



QUESTIONS & RESPONSES

#01

RFP or RFQ / TITLE **070421 | Strategic Plan Consultant Services**

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ITEM #	PROPOSER QUESTIONS	PORT RESPONSES
1	Is the strategic planning effort and deliverables for: a) the Port of Tacoma, its businesses and assets; b) the Northwest Seaport Alliance; or c) both?	Port of Tacoma only.
2	If the focus is the Port of Tacoma, which if any consideration of the scope of service tasks (Tasks 1- 9), analyses and assessments contained in the Scope of Services should address the Northwest Seaport Alliance?	This study will focus on Port of Tacoma properties and potential new business lines
3	Should any of the Task 3 Stakeholder Interviews; Task 4 Community Outreach, Task 5 Commission Meetings; Task 6 Commission Retreat; and or Task 7B Stakeholder Open House efforts include members of the Northwest Seaport Alliance Commissioners or Senior Managers?	No, the study is focused on the Port of Tacoma and will not include any of the NWSA leased properties
4	Task 1, pages 2 & 3: please identify who are the individual members of the Port Leadership and the Port's Executive Team?	TBD
5	Task 1, page 3: to whom does the "Group" refer? Is this the Port Leadership?	Consultant and Port Leadership as stated in Task 1

6	<p>Task 1, page 3 states: "<i>The Task Force will conduct much of the work on the Strategic Plan</i> ". Will the Task Force be responsible for preparing the market, competitive, economic, forecasting and financial analyses and modeling that are typical components of a strategic planning effort?</p>	<p>See Task 5 - Consultant will prepare a "Strategic Options Paper"</p>
7	<p>Will the Project Management Team be responsible for:</p> <ol style="list-style-type: none"> Defining the work tasks to be completed? Managing the Task Force, monitoring and reviewing and commenting on the Task Force's work in progress? Defining the Task Force's deliverables? Setting the Task Force's priorities and addressing conflicts which inevitably arise between Task Force members' strategic planning responsibilities/obligations and their regular responsibilities/obligations within the Port of Tacoma organization? 	<p>a. Scope will define work tasks; b. "The Project Management Team will consist of 2-4 Port staff. This small and efficient subset of the Task Force will manage week-to-week progress and tasks, review materials prepared by Consultant for meetings, and edit the Strategic Plan between Task Force meetings." c. & d. Task 1 specifies "The Group (Consultant and Port Leadership) will agree on protocols for communication among project team members and develop a plan for communicating internally over the course of the project. The communication plan will address public communication and outreach strategy in collaboration with the Project Management Team and the Port's Public Affairs staff. " Further Task 1 specifies that the Commission will provide guidance.</p>
8	<p>What are the respective roles and responsibilities of the Consultant vs the Task Force?</p>	<p>The Consultant's role is facilitator and the Task Force is the primary advisory body</p>
9	<p>Task 3, page 4: is the Consultant responsible for preparing an updated SWOT analysis for the Port of Tacoma and or the Northwest Seaport Alliance?</p>	<p>This RFP is focused on the Port of Tacoma only. We will share results of the previous SWOT analysis with the selected consultant, and will consider recommendations to augment it if the task can be accomplished within the indicated timeframe.</p>

10	<p>Task 3, page 4: what are the respective roles and responsibilities of the Consultant and the Project Management Team in preparing and delivering the Strategic Situation Report?</p>	<p>The Consultant's role as outlined is to deliver a Draft Strategic Situation Report. "Consultant will assess the Port's current situation and strategic opportunities and the most recent business SWOT analysis, all of which will inform development of the Strategic Plan." Further, "Task 5: Strategic Options and Strategic Plan Outline" outlines roles as follows: "The Port's Strategic Plan will be developed iteratively, over several drafts, including input from stakeholders and community outreach. Consultant will prepare a Strategic Options paper, based on the findings from the Strategic Situation Assessment, financial review, and Commission feedback on the Assessment. Consultant will then facilitate a workshop with the Task Force to discuss and refine the strategic options and potential goal areas identified. Following the workshop, Consultant will prepare an annotated outline of the Strategic Plan and submit it to the Project Management Team for review and comment. As part of this Task, Consultant will prepare for and attend a briefing to the Port Commission to obtain input on the initial Strategic Plan's direction, goals, and action strategies."</p>
11	<p>Task 4 Community Outreach Meetings: a total of six meeting are to be scheduled and conducted. Are these meetings:</p> <ol style="list-style-type: none"> <li data-bbox="169 1142 768 1290">To be conducted sequentially and periodically over the course of the strategic planning process at key milestones and involve the same attendees; or, <li data-bbox="169 1311 736 1657">Are they to be conducted in parallel at a particular point in time during the strategic planning process, for example after the completion of the Strategic Situation Report; involve different segments of the Community [for example a port stakeholders session, an elected officials session, a planning agency session, an environmental community session, etc.]; and cover the same topics? 	<p>We are looking to those responding to the RFP to outline the best strategy for this Strategic Plan Update.</p>

12	<p>Task 5 page 5: who is responsible for preparing and delivering:</p> <ol style="list-style-type: none"> The Strategic Options Paper (RFP indicates it is the Consultant)? The first Strategic Plan Draft? The publicly available Commission briefing materials? 	<p>" Task 5: Strategic Options and Strategic Plan Outline</p> <p>The Port's Strategic Plan will be developed iteratively, over several drafts, including input from stakeholders and community outreach. Consultant will prepare a Strategic Options paper, based on the findings from the Strategic Situation Assessment, financial review, and Commission feedback on the Assessment. Consultant will then facilitate a workshop with the Task Force to discuss and refine the strategic options and potential goal areas identified. Following the workshop, Consultant will prepare an annotated outline of the Strategic Plan and submit it to the Project Management Team for review and comment. As part of this Task, Consultant will prepare for and attend a briefing to the Port Commission to obtain input on the initial Strategic Plan's direction, goals, and action strategies. Deliverables:</p> <ul style="list-style-type: none"> Strategic Options, first Draft Strategic Plan, and publicly available Commission briefing materials. Commission Meetings: Port Commission briefing #3." <p>Presentation of these materials will be done by Port Leadership.</p>
13	<p>Task 6, pages 5 & 6: Is the Consultant responsible, with input from the Project Management Team, for the Task 6 deliverables: draft and final retreat agenda, discussion materials and summary of comments?</p>	<p>The Consultant's role is to facilitate the development of these deliverables with guidance from those key groups, stakeholders, and the staff team outlined in the RFP.</p>
14	<p>Task 7B, page 6 first paragraph states, "<i>Location will be determined by the Group.</i>" To whom does the Group refer? Will the location be within the general area of Tacoma and Seattle?</p>	<p>The group is Consultant and Port Leadership as stated in Task 1. Meetings will be held in Pierce County.</p>

15	<p>Task 8, page 7:</p> <p>a. Who will determine the format for the Final Strategic Plan and when will it be determined? There is significantly more effort involved in preparing a strategic plan in WORD or other prose related format than in an executive style format (e.g. PowerPoint).</p> <p>b. Would it be possible to obtain a sample Implementation Matrix from a previous plan?</p> <p>c. Is the Consultant or the Project Management Team/Task Force responsible for preparing the Final Strategic Plan and Implementation Matrix?</p>	<p>a. The final Strategic Plan will be in a format similar to the current Strategic Plan which can be found at: http://portoftacoma.com/about/strategic-plan Background papers and other deliverables will be in WORD; b. An example of level of detail is included as an attachment; c. Consultant based on Port branding standards</p>
16	<p>Task 9: Board Adoption and Plan Layout/Design page 7 states: <i>"The final Plan will be an attractively designed document approved and accepted by the Port...."</i> Is the document design synonymous with the format for the Strategic Plan referenced under Task 8 (see Questions 15.a-c immediately above)?</p>	<p>Yes</p>
17	<p>Paragraph E on page 8 states <i>"The written proposals should be prepared in the same sequential order of proposal criteria as outlined below"</i></p> <p>a. Are we correct in assuming the main body of the proposal should sequentially address items 1-3 listed on the bottom of page 8 and the top of page 9 under the heading INITIAL EVALUATION PHASE?</p> <p>b. Is there a specific format to follow in preparing the separate Compensation Document?</p> <p>c. Are we correct in understanding the description of the work plan, which addresses the Port of Tacoma's nine work tasks, is to be included under Item #2 Project Approach Narrative?</p> <p>d. Should the Consultant's submittal include references? If so should they be provided at the end of the document?</p>	<p>a. sequential order of items #1-4 listed on pages 8-9; b. no, c. Yes - could be discussed in other sections as well; d. yes, yes</p>
18	<p>Are international firms allowed to submit a proposal? And if so, is a local partner required?</p>	<p>This is an open, competitive RFP</p>

19	Is there an incumbent who previously worked with the Port on a Strategic Plan? If so, who is the firm?	Berk and Associates completed the last Port of Tacoma Strategic Plan
20	What is the Port's budget for this work?	TBD based on proposals, total compensation for the prior Strategic Plan was \$145,177.92 (2011).
21	<p>Compensation, page 9: This paragraph states, "<i>All rates quoted shall be: a) Fully burdened, including, but not limited to, per diem, administrative overhead, travel, lodging, and transportation (all direct/indirect expenses included);</i>". The scope of services includes a large number of interviews, progress meetings, Commission briefings, workshops and an open house which occur periodically over the period October 2016-April 2017. Airfare, lodging and rental car rates tend to vary significantly by time of day (airfares), day of week and month. It is not possible to reasonably predict the associated travel, lodging and transportation costs associated with the project unless a firm is local and therefore incurs no travel and lodging costs. Is Clause 4.a applicable to this procurement and therefore firms will be considered not responsive under this clause if they include a separate expense budget in their submissions?</p>	<p>Yes, Clause 4.a is applicable to this procurement. Firms that do not follow submittal requirements will be considered non-responsive.</p>

2016 POT STRATEGIC PLAN OVERVIEW

Strategic Objectives	Initiative	Lead	NWSA*	POT
GOAL 1: ENHANCE THE PORT'S COMPETITIVE POSITION				
A. IMPROVE PORT BUSINESS ASSETS TO MEET MARKET DEMAND	1) Redevelop the General Central Peninsula and other terminal complexes to increase container throughput and respond to container industry changes. 2) Make repairs identified in previous asset management initiative. 3) Facilitate collaboration between South Blair terminals to increase container throughput and respond to container industry changes.	Zhu Chamberlain Zhu	1.A.1 X 1.A.4	
B. IMPROVE EFFICIENCY AND COST COMPETITIVENESS OF THE SUPPLY CHAIN	1) Improve efficiency of the Tideflats and rail system. 2) Facilitate development of strategic projects with the mainline railroads in collaboration with relevant federal and state government agencies, public ports and other stakeholders. 3) Work in partnership with ILWU and terminal operators to identify efficiency opportunities that safely increase productivity and improve the Port's service delivery and competitiveness. 4) Work with the Puget Sound Pilots Association, the Pacific Merchant Shipping Association and the Washington State Pilotage Commission to promote safe, reliable and cost-competitive pilotage services. 5) Establish a dynamic, responsive, 'state of the art' Operations Service Center emphasizing collaborative planning, and information delivery and communication tools to deliver 'best in class' service delivery for all Port users.	Esterbrook Esterbrook Stoker Esterbrook Esterbrook	1.B.1 1.B.1 1.B.3 1.B.3 1.B.3	
C. ADVANCE THE PORT'S MARKET POSITION IN THE INTERNATIONAL SHIPPING INDUSTRY	1) Formalize a comprehensive Signature Customer Care Program 2) Adapt marketing strategies in response to industry trends 3) Enhance coordination with the Puyallup Tribe and other trade and economic development organizations to facilitate new business transactions 4) Pursue legislative actions that improve the Harbor Maintenance Tax	Zhu Zhu Zhu Eagan		complete 1.C.1 3.A.2 1.C.2
GOAL 2: PROVIDE RELIABLE AND EFFICIENT REGIONAL AND LOCAL INFRASTRUCTURE CONNECTIONS				
A. ENHANCE PUBLIC INFRASTRUCTURE	1) Provide regional leadership in securing funds needed to complete SR 167 2) In partnership with affected parties, improve the condition and operation of Port of Tacoma Road	Eagan Chamberlain	2.A.2 X	complete
B. IMPROVE THE PORT'S INFRASTRUCTURE	1) Develop a long-range Port land use and transportation plan to support the Port's future business growth	Jordan	2.A.1	
GOAL 3: IMPROVE THE PORT'S FINANCIAL POSITION				
A. INCREASE REVENUE THROUGH GROWTH AND DIVERSIFICATION	1) Facilitate creation of new bulk business 2) Capture business opportunities that expand the real estate portfolio and improve utilization of Port assets, and achieve targeted rates of return 3) Develop a comprehensive business strategy to support the Port's Alaska business	Esterbrook Zhu Zhu	3.A.1 X 3.A.2	
B. IMPROVE PORT'S POSITION OF ASSET VALUE TO LEVEL OF DEBT	1) Update debt management plan	Morrison		X
C. MANAGE EXPENSES CONSISTENT WITH CHANGES IN REVENUE	1) Adjust Port's business and operating models to increase profit 2) Implement programs to minimize the impact of cost increases associated with health care 3) Define adequate levels of service and create efficiencies in the Port's Security Department to support the business objectives of the Port	Zhu West Cooper		Hold X X

* Column identifies which initiatives will not be lead through the NWSA Strategic Business Plan.

Last Updated: Thursday, September 01, 2016

2016 POT STRATEGIC PLAN OVERVIEW

Strategic Objectives	Initiative	Lead	NWSA	POT
GOAL 4: INCREASE ORGANIZATIONAL CAPABILITIES				
A. ENHANCE EMPLOYEE ENGAGEMENT	1) Strengthen the Port's performance management system to support employee growth	West		X
	2) Develop and implement a comprehensive Port training program that aligns individual training with Port objectives and employee development	West		X
	3) Improve communication of information within the Port	Mattina		complete
	4) Reduce work-related injuries	Meyer		X
B. IMPROVE EFFICIENCY & RELIABILITY OF INTERNAL PROCESSES TO INCREASE VALUE FOR OUR CUSTOMERS AND STAFF	1) Standardize analysis and decision-making tools for the Port	Galeno		X
	2) Identify, document, and implement improvements to the process and tools that support procurement of goods and services, receipt, invoicing, payment, and reporting activities	Galeno		X
	3) Standardize and implement an electronic record storage and retrieval structure that optimizes the use of electronic records	Givens		X
GOAL 5: ADVANCE ENVIRONMENTAL STEWARDSHIP				
A. IDENTIFY & ADDRESS ENVIRONMENTAL ISSUES IN ADVANCE OF PLANNED DEVELOPMENT	1) Implement cleanup actions on priority contaminated properties to support the Port's business opportunities	Jordan		X
	2) Implement a habitat mitigation plan	Jordan		X
B. PARTNER TO FIND INNOVATIVE SOLUTIONS TO OUR CUSTOMERS' ENVIRONMENTAL CHALLENGES	1) Identify and develop maritime industrial stormwater treatment best management practices	Jordan	4.A.1	
	2) Develop a maritime industrial-focused Environmental Stewardship Sustainability Program	Jordan		X
C. CONTINUOUSLY IMPROVE OPERATIONAL EFFICIENCY & EMISSION REDUCTIONS	1) Continue to implement the Northwest Ports CI	Jordan	4.B.1	
	2) Clean Air Strategy			
	3) Transition to the new generation of efficient systems to save energy costs and promote cost effective, renewable energy use	Jordan		X
GOAL 6: STRENGTHEN THE PORT'S COMMUNITY CONNECTIONS				
A. TARGET THE PORT'S OUTREACH EFFORTS TO MAINTAIN AND BUILD COMMUNITY SUPPORT	1) Strengthen relationships with civic and elected leaders in communities affected by the Port's activities	Eagan		X
	2) Increase the public's understanding about the Port and its work	Mattina		X
	3) Execute a Corporate Social Responsibility (CSR) Program	Eagan/ Cooper		X
B. PROMOTE AND ADVANCE REGIONAL ECONOMIC DEVELOPMENT PRIORITIES THROUGH STRATEGIC PARTNERSHIPS	1) Update and convey data demonstrating the economic value of ports to our state and local economy			complete

* Column identifies which initiatives will not be lead through the NWSA Strategic Business Plan.

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