

# REQUEST FOR QUALIFICATIONS



## EDUCATIONAL TRAINING ON COMMUNITY, WORKFORCE AND ECONOMIC DEVELOPMENT

A program of the



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## **Economic and Community Development Skills Training Request for Qualifications**

The Wisconsin Economic Development Association is launching a new educational attainment platform called the Wisconsin Economic Development Academy. The Academy is focused on several target audiences and is structured to provide introductory classes through short webinar **Briefings** and more in-depth ½ day **Comprehensive** in-person offerings. This RFQ is to select instructors and develop training offerings for the initial list of courses. In addition, the 2018 WEDA Fall conference will be focused on skill development, so other topics that are not part of the Academy initial course list will be considered.

### **SUMMARY**

1. The Academy Model is designed to provide training to all experience levels of community and economic development professionals, and those just entering the profession or officials that are seeking a greater understanding of the various community and economic development tools or activities.
2. The **Academy Comprehensive** offerings will provide in-depth training programs that will allow professionals to gain credits toward or continue their CEcD, EDFP and or ACIP credentials. Each class will be submitted to appropriate credentialing agencies to determine which programs will receive credits toward specific credentials.
3. The **Academy** will seek to document participants that have successfully achieved a higher level of proficiencies by attending the course or series.
4. The **Academy Briefings (webinars)** are defined as Short-Strike Models (60 to 90-minute trainings). These programs will be introducing the topic and providing foundational content. These topics are designed for those professionals or individuals not interested in pursuing continuing education or professional credentials for economic or community development professionals. Each Briefing will end with a description of the value of attending the ½ day Comprehensive training on the same topic.
5. The **Academy Briefings model** is also designed for professionals working just outside Economic Development Organizations – yet their work or volunteer efforts crosses over into Academy topics – e.g. bankers, real estate brokers, town/village clerks/administrators, community development commission members.

### **Initial Academy Courses:**

1. The Academy committee has developed the framework of the initial Briefing and Comprehensive course offerings to include:
  - a. **TAX INCREMENTAL FINANCING:** Basics, Reporting, Calculating Impact, Proposed Legislation, Case Studies
  - b. **WORKFORCE DEVELOPMENT:** Talent Recruitment, Resources, Real Solutions, Best Practices and/or Collaborative Models of Companies leveraging Communities for Best Talent
  - c. **FISCAL & ECONOMIC IMPACT ANALYSIS OF ATTRACTION DEALS:** Evaluation of Benefits, Best Practices in Development Agreements, MOU's, Prioritizing Resources and Deal Flow and Getting Deals across the Finish Line
  - d. **BUSINESS RETENTION & EXPANSION:** Developing a Strategic Program, Rural and Urban Models, Outcomes, Documentation
  - e. **BROWNFIELD RE-USE AND DEVELOPMENT:** Grants, Redevelopment/Community Development Authorities

## 2. **Additional Academy Courses:**

The Academy committee will entertain additional topics for future programming consideration that could be part of the Academy Model or for future WEDA conference workshops or tracks. These topics could be wide ranging in scope but several examples are provided below as suggestions:

- Redevelopment authorities and redevelopment projects
- Rail service project planning and site selection considerations
- Business Park design and phasing of public investment
- Placemaking

All submittals should develop a format like the following Academy program summaries developed by the Academy Committee. The 2018 WEDA Fall Conference will be focused on the Economic Development Toolbox, so some training that maybe appropriate for either the Briefing (90-minute webinar) or Comprehensive (1/2 day training) model could be incorporated into the conference agenda. The goal of the 2018 Fall Conference is to expose conference attendees to the Academy model and the Toolbox publication that will be launched in May 2018.

## 3. **Evidence of Proficiency – Each Academy Program to include:**

- Online Tool
- Quiz on each topic for proficiency standard
- Survey of experience for quality control – if course is considered advertisement, instructor will not be used in future

## 4. **Form a Network of Class Participants -- Blog to discuss topics**

The purpose of the networking activity is to assist professionals in expanding their network. WEDA will be responsible for the creation of the model, but instructors

- Gauge how participants are using tools in their community – refinement of program
- Instructor to monitor for specific individuals asking questions on specific topics
- Determine the number of non- development professionals, e.g. municipal professionals, Bankers utilizing blog

# Tax Incremental Financing

## Introduction

The objective of the TIF Basic course is to explain the basics of tax incremental financing and how communities can use this tool to spur economic growth. Course participants will learn what a TIF is, how a TIF works, the different types of TIFs, and how to create a policy manual that will help ensure the use of TIF meets community goals and objectives.

## Topics/Content

1. TIF introduction
  - a. Basic function of TIF
  - b. TIF law and background
  - c. Types of TIF districts
2. How a TIF works
  - a. How a TIF district is created
  - b. Sharing the tax base
  - c. Calculating the tax increment
3. Potential benefits and risks of using TIF
4. Assessing a municipality's readiness to use TIF
  - a. Goals
  - b. Political environment
5. Creation of policy manual
6. Creation of a TIF Plan – Eligible Activities by Type
7. TIF Expenses – Determining how your TID will cashflow
8. Case Study Exercise – The Comprehensive course would have a group activity whereby participants break up into groups and use to evaluate 2 projects that could be tied to TID, the groups would choose different methods or approaches to the TID plan, run the numbers and report out on how they structure the TID.

## Training objectives

This course is an entry level course that is intended for local elected government officials or other staff members who need a basic understanding of TIF. After this course, participants should be able to understand what TIF is, how it can benefit their communities, and how they can start using TIF in their communities. At the end of this course, participants will be able to form the cornerstones of a TIF policy manual to use within their communities.

## Structure of Course:

- Academy Briefing – webinar
- Academy Comprehensive – ½ day in-person training
- On-demand video(s)– Explanation of TIF to Joint Review Board and TIF.

## Deliverables:

Participants will be able to understand the role and purpose of Tax Incremental Financing. The participants of the Comprehensive course will be able to understand and develop a framework for a TIF Plan and be able to develop scenarios on TID plans and expenses.

**Instructors:** Experienced firm or professional with extensive TIF experience.

## WORKFORCE DEVELOPMENT

### Introduction:

Workforce Development is a deliberate effort to match talent within the community to best suitable opportunities in the current workforce. Challenges currently faced by employers is a perceived and real divide between available candidates with the needed skills, experience and willingness to commit to entry level and skilled careers in manufacturing, technical and professional service positions. Employers convey that too many of the available candidates are not meeting basic expectations.

The problem is intensified with the fact that the unemployment rate in Wisconsin is at a historical low, participation rates in the workforce are at a historical high and companies are forced to act more quickly to secure positions.

Increasingly, community strategies pool resources together, including technical and four-year college business development advisors, workforce development managers and industry consultants in Human Resources to devise community plans for talent attraction and retention. Knowledge of best practices learned from companies that deploy the most creative and effective strategies to market their companies and their positions are shared as a part of the strategy.

### Topics/Content:

1. Basic best practices in workforce development – case studies
2. Identifying and leveraging resources:
  - Model communities tackling the skills gap problems
  - Resources identified to assist in identifying, attracting, retaining, matching and securing talent.
  - Labor market studies and applications
  - Community attraction strategies, e.g. Imagine Pittsburgh, Austin TX
  - Programs to assist in training special populations
3. Strategies to assist communities in being more effective in attracting candidates
  - Teaching tools regarding various online platforms, improvements to career pages and alerting companies to all of the electronic connections for job postings – forming roundtable/forum events that lay out programming
  - Organizing and launching hiring events/community gatherings to promote community's ability to attract talent
  - Assist in conveying a unique and positive community and company culture

### Training Objectives:

1. Knowledge of current workforce development practices, grant resources at the state and local level, successful recruitment/talent strategies
2. Capacity to enhance local education and programming efforts including technical, regional, liberal arts colleges exposure to companies that are hiring, e.g. Career Cruising Platforms
3. Knowledge to expand the human resource capacity of companies, including on-line applications
4. Accessing workforce development programming available to special populations or training

### Structure of Course:

- Briefing Model - online (live webinar or on-demand)
- Comprehensive Model - in person class (1/2 day)

### Deliverables:

Participants will be able to improve the capacity of the community to put together a strategy to help companies attract, retain and target talent more precisely and effectively.

**Instructors:** Experienced workforce development or human resource consultants or professionals that could include Economic Development professionals.

## BUSINESS RETENTION & EXPANSION DEVELOPMENT

### Introduction:

Business Retention & Expansion (BR&E) programs unite businesses and the community to lead efforts to improve and sustain a positive business climate, support employment strategies, to connect local and regional resources to expansion projects. Building relationships is a key component to any successful BR|E programs as companies open up to share their challenges and success stories, BR|E managers seek to understand company performance as a means to improve the region's economic health. BR|E uncovers weaknesses and strengths in the economy and plugs resources where they are available and critically needed.

### Topics/Content:

1. Creating a BR&E program in a rural, suburban or urban setting
2. Establishing a program
  - Organizing, execution strategies
  - Raising resources for a Program
3. Model communities running successful programs
4. Government, business, education and economic development agency role in execution
5. Business Visitation
  - Selection of businesses to be surveyed
  - Survey Tools
  - Tracking/measurement
6. Technical Assistance:
  - Workforce development
  - New markets
  - Supply chain
  - Succession planning
7. Industry roundtable events/cluster opportunities
8. Economic Development Tools for BR|E
  - Marketing
  - Assessments

### Training Objectives:

1. Knowledge of current BR&E practices, resources at the state and local level, practical strategies for successful execution
2. Capacity to enhance programming efforts including marketing, outreach and evaluation methods
3. Knowledge to launch a program or improve an existing program.

### Structure of Course:

Two options: online (live webinar or on-demand) and in person class (1/2 day) scheduled around WEDA Conference dates/events

### Deliverables:

Participants will be able to improve the capacity of the community to understand value of BR|E programs and understand how to launch or improve programs.

### Instructors:

Synchronist, Executive Plus consultants, ED practitioners, Main Street Directors and government departments that manage BR|E programs

## LEVERAGING DEVELOPMENT AGREEMENTS

### Introduction:

Economic developers, municipal staff and elected officials alike face development agreements routinely as they navigate bringing a development opportunity to fruition. They are integral to structuring a deal, getting everyone on the same page, building in accountability and assuring performance. Perhaps due to discomfort, expertise concerns or fear, few take the time necessary to understand the implications and challenges of what legal assembles. Others get too far into the weeds or expect too much of the agreements. This seminar is designed to cut through the complexity and offer a practical approach to leveraging development agreements for mutual success.

### Topics/Content:

1. Deal flow
  - a. Stages of a deal
  - b. Clear indicators on movement between stages
  - c. Guidelines on managing deal flow
  - d. Guidelines on managing projects through the process
  - e. Salesforce as a tool
2. Prioritizing Deals
  - a. Strategy based
  - b. ROI based
  - c. Impact based
3. Types of Agreements & components
  - a. Pre-Development / MOU's
    - i. List components demonstrating with examples
  - b. Development Agreements
    - i. List components demonstrating with examples
4. Practical Advice
  - a. Tips
  - b. Cautions
  - c. When and how to leverage and manage legal counsel

### Training Objectives:

1. Articulate the deal flow process
2. Understand how to leverage a sources and uses chart in structuring a deal
3. Prioritize deals
4. Identify the types of agreements and when they are best used
5. Comfortably articulate the components of agreements
6. Assemble a draft agreement using provided template and components

### Structure of Course:

- Academy Briefing - Webinar (upto 90 minutes in length)
- Academy Comprehensive (½ day training)  
Capstone Group activity whereby a case is presented and groups respond by plugging and playing into a draft MOU

### Deliverables:

Participants will walk away with a deal structuring handbook of case examples, tips and personal notes. They will also receive a few templates they can use as a basis for customizing and discussion in their home communities.

**Instructors:** Legal experts that have experience in these specific areas of practice

## BROWNFIELD REDEVELOPMENT

### Introduction:

Many communities mistakenly feel they have no brownfield sites to “rehabilitate” while others engage in brownfield redevelopment skillfully and for projects some would be surprised to learn are considered a brownfield opportunity. The rewards of success are great. More access to outside resources, leveraging existing infrastructure and community assets, enhanced tax base and job producing business and catalytic community transformation. How does municipal staff or an elected official navigate past the fear of leveraging brownfields for higher and better opportunity? This seminar will demystify and generate confidence around the otherwise complex but very lucrative potential of brownfield redevelopment.

### Topics/Content:

1. “Diamonds in the Rough” – How to Spot and Leverage a Choice Opportunity
2. Making the Case – How to overcome fear and use free resources to demonstrate potential ROI
3. Limiting Municipal Liability
4. Prioritizing Multiple Opportunities – Criteria and strategies for selecting impactful projects & staging more complex ones
5. The Assessment and Remediation Process – Step-by-Step Guide
6. Strategies and Techniques for Overcoming Remediation Barriers and Minimizing Costs
7. Packaging Sites for and Pitching to Redevelopers / End-Users

### Training Objectives:

1. Common language around leveraging brownfields
2. Practical approach to identifying the “diamonds in the rough”
3. Experience with accessing and leveraging available decision-making tools
4. Top-level strategies for transforming site issues into competitive advantage
5. Techniques for packaging & pitching the overall redevelopment project

### Structure of Course:

Academy Briefing (webinar) online (live webinar or on-demand)

Academy Comprehensive - in person class (1/2 day)

The Comprehensive Course would a capstone group activity whereby participants break up into groups and use an Excel workbook and online tools to evaluate 2 brownfield sites, choose the best opportunity, graphically create an approach to remediation and redevelopment, run the numbers and compete in a “shark-tank” style game pitching their project to redevelopers. Fun!

### Deliverables:

Participants will walk away with an Excel workbook that includes case examples, tools and templates for evaluating and working a brownfield project opportunity

### Eligible Instructors:

Environmental engineering and planning firms with expertise in brownfield redevelopment and a proven track-record of leading success.

## FISCAL AND ECONOMIC IMPACT ANALYSIS

### Introduction:

From local meetings to congress, buzz and debate around development incentives and public investments is especially fierce. Economic developers and municipal officials are called upon today more than ever to justify investments, demonstrate ROI, convey the WIFM (What's in it for me?), and decide how to maximize scarce resources. Too often gut and passions drive these conversations and choices. This seminar will help participants take a data-driven approach and gain comfort around understanding and assessing impacts.

### Topics/Content:

1. Economic Impact Analysis
  - a. Defining
  - b. Components
  - c. Models
  - d. Application
  - e. Do's and Don'ts
2. Fiscal Impact Analysis
  - a. Defining
  - b. Components
  - c. Models
  - d. Application
  - e. Do's and Don'ts
3. Service Provider Options
  - a. Options for generating reports
  - b. Pros and cons of each
  - c. What to consider and look for in choosing a provider
4. Case Project (Given or Community Specific)
  - a. Define the questions that need answering
  - b. Select the appropriate tool(s)
  - c. Run the project through a model (or two)
  - d. Interpret the resulting report
  - e. Make a case for or against public investment in the project

### Training Objectives:

1. Articulate the difference between economic and fiscal impact analysis
2. Understand the opportunities and challenges of each
3. Choose what situations call for which approach
4. Understand the differences and pros / cons of various models
5. Interpret and make use of reports coming out of select models

### Structure of Course:

- Academy Briefing - online (90-minute live webinar or on-demand);
- Academy Comprehensive - in person class (1/2 day)

### Deliverables:

Participants will walk away with a "handbook" that captures key points and tips from the course. It would also include sample reports and guidance for using and interpreting them. Ideally participants would be given access during the seminar to a couple of sample online tools where they can run a project for their community through the tool. Would require advance work by participants to gather or have at hand a sample project

### Eligible Instructors:

National firms with recognized expertise and practical tools / services to offer companies in this space.



## REQUEST FOR QUALIFICATIONS SUBMISSION

*Please use this form – information will be used as part of the certification process for credits  
 Separate forms are needed for “Briefing” or “Comprehensive” submissions*

Organization Contact Person and Contact Information	
General Organization Information (i.e. website address, short description of organization, etc.)	
Academy Course Model <i>(Please select one)</i>	Briefing (60 to 90 minute webinar) or Comprehensive (1/2 workshop)
Name of Academy Course:	
Technology Required (LCD projector, flip chart, etc.)	
Training Objectives	
Description of Session or Course - its relevance to attendees (What will you learn and why is it important)  <b>(brief is better but no more than 300 words)</b>	
Training Deliverables	
<b>Instructors' Names</b>  <i>You may include up to three instructors per session.</i> Instructors' Biographies, including current professional title and notable achievements that indicate required level of expertise <b>(brief is better but no more than 300 words for each one. Please explain what portion of the content will be delivered by each presenter)</b>	
Instructors' Names #2	
Instructors' Names #3	
Location (city, state) of each Instructor	

## Financial Model

The Wisconsin Economic Development Academy is seeking to be a resource for both the students of the classes but also the instructors of the courses. The following model has been developed to discuss how profits generated from the courses will be managed.

### Administration:

- All registration fees would be collected by WEDA
- Course material expenses to be documented by Instructor or sent to WEDA for implementation – budget for expenses developed prior to setting price of course
- Fees for the course will be determined by the selected Instructor and WEDA's Executive Director
- Membership status of the Instructor will be finalized prior to implementation of any marketing of the course.

### Proposed Academy Tuition Range:

- Briefings (Webinars): \$50 - \$95.00 (WEDA and Instructor to agree on cost of course based on expenses)
- Comprehensive: \$175 - \$225 (WEDA and Instructor to agree on cost of course based on expenses)

### Expenses:

Due to the different costs of technology or space, the fee structure will be finalized after receiving the following cost estimates:

- Reproduction of course materials
- Room rental and refreshment
- Proximity of venue to instructor – travel expenses (limited overnight stays allowed)
- WEDA administration fee (if appropriate – right now WEDC would provide an administrative stipend, but WEDA should reserve the right to add in that fee)
- WEDA Cost of technology (if webinar)

### Academy Profit Sharing Model with Instructors

- Instructors that are WEDA Members at the Silver level (\$3500) receive 65% of the profit from the course
- Instructors that are WEDA Members at the Bronze level (\$1950) receive 50% of the profit from the course
- Instructors that are WEDA Members but are below the Bronze level receive 40% of the profit from the course
- Instructors that are Non-WEDA Members receive 25% of the profit from the course

**Please note:** *This revenue model is only for the Economic Development courses outlined in this RFQ. This model will not be used for the Basic Economic Development Course or WEDA Conferences.*

## RFQ Evaluation Criteria

The Wisconsin Economic Development Association's (WEDA) Academy Committee in tandem with WEDA's Executive Director ask that certain criteria be met by our instructors, including an appropriate background, displaying technical expertise, and demonstrating reasonable level of availability to follow through on the training deliverables. WEDA is also gauging the instructor's willingness to be included for subsequent trainings to provide a consistent and sustainable training program.

Below is the evaluation criteria and the guidelines in awarding points to the questions outlined in the RFQ submission form to select the best possible instructor to be offered by the Academy. Should multiple instructors respond to the same topics, the evaluation will assist in securing the most qualified, available and capable instructor.

The scoring for all seven questions in the RFQ Submission form is below, a maximum score is 30 points:

1. Please provide name, address, e-mail address, telephone number, and title for purposes of this RFQ. **2 Points**
2. Topics or categories (webinar vs. ½ day) for which Instructor is submitting qualifications under this RFQ **2 Points for topic and 1 Point for each format**
3. Resume, curriculum vitae, linked-in profile or other material to offer evidence of a background capable of conveying the topic(s) selected for instruction. **5 Points**
4. Provide the similar projects or opportunities that the instructor has experienced that correlate to the instructor's ability to teach said topic(s). **5 Points**
5. Is the instructor who is responding to this RFQ the only instructor to be named to this RFQ? If there are others, please supply their background profiles and explain their role in the training. **5 Points**
6. Please provide examples, case studies, tools that will be conveyed within the training that demonstrate the instructor's ability to convey the material around said topic(s). **5 Points**
7. Please describe current projects and commitments that may enhance or interfere with availability to commit to trainings? Response may be specific such as days/times/times of year for availability versus general availability to commit to the trainings. **5 Points**