



SUPERIOR TRADE ZONE

REQUEST FOR PROPOSAL FOR ADMINISTRATIVE SERVICES FOR THE SUPERIOR TRADE ZONE

The Superior Trade Zone (STZ) requests proposals for Administrative Services in support of the zone.

Proposals will be accepted from individuals or from organizations. However, organizations must designate an individual who will be the primary point of contact through the duration of the contract for administrative services and substantiate his/her experience and ability to perform the work.

The person, firm or organization who fills the position will work as a contractor the Authority. In that roll he/she will:

- Provide own workspace.
- Provide all equipment and supplies necessary for conducting STZ business (see list of Duties and Responsibilities).
- Plan work so that it is completed within the prescribed time frame.
- Provide all of the services outlined in the list of Duties and Responsibilities.
- Submit to the Authority monthly invoices for services provided.
- Accept responsibility for paying an applicable local, state, and federal income taxes, invoices, etc.
- Register for and maintain any applicable local, state, or federal business licenses.

The bid package includes a list of Duties and Responsibilities which outlines the Authorities basic requirements. If an individual or organization would like to offer additional services, those may be included in the proposal and may be considered in the selection process.

Proposals must address the Selection Criteria included in the bid package and show evidence of capacity and experience that will meet the needs of the Authority as outlined in the Duties and Responsibilities.

Proposals are due by **12:00 p.m.** Eastern Time on **Monday, August 7, 2017.**

An important consideration for selecting a proposal is costs.

Final selection of an individual or organization to provide administrative services will be approved by the Superior Trade Zone Board of Directors.

This position must operate with significant autonomy subject to Board and Executive Board oversight, and thus must have an impeccable record of meeting stringent fiduciary and ethical standards. For this reason, the Authority will conduct reference, criminal records, and credit history checks prior to entering into a contract for services.

Proposals can be emails to the Chair of the Superior Trade Zone at the following address:

- Scott Erbish at SErbisch@mqtco.org
- Subject: Response to RFP for STZ Administrative Services

REQUIREMENTS

Proposals must be submitted in electronic form to Scott Erbish at SErbisch@mqtco.org. Proposals must be submitted in English and in Word or .pdf format by the following date and time:

Date: Monday, August 7, 2017

Time: 12:00 p.m. E.S.T.

Superior Trade Zone

Attn: Scott Erbish, Chair

SErbisch@mqtco.org

INQUIRIES

All questions regarding this RFP and its process must be sent in writing via email only to Scott Erbish at SErbisch@mqtco.org.

STZ does not sanction as accurate information, instruction or advice provided by any source other than the Chair regarding this Request for Proposal.

RFP COSTS

Any and all costs associated with the development and submissions of proposals are the sole responsibility of the proponent.

CONFLICT OF INTEREST

In relation to the performance of its contractual obligations in an STZ Administrative Services agreement, the contractors other commitments, relationships or financial interests Includes, but is not limited to, any situation or circumstance where there might be a conflict of interest:

- i. Having or having access to information in the preparation of its proposal that is confidential to STZ and not available to other proponents.
- ii. Communicating with any person with a view of influencing preferred treatment in the RFP process; or
- iii. Engaging in conduct that compromises or could be seen to compromise the integrity of the open and competitive RFP process and render that process non-competitive and unfair.

- iv. Could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement; or
- v. Could or could be seen to compromise, impair or be incompatible with the effective performance of its contractual obligations.

TERMS AND CONDITIONS

STZ has the right to:

- A. Reject any or all proposals;
- B. Accept any proposal in whole;
- C. Accept any part of a proposal or parts of multiple proposals;
- D. Elect not to proceed with the services at its absolute discretion;
- E. Alter the schedule, proposal call or procedures or objective of the services or any other aspect of the RFP, as it may determine in its sole and absolute digression; or,
- F. Cancel, then advertise or call for new proposals for the services.

SCOPE OF WORK – Duties and Responsibilities

Category	Task
Governance Support	Overall management and support of the STZ, set up meetings upon request, attend Board meetings and Committee meetings and provide secretariat back-up for STZ Board and/or committees, provide monthly management reports in support of decision-making, provide administrative support for STZ Board as required, provide advice and recommendations to STZ Board in order to improve operation and retain and increase membership.
Head Office Services	Monitor and respond to inquiries from members and public at large, provide physical mailbox location and manage all incoming and outgoing mail, provide and administer a phone number and physical address for STZ, recommend changes to reduce costs, provide monthly invoices to STZ Board, act as Administrator for STZ LinkedIn Group and Facebook accounts or other social media platforms; monitor posts for appropriateness, approve member requests, under the guidance of the STZ Board. Prepare and distribute meeting agenda's and back up materials to all members and to the public.
Financial Management Support	Manage STZ finances under the direction of the STZ Board, file all taxes and legal documentation if needed, manager and report on financial accounting monthly, provide payment to members and suppliers as approved by the STZ Board, credit card processing, provide strategic advice and recommendations to STZ Board on all financial management issues, maintain an accurate and sound financial accounting system and bank account for STZ , provide oversight and manage accounts payable/account receivable, assist STZ Board in budget preparation, monitor, recommend and prepare for any external audits as necessary and directed by the Board.

Professional Development and Certification Administration	Work with the Board STZ Board and member units of government, to find administrative efficiencies in program delivery, incentives that may be proposed and to successfully enhance and expand professional development programs and activities that promote economic development within the STZ region; communicate with applicants, local units of government and assessors pre and post events, book venues for events and manage event costs and revenues, send required materials to applicant, local units of government, assessors. Maintain appropriate knowledge of program available
Website Support	Liaise with Director of STZ Board, website hosting firm and other contractor(s) to ensure the STZ website is up-to-date, being utilized to the best advantage of the STZ and to ensure efficient and effective administration of the STZ and its membership.
Database Support	Collaborate with STZ Board to maintain the integrity of membership data, participate in ongoing review and improvement in the use time and incentives that could crat economic development.
File, Record and Data Management	Ensure effective, efficient and accessible virtual and all STZ documentation, take meeting minutes and distribute and post minutes, create purchase policies and other policies as may be deemed necessary by the STZ Board, ensure appropriate and effective confidentiality and privacy policies and processes are followed at all times, ensure business continuity and confidentiality and ensure risk management processes are in place.
Monitoring and Implementation of Partnership Agreements	Assist STZ Board in establishing, implementing and monitoring appropriate partnerships and collaborations as needed.

SUBMISSION REQUIREMENTS

Submissions must at a minimum provide the following information:

- Description of services/tasks being proposed/offered;
- A firm and detailed breakdown or proposed costs;
- A proposed plan and description of how services will be smoothly transferred from existing STZ Board with details on hose service disruptions will be mitigated.
- Details about proponent firm, including but not limited to: location of office(s); background and experience; years in business; where the business is registered; past and current client list; legal structure of business (i.e. partnership, corporation, etc.); list of countries in which form regulatory conducts business.
- Names and contact information of at least three (3) references;
- Names and resumes of key personnel who will provide services to STZ Statement of Values and Code of Ethics.

SELECTION PROCESS

Timetable for the RFP

Last Date for Questions:	Friday, August 4, 2017
Closing Date for Submissions:	Monday, August 7, 2017
Target Date for Selection:	Tuesday, August 22, 2017

SELECTION CRITERIA

- ✓ The STZ Board or designated Committee will evaluate proposals through predetermined criteria (see chart below).
- ✓ Points will be assigned to each proposal based on the information provided in the submission and the professional judgement of the STZ Board and/or Committee from their reviews of the documentation provided and any clarification sought and research conducted. All discussions of the Selection Committee will be kept strictly confidential.
- ✓ This process will enable the STZ Board and/or Selection Committee to assess the proponents' qualifications and to select the proponent(s) that, in the STZ's sole and exclusive determination, best meet its administrative service delivery requirements.
- ✓ The respective weighting of the evaluation criterion is set out below:

Selection Criteria	Weighting
Proponent's Experience and Qualifications	30%
Pricing – Competitive fees and expenses	25%
Skills and qualifications of assigned personnel	20%
Value add or STZ and fit with STZ culture and values	15%
Quality of Proposal	10%

- ✓ During the evaluation process, STZ reserves the right to request additional information or clarification from any party that submits a proposal.
- ✓ Potential contractors may be invited to participate in an interview as part of the evaluation process.
- ✓ Contractors should, in their proposal, outline their experience and ability to work regionally as well as statewide and with adjacent states bordering the Upper Peninsula of Michigan.