



## REQUEST FOR PROPOSAL

### **Consultant Services for Development of 5-Year Comprehensive Economic Development Strategy for the Hudson Valley Regional Council Economic Development District**

**Submit RFP Via Email To:**

Carla Castillo  
Executive Director  
[ccastillo@hudsonvalleyrc.org](mailto:ccastillo@hudsonvalleyrc.org)

Caleb Fine  
Economic Resilience Coordinator  
[cfine@hudsonvalleyrc.org](mailto:cfine@hudsonvalleyrc.org)

**RFP Submittal Deadline: 10:00 AM (EST), March 28, 2025**

Hudson Valley Regional Council  
105 Ann Street #2  
Newburgh, NY 12550  
(845) 564-4075  
<https://hudsonvalleyregionalcouncil.org/>

The Hudson Valley Regional Council reserves the right to reject any and all proposals.

# RFP for 5-Year CEDS Plan for HVRC EDD

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## I. INTENT

The Hudson Valley Regional Council (HVRC) seeks proposals to provide consultant services for the development of the HVRC Economic Development District (EDD) 5-Year Comprehensive Economic Development Strategy (CEDS) Plan (Project). The HVRC EDD CEDS Plan is funded by a Partnership Planning Assistance Grant from the US Department of Commerce Economic Development Administration (EDA). HVRC's Request for Proposals (RFP) seeks to select a Consultant to conduct stakeholder engagement, conduct specific lines of research, and draft the CEDS Plan. Responsive Consultant will be available to complete the CEDS Plan by Friday, June 27, 2025; schedule details outlined in IV. Project Schedule.

As an EDA-funded CEDS, the final product must meet the EDA's basic CEDS requirements. Current EDA guidelines for the development of CEDS plans are available on the [EDA's CEDS website](#) as well as [020625 guidelines recommendations document](#). Per regulations governing the CEDS (13 CFR § 303.7), the following sections must be included in the HVRC EDD CEDS Plan:

- **Summary Background**: A summary background of the economic development conditions of the Mid-Hudson Region.
- **SWOT Analysis**: An in-depth analysis of regional strengths, weaknesses, opportunities and threats. (More applicable analysis frameworks may include SOAR or NOISE.)
- **Strategic Direction/Action Plan**: Strategic direction and action plan, flowing from SWOT analysis, consistent with other relevant state/regional/local plans.
- **Evaluation Framework**: Performance measures used to evaluate organization's implementation of CEDS and impact on regional economy.
- **Economic Resilience**: Planning for and implementing resilience, establishing information networks, pre-disaster recovery planning, measuring resilience.
- **Workforce Development**: Workforce development efforts as an essential underpinning of the broader economic development strategy, including employer-driven, place-based efforts.

HVRC will procure consultant services in accordance with the established policy of HVRC and requirements of the EDA terms and conditions. The Project will commence upon selection of a Consultant and issuance of a notice to proceed on or about April 11, 2025.

## II. BACKGROUND INFORMATION

### A. Hudson Valley Regional Council

The Hudson Valley Regional Council was established in 1977 as an organization of county governments in the Mid-Hudson Region, comprising Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, and Westchester counties. HVRC is funded by Federal and State grant programs as well as contracted work with local governments and annual contributions from member counties.

HVRC receives grant funding from the EDA through its Partnership Planning Assistance Program. This funding requires the development of a CEDS Plan for the Region on a five year

cycle, with annual updates in between. HVRC assists municipalities and eligible entities throughout the Region with the application process for the EDA’s various grant offerings.

## B. CEDS

Guiding elements important to the development of CEDS plans are bulleted below (from the EDA’s [CEDS Content Guidelines: Recommendations for Creating an Impactful CEDS](#)). FEMA’s 2022 [Comprehensive Economic Development Strategy and Hazard Mitigation Plan Alignment Guide](#) may serve as an additional guiding document.

- The “CEDS provides the capacity-building foundation by which the public sector, working in conjunction with other economic actors (individuals, firms, industries), creates the environment for regional economic prosperity.”
- “[C]apacity building” refer[s] to the public sector’s role in investing in new ideas, knowledge transfer, and infrastructure to build a foundation so that the private sector can flourish (i.e., enable economic development to promote regional prosperity).”
- “A CEDS should be developed with broad based community participation and result in a document that is readily accessible to regional stakeholders. Potential partners for developing a CEDS could include government agencies, private sector interests, education providers, non-profits, community and labor groups, workforce boards, utilities, etc. Stakeholders should be able to use it as a guide to understanding the regional economy and to take action to improve it.”

The EDA’s current [Investment Priorities](#) are bulleted below for reference. The Investment Priorities guide EDA funding decisions nation-wide.

- 1) **Critical Infrastructure**: Economic development planning or implementation projects that support development of public facilities, including basic public infrastructure, transportation infrastructure, or telecommunications infrastructure.
- 2) **Workforce**: Economic Development planning or implementation projects that –
  - a. Support job skills training to meet the hiring needs of the area in which the project is to be carried out and that result in well-paying jobs; or
  - b. Otherwise promote labor force participation.
- 3) **Innovation and Entrepreneurship**: Economic development planning or implementation projects that –
  - a. Support the development of innovation and entrepreneurship-related infrastructure;
  - b. Promote business development and lending; or
  - c. Foster the commercialization of new technologies that are creating technology-driven businesses and high-skilled, well-paying jobs of the future.
- 4) **Economic Recovery Resilience**: Economic development planning or implementation projects that enhance the ability of an area to withstand and recover from adverse short-term or long-term changes in economic conditions, including effects from industry contractions or economic impacts from natural disasters.
- 5) **Manufacturing**: Economic development planning or implementation projects that encourage job creation, business expansion, technology and capital upgrades, and productivity growth in manufacturing, including efforts that contribute to the competitiveness and growth of domestic suppliers or the domestic production of innovative, high-value products and production technologies.

## III. SCOPE OF WORK

### A. Scope of Work Background

The Scope of Work (Scope) combines HVRC’s internal staff capacity and expertise as well as Consultant expertise. The below outlined Scope permits for submission of the HVRC EDD Draft CEDS Plan to the EDA in the required timeframe, by June 27, 2025. HVRC’s role in each Scope task is presented where applicable. Consultant can expect to complete the entirety of a Scope task where HVRC is not mentioned. Efficient completion of Scope tasks between Consultant and HVRC staff shall be ensured through weekly meetings.

Respondents to this RFP will represent a firm, company, team, or individual possessing experience and expertise in preparing CEDS plans, conducting data analysis, conducting strategic planning, conducting focus groups, and the professional standards thereof, to undertake and successfully complete the Scope outlined in this RFP. Respondents should be prepared to demonstrate a strong economic development strategic planning background and be able to undertake a planning process involving the seven Mid-Hudson counties, resulting in a CEDS Plan acceptable to the EDA and applicable to the Mid-Hudson’s context.

### B. Scope of Work

The following is a description of Project tasks to be undertaken by the selected Consultant. HVRC’s role is presented where applicable. Consultant can expect to complete the entirety of a Scope task where HVRC is not mentioned.

#### **Task 1. Review existing plans and reports**

HVRC has identified reports and plans related to economic development, demographic trends, transportation, and other relevant topics, listed below in Regional Documents and County Documents. Completion of this task is anticipated as follows:

- HVRC shall make available to Consultant a summary of key trends, goals, objectives, and actions from existing plans and reports.
- Consultant will identify, as appropriate, any additional existing plans and reports relevant and critical to this Project and summarize their key trends, goals, objectives, and actions.

#### REGIONAL DOCUMENTS

- Hudson Valley Regional Council (2019): [2019-2023 5-Year CEDS](#)
- Hudson Valley Regional Council (2022): [Towards a Regional Resiliency Network](#)
- Hudson Valley Regional Council (2021): [US DOC EDA Distress Criteria in the Mid-Hudson Region](#)
- Mid-Hudson Regional Economic Development Council: [State of the Region: Mid-Hudson 2023 Strategic Plan](#)
- Regional Plan Association: [Impact Analysis of Housing Undersupply on the Tri-State Region](#)
- New York Metropolitan Transportation Council (2021): [Regional Transportation Plan](#)
- American Society of Civil Engineers, NYS Council (2022): [Report Card for New York Infrastructure](#)

- Pattern for Progress (2024): [Local Zoning, Regional Needs](#)
- Office of the New York State Comptroller (2024): [Performance of Industrial Development Agencies in New York State](#)
- Office of the New York State Comptroller (2024): [New York State Business Owners](#)
- UHY / Siena College Research Institute / HVEDC: [18<sup>th</sup> Annual Upstate New York Business Leader Survey](#)
- Orange & Rockland (2025): [Climate Change Resilience Plan](#)
- Central Hudson Gas & Electric (2024): [Climate Change Resilience Plan](#)
- Mid-Hudson Planning Consortium (2013): [Mid-Hudson Regional Sustainability Plan](#)

## COUNTY DOCUMENTS

- Dutchess, Orange, & Ulster Counties (2021): [Connect Mid-Hudson Transit Study](#)
- Dutchess, Orange, & Ulster Counties: [Mid-Hudson Valley Transportation Management Area](#)
- Dutchess County: [Dutchess County Economic Development](#)
- Orange County (2015): [Orange County Economic Development Strategy](#)
- Orange County (2023): [Orange County Climate Resiliency Plan](#)
- Rockland County: [Rockland County Economic Development](#)
- Sullivan County: [Sullivan County Economic Data](#)
- Sullivan County: [Hazard Mitigation Plan](#)
- Ulster County (2020): [Building a People Centered Economy](#)
- Westchester County (2024): [Local Government Operations Climate Action Plan](#)

## **Task 2. Update analysis of economic development conditions of region**

A clear presentation of the local economic situation of a region, as revealed by an analysis of current data, is a prerequisite for stakeholder engagement and CEDS plan development.

- a) Demographic and socioeconomic
- b) Environmental, geographic, climatic, and cultural
- c) Emerging or declining clusters or industry sectors
- d) Infrastructure assets related to economic development (e.g., water, sewer, telecommunications/broadband, energy distribution systems, transportation modes, etc.)
- e) Relationship of Region's economy to other relevant geographic areas
- f) Factors directly affecting economic performance (e.g., workforce issues; innovation assets; industry supply chains; state and local laws; financial resources; transportation systems; energy costs; business, personal, and property taxes; bonding capacity; land use patterns)
- g) Other factors related to economic performance (e.g., housing; health services; educational, cultural and recreational resources; and public safety)

Completion of this task is anticipated as noted below. To the extent possible, work on this task should be built on existing reports and analyses.

- HVRC staff shall collect and analyze data a) – e), including the preparation of relevant charts. Prior to HVRC's development of an accompanying chart narrative, Consultant

shall conduct a quality and formatting check on the data and charts, providing guidance for any requested updates or direction on collection of any additional data.

- Consultant shall collect and analyze data f) and g), including the preparation of relevant charts and narrative.

### **Task 3. Prepare strategic analysis**

A strategic analysis of the HVRC EDD should identify the Region's unique assets and competitive positioning as well as limiting factors and limitations. Using relevant data and background information developed under Task 2, Consultant will identify the internal and external factors that influence the Region's competitive positioning. Consultant will use an applicable strategic analysis framework, such as SWOT / SOAR / NOISE.

### **Task 4. Engage stakeholders**

Stakeholder engagement will both collect data and inform the development of the CEDS strategic direction and action plan. As noted earlier, regional stakeholders are both inputs to the CEDS Plan and end users. Research conducted and data collected as part of the preceding tasks will serve as the foundation for stakeholder conversations. The below-proposed task structure allows for completion of this task within the required timeframe.

Completion of this task is anticipated as noted below.

- a) HVRC will compile a listing of relevant stakeholders; develop groupings for stakeholder engagement; categorize stakeholders by engagement approaches (i.e., survey, focus group, etc.); and identify engagement order.
- b) Consultant will review items in bullet a) and work with HVRC to finalize listing, groupings, and engagement approach. Consultant shall add key relevant stakeholders as needed.
- c) HVRC will draft stakeholder questions for survey / focus groups. Consultant will review and provide feedback / edits to stakeholder questions.
- d) HVRC will create survey instrument, disseminate, manage survey completion reminders, and analyze responses and prepare results in chart and narrative formats. Consultant will review charts and narrative and provide feedback / edits.
- e) HVRC will schedule focus groups. Consultant will conduct all focus groups unless the number of focus groups requires additional support from HVRC. HVRC will provide support for focus groups, including notetaking and preparation of summary reports.

### **Task 5. Develop draft CEDS plan**

Consultant shall prepare final draft of CEDS Plan for dissemination for public input, informed by content obtained as part of Tasks 1-4. The Plan should recognize the complex interconnections that are intrinsic to long-term economic prosperity. The Plan shall be prepared in Word, with the final draft fully formatted for public distribution and with inclusion of all relevant charts in the main body of the Plan. The Plan should be an attractive, engaging, and accessible document that outlines a clear approach to long-term economic prosperity. The CEDS Plan sections are listed below. Hyperlinks to the EDA CEDS guideline webpages are provided for additional guidance.

- [Summary of Background](#): A summary background of the economic development conditions of the region.
- [SWOT Analysis](#): An in-depth analysis of regional strengths, weaknesses, opportunities and threats. Alternative strategic analyses may be used, e.g., SOAR, NOISE.

- Strategic Direction/Action Plan: Strategic direction and action plan, flowing from strategic analysis, consistent with other relevant State/regional/local plans. Strategic direction should include vision and goals. Action plan should identify stakeholder(s) responsible for implementation, timetables, and opportunities for integrated use of local, State, and Federal funds. Action plan should be actionable, specific, and focused, with an emphasis on building upon the Region's assets that hold the greatest promise for long-term economic prosperity.
- Evaluation Framework: Performance measures used to evaluate HVRC's implementation of CEDS and impact on regional economy.
- Economic Resilience: Planning for and implementing resilience, establishing information networks, pre-disaster recovery planning, measuring resilience.
- Workforce Development: Workforce development efforts as an essential underpinning of the broader economic development strategy, such as employer-driven, place-based workforce development.
- Appendices: Comprised of additional data charts and narratives as well as additional information collected as part of the CEDS development process, as applicable. The appendices shall be jointly developed by Consultant and HVRC, generally following the responsibilities outlined in earlier Tasks.

HVRC shall conduct an internal review of Draft CEDS sections as they are completed by Consultant, providing feedback and edits as needed in the Word document in Track Changes mode. HVRC shall complete an internal review of the fully completed Draft CEDS prior to dissemination for public input, also in the Word document in Track Changes mode. Consultant shall make every effort to ensure version control. Consultant shall be given access to HVRC Teams site for Project, which will house all materials for the Project. Consultant may request alternative sharing platforms if certain materials will not seamlessly interface with Teams.

## C. Deliverables

The expected output of Consultant's services will be a thoroughly investigated and considered Draft CEDS Plan, with all elements completed. This includes the required sections listed in Task 5 above. The Draft CEDS Plan will be delivered in Word to enable HVRC's incorporation of any public input for preparation of the Final CEDS Plan for HVRC Board adoption.



# IV. SUMMARY OF KEY DATES: PROCUREMENT & PROJECT SCHEDULES

The schedule below highlights key dates for both Consultant procurement and Project timeframe. A more detailed week by week timeline is also included as HVRC EDD 2025-2029 CEDS Plan Completion Timeline.

Action Item	Timeline
RFP Release Date	Friday, March 7, 2025
RFP Questions Submission Deadline	12:00pm, Monday, March 17
Responses to RFP Questions Posted	5:00pm, Tuesday, March 18
Proposals Due	10:00am, Friday, March 28
Consultant Selection & Contract Execution	week of April 7
Project Kick-off Meeting	Monday, April 14
Stakeholder Engagement Period	week of May 12 thru week of May 26
Completed Draft CEDS Plan, for Public Comment	Friday, June 27

HVRC EDD 2025-2029 CEDS Plan Completion Timeline			Week of Task Completion																												
Area	Tasks & Sub-tasks	Responsible	1/6	2/24	3/3	3/10	3/17	3/24	3/31	4/7	4/14	4/21	4/28	5/5	5/12	5/19	5/26	6/2	6/9	6/16	6/23	6/30	7/7	7/14	7/21	7/28	8/4	8/11	9/15		
Consultant Selection	<b>Review RFP Responses</b>	HVRC																													
	RFP closes																														
	Internal eligibility review																														
	Scoring Committee review																														
	<b>Respondent Interviews</b>	HVRC & Respondent																													
	<b>Consultant Selection</b>	HVRC																													
<b>Consulting Contract Execution</b>	HVRC & Consultant																														
<b>Project Kick-off</b>	HVRC & Consultant																														
Data Collection	<b>Task 1. Review Existing Plans &amp; Reports</b>																														
	Prepare summaries & graphic representation	HVRC																													
	Review summaries / graphics and provide feedback / edits	Consultant																													
	Incorporate feedback / edits	HVRC																													
	Prepare summaries & graphic representation for any additional plans & reports	Consultant																													
	<b>Task 2. Update Analysis of Economic Development Conditions of Region</b>																														
	Identify & finalize data points to be researched	HVRC																													
	Tabulate data and prepare charts: a) - e)	HVRC																													
	Review data / charts and provide feedback / edits: a) - e)	Consultant																													
	Tabulate data and prepare chart: f) - g)	Consultant																													
	Review data / charts and provide feedback: f) - g)	HVRC																													
	Incorporate feedback / edits and prepare narrative: a) - g)	HVRC & Consultant																													
	<b>Task 2.1. Review and Analyze Mid-Hudson Counties Projects</b>																														
	Obtain balance of responses	HVRC																													
	Finalize data spreadsheet and develop charts																														
	Finalize narrative																														
	<b>Task 3. Prepare Strategic Analysis</b>	Consultant																													
	<b>Task 4. Engage Stakeholders</b>																														
	Compile initial stakeholder contact list, develop groupings for stakeholder engagement, categorize stakeholders by engagement approaches, identify engagement order	HVRC																													
	Review above items, add key relevant stakeholders, finalizing listing / groupings / engagement approach	Consultant																													
	Schedule focus groups: HVRC Board members	HVRC																													
	Schedule focus groups: non-HVRC Board members	HVRC																													
	Draft stakeholder questions for survey / focus groups	HVRC																													
Review and provide feedback / edits to stakeholder questions	Consultant																														
Create survey instrument and disseminate	HVRC																														
Reminder emails for survey completion	HVRC																														

HVRC EDD 2025-2029 CEDS Plan Completion Timeline			Week of Task Completion																												
Area	Tasks & Sub-tasks	Responsible	1/6	2/24	3/3	3/10	3/17	3/24	3/31	4/7	4/14	4/21	4/28	5/5	5/12	5/19	5/26	6/2	6/9	6/16	6/23	6/30	7/7	7/14	7/21	7/28	8/4	8/11	9/15		
	Survey closes	HVRC																													
	Survey results analyzed, results prepared in chart and narrative formats	HVRC																													
	Review and provide feedback / edits to survey charts and narrative	Consultant																													
	Conduct virtual focus groups: non-HVRC Board members	Consultant																													
	Document focus groups and prepare summary: non-HVRC Board members	HVRC																													
	Conduct in-person focus groups: HVRC Board members	Consultant																													
	Document focus groups and prepare summary: HVRC Board members	HVRC																													
<b>Draft CEDS Plan</b>	<b>Task 5. Develop Draft CEDS Plan</b>																														
	<a href="#">Section: Summary of Background</a>	Consultant																													
	<a href="#">Section: SWOT Analysis</a>	Consultant																													
	<a href="#">Section: Strategic Direction/Action Plan</a>	Consultant																													
	<a href="#">Section: Evaluation Framework</a>	Consultant																													
	<a href="#">Section: Economic Resilience</a>	Consultant																													
	<a href="#">Section: Workforce Development</a>	Consultant																													
	Section: Appendices	HVRC & Consultant																													
	<b>Review of Draft CEDS Sections</b>																														
	Internal review	HVRC																													
	Edits to Draft CEDS based on internal review	Consultant																													
	<b>Review of Draft CEDS Plan</b>																														
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HVRC EDD 2025-2029 CEDS Plan Completion Timeline			Week of Task Completion																												
Area	Tasks & Sub-tasks	Responsible	1/6	2/24	3/3	3/10	3/17	3/24	3/31	4/7	4/14	4/21	4/28	5/5	5/12	5/19	5/26	6/2	6/9	6/16	6/23	6/30	7/7	7/14	7/21	7/28	8/4	8/11	9/15		
2025-2029 CEDS Adoption	<b>Board Resolution</b>	HVRC																													
	HVRC Board resolution adopted, for release of Draft CEDS for public input																														
	HVRC Board resolution adopting Final CEDS																														
	<b>Public Input</b>	HVRC																													
	Draft CEDS distributed for public input																														
	Organize and follow-up on input as received and as needed																														
	<b>Incorporate Final Edits</b>	HVRC																													
	<b>Post Final Draft of 5-Yr CEDS to HVRC Website</b>	HVRC																													
<b>Post Final Adopted 5-Yr CEDS to HVRC Website</b>	HVRC																														

NOTE: Where Task / Sub-task description in this Timeline differs from CEDS RFP, the CEDS RFP supercedes.

### Respondent Acknowledgement

My signature below affirms my, inclusive of my firm, ability to meet the timeline as generally presented above. My signature also affirms that I am authorized to sign this Acknowledgement on behalf of me and/or my firm.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name & Title

## V. PROPOSAL REQUIREMENTS

Submission of a response does not guarantee awarding of a contract for consulting services for Project. Submission requirements are listed directly below and expanded upon in their respective sections. A proposed contract with full, standard terms and conditions as well as payment schedule shall be posted to RFP's location on HVRC's website by 3:00pm, Tuesday, March 11, 2025 (<https://hudsonvalleyregionalcouncil.org/regional-initiatives/economic-development/>).

### A. Submission

### B. Questions

### C. Proposal Format

1. Cover letter
2. Statements of Qualification and Experience
3. Example of prior CEDS report, or related work product
4. Scope of Work
5. Project Schedule
6. Fee Proposal
7. Proposed Subcontractors
8. Certificate of Good Standing
9. Insurance Requirements
10. Contract Terms & Conditions

### A. Submission

Proposals, in accordance with the format prescribed below, will be received **until 10:00am on Friday, March 28, 2025**. Any responses received after this closing date and time shall be rejected.

Proposals must be submitted via email to both Caleb Fine, Economic Resilience Coordinator, at [cfine@hudsonvalleyrc.org](mailto:cfine@hudsonvalleyrc.org), and Carla Castillo, Executive Director, at [ccastillo@hudsonvalleyrc.org](mailto:ccastillo@hudsonvalleyrc.org), with a subject line reading "2025 CEDS Update RFP – [Respondent Name/Org]".

### B. Questions

General inquiries concerning this Request for Proposals must be made in writing via email to Caleb Fine at [cfine@hudsonvalleyrc.org](mailto:cfine@hudsonvalleyrc.org), and copy Carla Castillo at [ccastillo@hudsonvalleyrc.org](mailto:ccastillo@hudsonvalleyrc.org), by 12:00pm on Monday, March 17.

General inquiries and their responses will be posted to HVRC's RFP location on its website (<https://hudsonvalleyregionalcouncil.org/regional-initiatives/economic-development/>) by 5:00pm, Tuesday, March 18. Where applicable, responses shall be incorporated into any resulting contract. It shall be the responsibility of the respondent to access general inquiry responses posted to HVRC's RFP webpage.

## C. Proposal Format

Written proposals should include, at a minimum, the following information in the order requested:

- 1) **Cover Letter.** A letter signed by an officer of the firm or individual, binding the respondent to all commitments made in the proposal.
- 2) **Statement of Qualifications and Experience.** Provide respondent's professional history, background, and relevant experience with economic development planning, stakeholder engagement (including both public and private sectors), focus groups, and meeting moderation. Provide listing of any award-winning publications, as well as three references for similar work, giving the name of the project, description of project, project period, project cost, and hyperlinks to plan documents. A focus on relevant work in the Mid-Hudson Region is ideal. Reference information should include the names of clients, primary contact person, and phone number.
- 3) **Example of prior CEDS report, or related work product.** Documentation of work products should demonstrate familiarity with the EDA CEDS planning document requirements and should include a strategic analysis or any related comprehensive planning reports.
- 4) **Scope of Work.** Confirmation of respondent's ability to fulfill scope of work and a discussion of respondent's approach to collaborative data compilation, to stakeholder engagement, and to preparation of similar plans. An alternative scope of work may be proposed; any alternative scope should meet the Draft CEDS Plan completion deadline of June 27, 2025.
- 5) **Project Schedule.** Respondents will affirm that they can meet the project schedule as outlined in IV. SUMMARY OF KEY DATES: PROCUREMENT & PROJECT SCHEDULES by submitting a signed copy of the HVRC EDD 2025-2029 CEDS Plan Completion Timeline. Respondents may propose adjustments to the schedule, ideally meeting the Draft CEDS Plan completion deadline of June 27, 2025.
- 6) **Fee Proposal.** The fee proposal shall include costs associated with the delivery and provision of a finished electronic product – a Draft CEDS Plan suitable for public input and acceptable to HVRC, as well as costs associated with carrying out all tasks specified in this RFP. The fee proposal should also include the names and titles of professionals assigned to Project, including hourly rates. The fee proposal should not exceed \$40,000 (forty thousand dollars) for the entire scope as presented in III. SCOPE OF WORK.
- 7) **Proposed Subcontractors.** The successful respondent will assume sole responsibility for completion of Project as required in this RFP. HVRC will consider only one individual/firm/company as the sole contact point regarding contract matters, whether subcontractors are used for one or more parts of this Project. Respondents who intend to subcontract one or more elements of this Project to other firms/individuals shall identify those work elements to be subcontracted and the firm/individual subcontractor. All subcontractors shall be included in the respondent's statement of qualifications. HVRC retains the right to refuse proposed subcontractors.
- 8) **Certificate of Good Standing.** Respondents shall submit a New York State Department of State Divisions of Corporations Certificate of Good Standing. All fees associated with acquiring the Certificate of Good Standing shall be borne by the respondent.

- 9) **Insurance Requirements.** Respondents shall affirm their ability to meet the following insurance requirements. Successful respondent will be expected to maintain insurance as noted in this section and provide an ACCORD Form acceptable to HVRC with submission of signed contract. The following types and amounts of insurance shall be maintained for the duration of the Project: workers' compensation insurance as required by law; \$1,000,000 of employer's liability insurance; commercial general liability insurance of \$1,000,000 combined single limit for bodily injury and property damage; automobile liability insurance of \$1,000,000 per occurrence for bodily injury and property damage covering all vehicles, including hired, owned and non-owned vehicles; and professional liability insurance in the amount of \$1,000,000 per claim/\$2,000,000 aggregate. Professional liability insurance shall be maintained for a minimum of three (3) years beyond the date of executed contract. The commercial general liability insurance must include contractual liability coverage, including coverage for any indemnities. HVRC shall be made additional insured on the commercial general liability and professional liability policies. All policies shall be endorsed to include a waiver of subrogation in favor of HVRC.
- 10) **Contract:** A draft contract with standard terms and conditions shall be posted to HVRC's RFP webpage by 3:00pm, Tuesday, March 11, 2025 (<https://hudsonvalleyregionalcouncil.org/regional-initiatives/economic-development/>). Respondents shall submit any requested changes to draft contract in same timeframe as submitted proposal.

## VI. SELECTION CRITERIA

### Selection Criteria

The selection committee will evaluate the applicants based on the following criteria:

- Thoroughness, creativity and clarity of the proposed work, schedule, and plan to accomplish the tasks for this Project.
- Qualifications and experience of personnel to be assigned to the Project.
- Clear understanding of the goals and outcomes of the Project.
- Experience on similar projects. Successful respondents will have experience responding to and knowledgeable of the EDA's CEDS document requirements.
- Access to technical resources.
- Ability to provide services on time, or to present a clear alternative.
- Fee proposal.
- References.
- HVRC may request additional information from respondents to finalize evaluation.

Based upon the evaluation of proposals submitted, finalists may be required to discuss their proposal with a review committee. Qualifications, Project approach, and ability to provide the required services to best serve the needs of HVRC can be expected to be topics of conversation.

HVRC and the review committee may elect to negotiate with the top ranked respondents and to accept modifications to the proposed scope of services and/or price when such an action is in the Project's best interest. Additional clarifying information may be requested to aid in the decision-making process.