

Regional Rural Revitalization (R3)
Strategies

Request for Proposals for Executive Director
Services

7-27-2023

Introduction

R3 Strategies seeks the services of a firm or an individual to serve as the organization's executive director.

In October of 2021, the cities of John Day, Burns and Lakeview signed a memorandum of understanding to explore ways the cities could collaborate to stimulate economic development in their respective communities. After a series of discussions, the cities decided to establish an intergovernmental entity to combine and share resources to achieve greater efficiencies and economies of scale to execute economic development and public improvement projects.

The new entity is called Regional Rural Revitalization (R3) Strategies to recognize its role in catalyzing regional economic recovery. It is organized under Oregon Revised Statutes 190.010, which allows units of local government in Oregon to enter into agreements for the performance of any functions and activities that any party to the agreement, or its officers or agents, has the authority to perform. It commenced operations on July 1, 2023, and the current member cities of R# are John Day, Burns, Lakeview and Baker City.

R3 Strategies Overview

R3 Strategies is a unique intergovernmental entity. With a focus on civic entrepreneurship and rural innovation, R3 will act as a broker or intermediary between rural public sector agencies and private equity investors. R3 aims to achieve greater economies of scale and increased economic gains for its member cities by pooling public assets across multiple jurisdictions, facilitating public-private partnerships, and managing complex community development and capital improvement projects through a single intergovernmental agency.

R3 Strategies will equip small cities and rural local governments to "hunt as a pack" by providing asset management services that pool human capital, capital equipment, and financing across multiple jurisdictions.

R3 will seek to leverage public investments for these purposes. Initially, R3 has been seeded with \$11.5 million from the state of Oregon and the federal government. The state money is intended to be used to provide planning, infrastructure, capital equipment and predevelopment costs for housing, to award grants and loans to capacity builders and developers of housing and to enter into public-private partnerships for the development of housing. Initial projects planned by the R3 member cities are outlined in schedule 5.9 of the IGA creating the entity, which is attached as an exhibit to this document.

Description of Qualifications and Experience

The executive director will be responsible for providing policy guidance and making recommendations to the R3 Strategies Board of Directors. The director will also implement the board's policies and manage the day-to-day affairs of the organization. Specific duties of the Executive Director will be assigned by the Board but are generally outlined in Schedule 4.2.2 of the IGA, which is attached as an exhibit.

R3 seeks an executive director with excellent communication skills and prior experience working in the public sector. The ideal contractor will have the following qualifications and experience:

- Has held similar positions as a chief executive of an Oregon local government, ideally for an ORS 190 intergovernmental entity;
- Experience in land use planning as a planning director or chief planning official;
- Specific experience with developing housing in Oregon;
- Experience with economic or regional development, ideally in a rural setting;
- Experience with grant administration for public entities or not-for-profit organizations;
- Experience with real property transactions in Oregon (property purchases/sales, property line adjustments, etc.);
- Experience with program design and evaluation to assist the board in determining how to create and manage their grant and loan programs; and
- Familiarity with public sector finance and financial instruments.

Submission of a Proposal

Interested parties must submit a proposal in order to be considered. Proposals must provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP, and should be easily reproducible. Emphasis should be on completeness and clarity of content of the proposal.

Proposals must not exceed twenty (20) pages, with the exception of the cover letter and resumes, which will not count against the page limit.

The deadline for submission of proposals is 3:00 pm, Friday, [insert date].

Review and interviews, if any, will be held [insert starting date] through [insert ending date].

Selection and agreement negotiation is expected to occur from [insert starting date] through [insert ending date], with the R3 Board award of personal services contract on [insert date].

Proposal Form and Content

Proposals must include the following items, all of which must fall within the maximum page count. Proposals, including the cost schedule, will remain open offers that bind the proposer for sixty (60) days following the proposal due date.

- Cover Letter. Proposals must include a cover letter addressed to City of Burns Interim City Manager: Judy Irwin: jerwin@cityofburnsor.gov, and signed by an official legally authorized to bind the proposer to both its proposal and cost schedule. The cover letter must include name, title, address, email address and telephone number of the proposer submitting the proposal and name, title, address, email address and telephone number of other persons, if any, who are authorized to represent the proposer.

- Executive Summary. Proposers must summarize the key provisions of their proposal in this section. In this section, proposers must also describe why they are qualified to provide the services described in this RFP.
- Description of Qualifications and Experience. Based on the qualifications and experience R3 seeks, as listed in the section above, please describe the following:
 - The prior positions you have held in Oregon local government. Provide the name of the entities, along with the dates and duration of your employment;
 - Your experience in land use planning as a planning director or lead planning official. Provide the name of the entities, along with the dates and duration of your employment or engagement;
 - Your experience in the development of housing in Oregon. Provide the number of applications, the types (subdivision, PUD, multifamily, etc.) and the dates related to each;
 - Examples of your experience with economic development, ideally in a rural setting;
 - Your experience administering or seeking grant funding, with examples of each;
 - The types of real property transactions you have worked on, with examples of each;
 - Your experience with program design and program evaluation for public agencies; and
 - Your experience in public sector finance, ideally including experience as a budget officer for an Oregon local government.
- References. Provide the contact information for at least three references, ideally from local government entities for whom you previously worked.
- Fee and Cost Schedule. Please provide your proposed fee and cost schedule for the services, including an hourly rate for employees and any out-of-pocket costs and their rates.

[End of BEH draft; board will need to consider evaluation process, deadlines, etc., which we will fold into next section of RFP; will add other “boilerplate” provisions at the end; will board want to include a proposed form of contract?]

For example:

Evaluation Criteria. The following information will be taken into consideration during the evaluation process.

- Qualifications identified in the proposals.

- Complete and clear responses to items in the Proposal Form and Content section.
- Range of services offered and available support staff.
- Demonstration of workload capacity commensurate with the level of service required by R3.
- Professional reputation for providing high-quality services, ability to work cooperatively with boards, developers, business partners and other government entities.
- Demonstration of sound judgment, integrity and reliability as determined by the references provided.
- Cost of providing services as per the submitted retainer or hourly rate schedule. Please note that while proposed fees are a significant factor in determining the successful proposer, they are balanced against criteria specified in this section.

Clarifications. R3 reserves the right to seek clarification of each proposal submitted. R3 also reserves the right to require other evidence of technical, managerial, financial, or other abilities prior to selection.

The successful individual(s) or firm(s) will be the one that in the judgment of the R3 Board best demonstrates the ability to cover the broadest range of services in the most cost-effective manner. If the Board has satisfied the prerequisites of ORS 192.660(2)(a), the council may review proposals and conduct interviews with finalists in executive session pursuant to ORS 192.660(2)(a). No final decision will be made in executive session. Upon completion of the evaluation process, a member designated by the Board will advise the proposers of the selection and negotiate the appropriate agreement(s). The agreement(s) will define the extent of services to be rendered, method and amount of compensation. The Board reserves the right to negotiate a final contract that is in the best interest of R3. The proposal will become a part of the agreement. The executive director serves at the pleasure of the Board. The contract may be terminated at any time by the Board. Once a tentative agreement is prepared, it will be presented to the Board to award the personal services contract.

NOTICE/RESERVATION OF RIGHTS

In addition to all other rights granted to it under Oregon law, R3 reserves the right to waive formalities in the proposal process; to accept or reject any or all proposals received as a result of this request; to request additional information concerning any proposal; to accept or negotiate modifications to any proposal; to negotiate with qualified individuals/firms; to interview any proposer; to cancel, in part or in its entirety, the request for proposals; or to waive any irregularities in any proposal following the proposal submission deadline date in order to serve the best interests of R3. R3 also reserves the right to negotiate separately with any proposer whatsoever, in any manner necessary to serve the best interests of R3. This request for proposals does not commit the R3 to pay any costs incurred in the preparation of a proposal. All inquiries regarding this Request for Proposals should be directed to: City of Burns Interim City Manager: Judy Irwin: jerwin@cityofburnsor.gov.