



# Pacific NorthWest Economic Region

## **Request for Proposals - Roadmap and Playbook Development Consultant**

### **Comprehensive Regional Pandemic Resilience Roadmap**

#### **Introduction**

The Pacific Northwest Economic Region (PNWER) received federal funding through the Economic Development Administration (EDA) to develop a Comprehensive Regional Pandemic Resilience Roadmap for the Puget Sound. This project will analyze the economic impact of COVID-19, identify best practices in mitigation, recovery and resilience, and provide overall recommendations for the region for the current COVID-19 recovery effort and to better prepare for future pandemics.

#### **Overall Purpose**

This project will enhance the capacity of the region to address the serious challenges of COVID-19 impacts and develop a roadmap or action plan toward pandemic resilience for the entire region. The project will provide a comprehensive actionable strategy (Resilience Roadmap) to address COVID-19 issues and challenges and make necessary improvements to address future pandemic events. The Comprehensive Pandemic Resilience Roadmap will incorporate lessons learned from COVID-19 pandemic and pandemic resilience best practices with a strong focus on economic resilience challenges in the context of health safety, the implications for preparedness, response, recovery, and mitigation, and identify needs and respective improvement actions. The Roadmap will help with the present pandemic and prepare the Central Puget Sound for future pandemics, while at the same time assisting in lessening future blows to the economic welfare of the region. Roadmap objectives include enhancing the capacity of local governments, economic development agencies, and business associations to be better prepared for safe operation and economic survival in a pandemic.

In 2010, PNWER was funded by the Department of Homeland Security (DHS) Office of Health Affairs after the H1N1 pandemic to initiate a series of workshops and exercises in the greater Puget Sound Region which culminated in the Comprehensive Community Bio-Event Resilience Action Plan for the Puget Sound Region. This two-year effort working with over sixty-five public and private organizations helped to define gaps in the pandemic plans for the region. The current project will revise, update, and expand this work to address economic recovery and broader resilience challenges and needs based on COVID-19 lessons learned to assist public and

private sector decision-makers in the Puget Sound Region and across the nation to improve resilience for future global pandemics.

The COVID-19 pandemic has highlighted a host of additional complex issues and shortfalls, including unexpected, deleterious, and far-reaching repercussions for local and regional economies that demonstrate limited understanding of and capabilities to address competing interests and needs in the context of inter-related economic and health resilience demands. These challenges cut across the resilience mission areas of protection, preparedness, mitigation, response, and recovery and include an extensive range of new needs. Looking just at economic recovery, issues include healthcare and business supply chains; human resource considerations such as protecting staff, sick leave, emergency leave, flexible child-care arrangements, dealing with ill workers, telecommuting, insurance coverage, etc.; better-informed and coordinated decision-making across communities to address risks associated with business closure and restarts, quarantines and social distancing versus health impacts; and how to keep businesses and other entities in operation and attract new investments and economic development opportunities. An overarching challenge is how to address the impact of social media on public behavior, fears, and attitudes that have a direct bearing on economic recovery. Beyond this, communities and regions need to not only recover, but they need to have the resources, tools, and other capabilities to build and sustain pandemic resilience to thrive and grow.

### **Required Assistance**

PNWER seeks a qualified consultant to provide technical writing and overall framework design in the development of the Regional Roadmap. The consultant will lead the drafting of the Roadmap and accompanying Playbook and work with PNWER staff and several other consultants working on economic impact and outreach. Consultants may apply for more than one RFP. A qualified consultant should have a background in one or more of the following: economic analysis; public health; critical infrastructure interdependencies analyses; emergency management; pandemic planning; and development of relevant cross-sector disaster after-action reviews.

### **Roadmap and Playbook Development Consultant (Budget available \$60,000)**

PNWER seeks a consultant to provide technical writing assistance and input in the formation and development of the Comprehensive Regional Pandemic Roadmap and Playbook. The consultant will help analyze and produce the final product. The consultant will also advise PNWER on the formation of workshops, exercises, and the development of surveys and interviews to complete the work.

The primary focus of this project is to improve capacities of communities to safely and economically respond, survive, and recover from a future pandemic based on identifying gaps and strengths observed in COVID 19 response and recovery. The project will examine gaps and recommendations for best practices and methods identified via the Roadmap process in a community using a cross-sector and multi-discipline approach. Shortening the period of maximum economic constraint while preventing negative health impacts, can do much to limit serious economic consequences to individuals, families, and small businesses. The COVID-19 pandemic resulted in numerous widespread closures and shut-downs, and this project aims to understand how best to respond to public health concerns in the future while preserving economic continuity.

The consultant will coalesce the data that is collected by the PNWER team and other consultants into a coherent, clear, concise written document. This written document will be a Roadmap and corresponding Playbook that has applicability across other metropolitan areas and regions in the United States.

### **Consultant Tasks**

The Roadmap Development Consultant will need to work closely with the PNWER staff and other consultants (the Project Team) selected to promptly deliver the tasks outlined below, which correspond to the Tasks required within the EDA contract.

#### **Task 1: Identification and assessment of issues and needs that have emerged from the COVID-19 pandemic**

The consultant will work with PNWER to develop a written survey and provide guidance on information needed for the development of the roadmap. PNWER will distribute the written survey to as many organizations as possible. The survey will seek to identify which policies were effective and what issues arose during the COVID-19 pandemic response. The Project Stakeholder Advisory Group will assist in distribution of surveys and identify surveys already conducted to include in this review.

The consultant will attend monthly webinar(s) and/or conference calls organized by PNWER to gather information from a variety of disciplines and organizations.

#### **Task 2: Drafting of a detailed outline for the Roadmap based on the needs identified in Task 1**

The consultant will work with the Project Team to produce the Roadmap outline, which will entail reflecting on the extensive lessons learned from COVID-19. This includes addressing

economic impacts, recovery, related risk-based mitigation needs, and solutions such as human behavioral issues including social media, etc. The detailed outline will be coordinated with stakeholders participating in the project and revised based on their input.

The consultant will help identify the priority scoping for the Roadmap, including helping the Project Team identify priority sectors through the lens of economic and health resilience of the region. The consultant should produce a strategic outline for how this region can be better prepared for future pandemics.

**Task 3: Identification of existing best practices and solutions that can be leveraged for specific improvement actions**

The consultant will work with the project team to accomplish the task in two ways: through research on what other states and localities are doing and have done during this pandemic, and with stakeholders through the use of a combination of technologies from conference calls, video teleconferencing, webinars, and electronic polling to conduct meaningful data-gathering. Initial planning efforts will be broken down by sector and discipline. This approach will be used early in the process but will expand to a multi-disciplinary, public-private sector approach as the interdependencies are identified between the disciplines. While each county has likely addressed this issue individually, a regional example will reveal best practices that can be shared and adopted by other individual jurisdictions.

It will be critically important to include the private sector early in the planning process to get their buy-in during the planning process and to learn from their own individual experiences. By taking a regional approach, this pandemic Roadmap will cross county boundaries and enable both small employers and large employers with an employee base scattered among many jurisdictions to participate in the planning phase above.

As the project proceeds, the consultant will integrate inputs gleaned from discipline and sector-focused discussions (e.g., public health/healthcare, financial sector, transportation systems, commercial sector, etc.) to produce a broad cross-sector and discipline consensus on needs and solutions. It is envisioned that lessons learned will continue as the COVID-19 pandemic proceeds through additional phases and the region remains in both the response and recovery mode. The project team will continue to incorporate these additional findings into the Roadmap throughout the 18- month duration of the project.

**Task 4: Production of draft Roadmap from the inputs from Tasks 1-3**

The consultant will be expected to collaborate with the Project Team to utilize the information gathered in Tasks 1-3 in drafting the Roadmap. This will build off of the outline created in Task

2. The consultant will produce a draft Roadmap for review and distribution prior to the mid-term stakeholder review.

**Task 5: Participate in Midterm Stakeholder Review of Project, which will cover the work done to date and the initial draft Roadmap**

The consultant will present initial findings and analyses from the draft Roadmap to stakeholders, and capture feedback and input from all stakeholders.

**Task 6: Participate in a PNWER-led Regional Pandemic Resilience Roadmap discussion-based, tabletop-style workshop to evaluate and identify gaps in the Roadmap and illuminate new ideas for solutions**

The major objective of conducting this exercise will be to assess the draft Roadmap. Conducting the exercise will enable participants to identify additional needs and potential solutions that could be incorporated into the final version of the Roadmap. Additionally, the exercise will be used to validate the revisions and material already incorporated into the draft Roadmap. It is anticipated that participation in this tabletop would include up to 250 representatives from public, private sector, non-profit, academic, community, and other organizations.

The exercise scenario, procedures, and supporting materials for the tabletop will be developed by PNWER and a Scenario Design Team of key stakeholders and produced by PNWER, with exercise facilitation provided by PNWER. During the day-long exercise, participants will be provided “mini-briefings” from public health officials and experts on local, state, federal, and private sector pandemic plans and policies.

The consultant will be expected to attend the tabletop exercise, address issues that arise with the Roadmap during the event, and debrief with PNWER staff following the tabletop event.

**Task 7: Assist PNWER in Producing Exercise After-Action Report**

The PNWER staff will produce the after action report. The consultant will incorporate findings and recommended pandemic resilience improvement actions to incorporate into the Roadmap. The AAR will be used to augment and refine the contents of the Roadmap and to inform what changes are still needed to the draft.

**Task 8: Finalize the draft Roadmap based on the exercise outcomes and any other additional pandemic-related information gathered**

Consultant will finalize the draft of the Roadmap into a document for review.

### **Task 9: Participate in Stakeholder Final Validation Virtual Meeting for the final Roadmap**

The consultant and PNWER team will present the final Roadmap to the stakeholder group. The outcomes of the Validation Virtual Meeting will be incorporated into the final Roadmap.

### **Task 10: Development of a “Playbook” for the promulgation of the Roadmap to other regions in the nation**

The consultant will help design and develop a “Playbook” in the form of a concise checklist of the needs and respective improvement actions documented in the Roadmap. The Playbook will be also included as an appendix to the Roadmap. The Playbook will provide an easy to use tool for public and private sector stakeholders to develop their region or communities’ pandemic resilience capabilities.

#### **Timeline:**

The project is scheduled to be completed within 18 months (April 2021-Sept. 2022). PNWER will lead the following tasks. Consultants will provide technical assistance in the development of the roadmap and provide needed support on relevant tasks.

- Task 1: Outreach to, and engagement of, regional partners representing the public and private sectors (within first 60 Days)
- Task 2: Identification and assessment of issues and needs that have emerged from the COVID-19 pandemic (90 days and ongoing)
- Task 3: Production of an updated and expanded draft detailed outline for the Roadmap based on the needs identified in Task 2 (60 days)
- Task 4: Identification of improvement actions in collaboration with stakeholder participants and advisory group (policies, research, technology and tool development activities)
- Task 5: Midterm Stakeholder Review of Project, which will cover the work done to date and the initial draft Roadmap (50 days)
- Task 6: Develop and conduct a Regional Pandemic Resilience Roadmap tabletop exercise to evaluate the Roadmap, identify gaps in the roadmap, and illuminate new ideas for solutions (60 days--some overlap with Task 3)
- Task 7: Finalization of the draft Roadmap based on the exercise outcomes and any other additional pandemic-related information gathered (90 days following the exercise)
- Task 8: Development of a “Playbook” for the promulgation of the Roadmap to other regions in the nation (45 days)
- Task 9: Production of a short promotional brochure for the Roadmap in electronic and print form (including short video) and available online to accompany the Roadmap and

Playbook explaining its genesis and how users can work with their respective stakeholders to tailor it to their needs (30 days)

- Task 10: Development and implementation of a Roadmap outreach strategy and campaign to key state, local, and private sector stakeholders across the nation to promote and explain the Roadmap and how to customize it and the Playbook for their regions (40 days for strategy development and 60 days for implementation)
- Task 11: Produce final report on the Project

#### Task Timeline

Task #	Apr-21	May-21	Jun-21	July-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	
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#### The following topics are envisioned as potential elements of the Roadmap

1. Executive Summary
2. Identification and high-level assessment of sector-specific issues that have emerged from the COVID-19 pandemic
3. Economic resilience analysis, best practices, and recommendations for the region
4. Strategies and best practices to consider in future pandemics to improved business and government continuity
5. Improvement Actions (policies, research, technology, and tool development)
6. Pandemic Playbook (guide for other regions to implement best practices)

**Qualifications and Proposal Submission Information:**

1. Introductory letter (8.5x11 with 1 inch margins) identifying the position you are applying for, a detailed description of experience, and brief overview of your proposal (not to exceed two pages)
2. Proposal, including summary of the project team and their applicable background experience and the team's understanding of and proposed approach to completing the project. Please provide examples of past related or relevant work. (5 pages max, standard format 8.5x11 with 1 inch margins)
3. Project rates sheet or budget (1 page max)
4. A minimum of 2 references from past projects (1 page max)
5. Resumes of each member of the project team (no page limit)

**Deadline**

Submissions will be accepted until **July 2 at 5pm Pacific Time**. Proposals will only be accepted by email. Late submissions will not be accepted. Please send proposals by email to Betz Mayer at [Betz.Mayer@pnwer.org](mailto:Betz.Mayer@pnwer.org).

Questions should be submitted by **June 18** in writing to Betz Mayer at [betz.mayer@pnwer.org](mailto:betz.mayer@pnwer.org). All interested consultants may obtain a copy of the questions and responses by submitting a written request by email.

**PNWER is an equal opportunity employer and will not discriminate against any employee or applicant on the basis of age, color, disability, gender, national origin, race, religion, sexual orientation, veteran status, or any classification protected by federal, state, or local law.**

**Proposal Evaluation and Scoring**

A. Each proposal has a total possible score of 130 points with the points assigned as follows:

Proposal Evaluation Criteria	Points
Overall approach, including a demonstration of a clear methodology and approach, projects scope requirements, and objectives to achieve the tasks in the RFP	30

Demonstrated experience directly related to consultant position criteria	<b>30</b>
Demonstrated relevant experience working with regional partners. Demonstrated knowledge of and/or experience working with local stakeholders and jurisdictions.	<b>20</b>
Price proposal clearly stated consultant charges, including overhead, profit, and other relevant invoicing policies. Overall competitiveness of costs.	<b>10</b>
Ability to attend required meetings both in-person and virtual, and provide required input to PNWER	<b>5</b>
Overall proposal was complete, concise, clearly written, thorough, and followed instructions	<b>5</b>
<b>Total Possible Written</b>	<b>100</b>
Oral Interview Criteria (if required)	
Demonstrates knowledge and understanding in approach to accomplish work and address issues. Ability to elaborate on proposed project approach and respond to questions about potential aspects of the project.	<b>20</b>
Ability to clearly communicate orally and responds appropriately to questions. Level of Knowledge about the topic.	<b>10</b>
<b>Total Evaluation (Written and Oral)</b>	<b>130</b>

- A. Each criteria listed above will be given a weighted score from 0 to 5 based on the points listed above to determine their overall value. The 0 to 5 scores represent the following:

0 = 0% Did not provide a response to the requirement.

1 = 20% Far below expectations- a poor response that minimally meets the requirements.

2 = 40% Below expectations- a fair response that meets the requirements in an adequate manner. Demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by the proposer.

3 = 60% Meets expectations- a good response that meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter. An average or slightly above average performance with no apparent deficiencies noted.

4 = 80% Exceeds expectations- a very good response that provides useful information, while showing experience and knowledge within the category. Proposal is well thought out and addresses all requirements set forth. The proposer provides insight into their expertise, knowledge, and understanding of the subject matter

5 = 100% Far exceeds expectations- a superior response that is a highly comprehensive, excellent reply that meets all requirements of the areas within that category. Considered to be an excellent standard, demonstrating the proposer's authoritative knowledge and understanding of the project.

- B. Pricing will be scored as a percentage of the lowest proposed price. The lowest priced proposal will be awarded the maximum number of points. All other proposers will receive a percentage of the points as their proposed pricing compares to the lowest proposed price.