

REQUEST FOR PROPOSALS

DEVELOPMENT OF A STRATEGIC PLAN FOR PENNSYLVANIA'S HERITAGE AREAS PROGRAM

A 5 Year Strategic Plan for HeritagePA, Pennsylvania's Heritage Areas, and the Department of Conservation and Natural Resources

HeritagePA seeks proposals for the development of a 5 year Strategic Plan that will inform the operation of the Pennsylvania's Heritage Areas Program. The selected consultant will analyze input from HeritagePA, individual Heritage Areas, the Department of Conservation and Natural Resources, and key stakeholders to develop a unified program vision and implementation plan.

Please find attached a description of the project, a list of consultant qualifications, and submission requirements.

Each submission will be reviewed by the Selection Committee, which consists of representatives from HeritagePA, the Pennsylvania Department of Conservation and Natural Resources (DCNR) and other key partners and stakeholders. The Selection Committee will choose three consultant teams for in-depth interviews, and will make a selection based on the results of those interviews.

Because this contract requires specific expertise in public participation strategies, heritage program development, and strategic planning the Selection Committee reserves the right to suggest additions to and subtractions from the teams interviewed, and to negotiate with consultants and sub-consultants interviewed to develop a consultant team acceptable to all parties. Following this selection, HeritagePA will negotiate a contract or contracts for the work and, with the selected consultant, finalize the project schedule and budget.

If you have any questions regarding the proposal submission or the content of the project scope, please contact Jane Sheffield, President, HeritagePA by calling (814) 940-1922 or by email jsheffield@alleghenyridge.org.

Submittals must be addressed to:
HeritagePA
c/o Allegheny Ridge Corporation
1421-1427 12th Avenue
PO Box 348
Altoona, PA 16603

And received
NO LATER THAN 4:00 P.M. ON WEDNESDAY, OCTOBER 1, 2014

CONTRACTING ORGANIZATION

A. Organization Background

HeritagePA

HeritagePA is a statewide non-profit association comprised of the leadership of all regions designated by the Governor as Heritage Areas in the Commonwealth of Pennsylvania. The 501 (c) (3) functions as a resource network for Pennsylvania's Heritage Areas and serves to strengthen and expand the outreach and contribution of each of its members through unified leadership, common purpose and collaborative effort. HeritagePA is committed to advancing the important work of its members and dedicated to advancing the heritage development movement in Pennsylvania and throughout the United States.

Pennsylvania's Heritage Areas

There are 12 state designated Heritage Areas in Pennsylvania, five of which have dual designations. The following are both State and National Heritage areas: Delaware & Lehigh National Heritage Corridor; Lackawanna Heritage Valley; Oil Region National Heritage Area; Rivers of Steel National Heritage Area; and Schuylkill River State & National Heritage Area. The solely state designated areas are: Allegheny Ridge Heritage Area; Endless Mountains Heritage Region; Susquehanna Gateway Heritage Area; Lincoln Highway Heritage Corridor; Lumber Heritage Region; National Road Heritage Corridor; and PA Route 6 Heritage Region. Currently all of the 12 heritage areas have 501(c) (3) nonprofit status.

Pennsylvania's Heritage Areas have evolved into effective facilitators of conservation, recreation, and preservation efforts in their respective regions. They are clearinghouses where citizens are comfortable in coming together to voice their opinions, rigorously debate, or simply to express concerns over real issues facing their communities. Critical issues such as regional planning, cultural conservation, private property rights, economic vitality, heritage tourism, educational excellence, and environmental stewardship are part of regional project deliberations with the goal of reaching consensus and accord as the centerpiece of true heritage development action.

DCNR Heritage Areas Program

DCNR established the Pennsylvania Heritage Areas Program in 1989. The program is housed within the Bureau of Recreation and Conservation (BRC). The DCNR Heritage Area Program manual describes the mission and breadth of the program as follows: *State Heritage Areas are large geographic regions or corridors of the Commonwealth that span two or more counties. These areas contain a multitude of historic, recreational, natural and scenic resources of state and national significance that collectively exemplify the heritage of Pennsylvania. Through regional partnerships and public grassroots planning strategies, these resources are identified, protected, enhanced and promoted to strengthen regional economies through increased tourism, creation of new jobs and stimulation of public and private partnerships for new investment opportunities. This holistic and bottom-up approach to planning ensures that the legacy of a region and the natural, educational and recreational values inherent to it are preserved for future generations.*

A Pennsylvania Heritage Area is a process as well as a product. It is both the means and the end to substantially enrich the quality of life in Pennsylvania and the communities and regions of the state where these initiatives are pursued. It is also about partnerships. The foundation upon which a heritage area is structured involves building and strengthening

regional coalitions of community leaders, non-profit interest groups, the private sector, state agencies and the federal government. Its success is dependent upon partners being able to erase governmental and institutional boundaries while planning, acting regionally and strategically.

The Heritage Areas Program has five focus areas: economic development, partnerships, cultural conservation, recreation and open space, and education and interpretation. Each Heritage Area was designated using a prudent, thoughtful approach, which included a feasibility study, a management action plan and an interpretive plan. These plans guide the work of the areas and were developed with a significant amount of relationship building, grassroots participation and input.

B. Project Guidance

HeritagePA will manage this project. A specific member of that organization will be appointed as the point person prior to commencement of the project. A Steering Committee has been assembled and includes representatives from HeritagePA, DCNR, and other partners. Other stakeholders may be included as deemed appropriate by the Steering Committee. This Committee will provide guidance and oversight in the plan development process.

Funding for the consultant services for this plan is being provided by the PA Department of Conservation and Natural Resources through a Partnership Program grant to HeritagePA. It is expected that this planning process will develop a strategic plan that will position the Heritage Area Program for success and strengthen not only the program but HeritagePA and its individual heritage areas both fiscally and with the unique niche that is filled by the work within the Commonwealth for the benefit of its residents and in the creation of a stronger tourism product related to culture, heritage and recreation.

PROJECT SCOPE

A. Background

Provided as Addendum #1 is "*Pennsylvania Heritage Areas – 'A Primer'*", which provides an understanding of the program and the work undertaken by the 12 Heritage Areas. The Program is established within DCNR to identify, protect, enhance, and promote the historic, natural, cultural, and scenic resources of Pennsylvania; and to stimulate community revitalization & economic development. A broad diversity exists in number of staff, operations, missions and types of projects and programs undertaken by each Heritage Area. However, in every case Heritage Areas are guided by community needs and organizational capacity.

Previous plans regarding strategies for moving the Heritage Area program have been undertaken in the past and should be reviewed in this process. Examples include but are not limited to the Conservation & Natural Resources Advisory Council (CNRAC) Study - Confronting Tough Times, 2009; HeritagePA Action Plan, 2009; HeritagePA Heritage Development Strategy, 2009; and the Heritage Areas Program Guidelines, 2009.

One of the challenges facing the Heritage Area Program and the 12 heritage areas is sustainability. In the last 10 years, there has been a significant decline in the Heritage Area line item within the DCNR budget. A total removal of the line item occurred in PA FY 2009/2010. In 2013 and again in 2014, through intense efforts on the part of HeritagePA

and a strong partner, the Growing Greener Coalition, the line item was restored at a level that will provide some short-term stability.

There are few foundations that fund operational expenses. Therefore, the state designated heritage areas currently have a single source of operational funding via the DCNR grant program. Similarly, additional grants can be obtained for projects but often do not allow for administrative costs.

The economy, changing administrations and shifts in DCNR's structure, focus, goals and programming have challenged the Heritage Area Program and its viability. Heritage areas struggle due to lack of resources, which diminishes their ability to support robust development. Inconsistent funding also hinders heritage areas planning efforts and response to community needs.

Pennsylvania's General Assembly passed legislation (HB 2177) in support of the Program in June of 2014. The legislation seeks to more formally establish the Program under the DCNR and sets forth a framework for program implementation.

B. Work Program Outline

Plan Objectives:

1. Establish a shared vision and assemble a strategic plan to guide the further development, implementation, and administration of the Pennsylvania Heritage Areas Program over the next 5 years.
2. Establish a tool to measure program success.
3. Provide a realistic phased implementation plan aimed at moving all program partners forward with a unified vision.

Data Gathering:

- Gather and analyze existing program and organizational documents, policies, funding history, historical documents, etc. HeritagePA will assist the selected consultant in identifying and capturing relevant documents.
- Conduct a facilitated joint kick off meeting between key DCNR staff and Heritage Area Managers to determine shared plan vision and goals.
- Conduct individual meetings with DCNR and HeritagePA to determine issues and opportunities.
- Conduct up to 12 facilitated meetings:
 - Past and present Heritage Area board members.
 - Targeted partner organizations.
 - Destination marketing organizations.
 - Other stakeholders /partners (e.g. NPS, PHMC, Preservation PA, DCED).
- Perform outreach to key personnel across state agencies to gather input on program perceptions, and perspective on potential program positioning and partnership opportunities.

Communications:

- Recommend a communication strategy for the heritage area program, DCNR and HeritagePA that will advance and strengthen the program and its recognition among the general public, legislators, the administration, and key state agencies.

Programmatic Analysis:

- The consultant will analyze program guidelines and policies to determine if they support or hinder the actions of individual Heritage Areas and overall Program implementation.

Program Assessment Tool:

- Consider input from data gathering meetings and analyze existing heritage program measurement tools, as found in other states or regions with similar programs, to devise an acceptable tool to measure program success. The measurement tool should quantify the success of individual Heritage Areas, program administration, and the success of the program as a whole.

Analysis, Recommendations, and Action Plan:

- The consultant will analyze all gathered information, formulate recommendations, and create a detailed action plan to guide program implementation over the next 5 years.
- The action plan will detail tasks, timeframes and potential partners, as well as identify roles and responsibilities of all parties.
- Identify "early implementation" action steps.
- The action plan should be phased so that tasks are implemented gradually over time, so as to avoid an overload of action items in the first several years.

Drafts and Final Plans

Drafts:

- A minimum of 2 drafts should be provided for review and comment prior to production of the final report.

Final Products:

- An Executive Summary in a reproducible digital format.
- 50 hard copies of the final plan produced utilizing green practices.
- 20 disks containing the Executive Summary and Final Plan.
- Digital files of all final work products suitable for upload and display on HeritagePA, DCNR and other websites.

C. Project Budget

The budget for the contract resulting from the RFP is not to exceed \$50,000, which includes consultant services, related travel, resulting publications, meeting expenses, communication costs, and all other costs.

SUBMITTAL AND CONSULTANT SELECTION

A. Consultant Qualifications

The Consultant for the project will need to assemble, manage and coordinate a consulting team with expertise in several fields. The Lead Consultant will be responsible for the timely completion, quality and integrity of the work completed by team members. At a minimum, the consultant team should have the following qualifications and experience:

- Proven expertise and extensive experience in strategic planning regarding heritage, cultural, and recreational assets and development and/or broad regional economic development.
- Proven experience in public participation and stakeholder (public and private entities) engagement projects including consensus building and dissemination of resulting information and strategies to produce successful outcomes.
- Strong expertise in analyzing qualitative and quantitative data and developing recommendations and action plans that include milestones and benchmarks to ensure success.
- Experience with communicating complex concepts to a wide range of people using a variety of methods.
- Demonstrated experience with developing strategic plans with diverse partners and organizational structures.
- Demonstrated experience in developing marketing and public relations strategies for a broad spectrum of audiences.
- Experience with or significant knowledge of Pennsylvania's Heritage Area Program and the Department of Conservation and Natural Resources, Bureau of Recreation and Conservation is preferred.

B. Selection Process

Each submission will be reviewed by the Selection Committee, which will consist of representatives from HeritagePA, the Pennsylvania Department of Conservation and Natural Resources and other key partners and stakeholders. The Selection Committee will choose three consultant teams for in-depth interviews, and will make recommendations based on the results of those interviews.

Because this contract requires specific expertise in a variety of disciplines, the selection committee reserves the right to suggest and negotiate with consultant and sub-consultants interviewed to develop a consultant team, project budget, project schedule, and any revisions to the project scope of work, acceptable to all parties.

C. Selection Criteria

The following criteria will be used in evaluation of the submittals:

- Demonstration of a thorough understanding of the heritage area program.

- Demonstration of a thorough understanding of public participation and creativity of approach in gaining maximum participation.
- Quality of Consultants' experience with similar projects.
- Qualifications of the primary consultant, and particularly those of the team leader.
- Qualifications of the consultant team, particularly those individuals who will have the primary responsibility for each firm.
- Soundness and creativity of the proposed approach.
- Responsiveness to the needs of HeritagePA, the Selection Committee, and the project partners.
- Cost reasonableness within the project cost cap.

D. Project Schedule

Distribution of Request for Proposals	August 25, 2014
Submittals Due	October 1, 2014
Selection of three Consultant Teams to be interviewed	October 15, 2014
Consultant Interviews	Week of October 20, 2014
Consultant Selection and Notification	November 6, 2014
Project Start Date	November 13, 2014
Project Completion	June 15, 2015

E. Submittal Requirements

Each consultant team is asked to submit the following information:

- A letter of interest in the project.
- A description of the team, including descriptions of the firms or individuals involved, and resumes of key personnel with special attention given to applicable experience as described above under "Consultant Qualifications."
- An annotated project list that demonstrates past experience in similar projects and includes a listing of client contact information to include names, titles, addresses, phone numbers, and email addresses.
- A general description of the approach the team would use to accomplish the outlined Scope of Work.

- A list identifying the individuals who will have primary responsibility for project elements and time devoted to each element. Additionally identify by team member how much time each team member will spend on the project.
- A client reference list, containing no less than 4 references including names, titles, addresses, telephone numbers and emails of key contacts.
- Identify the products that will be produced during the project. Consultant should identify by task and by product, how materials will be produced and distributed, number of copies that will be provided including format, number of final copies and executive summaries that will be produced.
- An itemized budget detailing all elements of project expenses.

The submittal should be limited to twenty (20) single sided pages, including the transmittal letter.

The Selection Committee will not review submittals that address only part of the Scope or teams that do not incorporate all of the expertise and qualities described in Consultant Qualifications.

Twelve hard copies of the submittal must be received by:

**Allegheny Ridge Corporation
1421-1427 12th Avenue
PO Box 348
Altoona, PA 16601**

NO LATER THAN 4:00 P.M. ON WEDNESDAY, OCTOBER 1, 2014