning and regional development organization responsible for development within Lake and Porter Counties in Indiana. It is governed by a board of seven members appointed by the Mayors of Gary, Hammond, and East Chicago; the County governments of Lake and Porter Counties; and the Governor of Indiana.

The mission of the RDA is to be a catalyst for the transformational advances in Northwest Indiana. We are guided by a set of principles directing us to be bold in our thinking; collaborative as we work with many groups and organization without regard to political affiliation, race, or social status; transparent to instill public confidence as we do our work; non-partisan as we reach out to all constituents; efficient in our use of the public's resources; accountable for prudent actions, now and in the future; and socially equitable in the way we conduct our business internally and externally that respects the diversity of the region we serve. This vision and these principles are very important to the

RDA and will be embodied into the decision-making framework during the awarding of this contract.

The General Services Consultant will be expected to comply with I.C. 36-7.5-2-8, which states that the RDA shall:

“(b) In addition to the provisions of subsection (a), with respect to projects undertaken by the authority, the authority shall set a goal for participation by minority business enterprises of fifteen percent (15%) and women’s business enterprises of five percent (5%), consistent with the goals of delivery the project on time and within the budgeted amount and, insofar as possible, using Indiana businesses for employees, goods and services. In fulfilling the goal, the authority shall take into account historical precedents in the same market. *As added by P.L. 215-2005, SEC. 73.*

### **OVERVIEW OF THE REQUEST PROCESS**

The proposed timeline for this RFQ process is as follows and may be subject to change.

April 1, 2009	RFQ Released to Public and Posted to Web-site
May 15, 2009	RFQ Proposals Due to the RDA Office
May 30, 2009	RDA Executive Director Completes Initial Review of Proposals and the Qualified Firms are Scheduled for Interviews
June 11, 2009	RDA Board Deliberates and Makes Recommendation for the General Services Consultant
June 23, 2009	RDA Board Votes on the Recommendation for General Services Consultant
July 2009	RDA General Consultant Contract Transition
August 2009	RDA General Consultant Services Begins

### **FORMAT AND SUBMISSION OF QUALIFICATIONS**

The qualifications should include the following information:

- 1) The name and address of the submitting organization and the state in which it is incorporated or chiefly located; a designated contact within the organization and a telephone, fax number, and e-mail address; a list of any proposed sub-consultants that may be used on this project along with the state in which such sub-consultants are incorporated or chiefly located and their designated contacts and phone numbers. If sub-consultants are to be used, a primary contact/project manager

must be specified. The division of labor and area(s) of responsibility for the consultant and sub-consultant must also be specified.

- 2) A description of available personnel and other critical resources.
- 3) Identification and resumes of the project manager and the key technical personnel who will be conducting the work on the project.
- 4) The designated roles and duties with projected time allotted per week on this project for each consultant and sub-consultant must also be specified. The estimated cost for the work proposed.
- 5) References for similar projects completed by your firm, including the name, address, and telephone number of the client/contact person and a description of the work.
- 6) A copy of the ethics code to which the submitting organization subscribes.
- 7) With respect to projects undertaken by the authority, the awardee shall set a goal for participation by minority business enterprises of fifteen percent (15%) and women's business enterprises of five percent (5%), consistent with the goals of delivering the project on time and within the budgeted amount and, insofar as possible, using Indiana businesses for employees, goods, and services. In fulfilling the goal, the awardee shall take into account historical precedents in the same market. The complete citation can be found in IC 36-7.5-2-8(b).
- 8) One hard copy and an electronic file on cd or thumb drive are needed. Packets received after the deadline will be rejected.

#### **REVIEW AND EVALUATION**

The Working Group will review and evaluate the qualifications based on, but not necessarily limited to, the completeness and clarity of the packet submitted, past experience in similar projects by firms and their staff members assigned to this project, qualifications and availability of key personnel to participate in the project, and the fees involved in this submittal.

#### **COST OF PREPARATION**

The RDA is not liable for any cost incurred prior to issuance of a contract.

**GENERAL RFQ DISCLOSURES**

- 1) Requirements and specifications of this proposal are considered to be the minimum needed.
- 2) If any modifications are made to the Regional Development Authority's request, anyone who has requested the original RFQ will be sent copies of said modifications.
- 3) The responder must follow all RFQ instructions to be considered responsive.
- 4) The RDA has the sole discretion to award this contract and reserves the right to modify or withdraw any and all offers.
- 5) The RDA reserves the right to reject all of the proposals.
- 6) The RDA reserves the right to interview, negotiate and deliberate with candidates before making a final decision.