REGIONAL OPPORTUNITY INITIATIVES

INTRODUCTION

About Regional Opportunity Initiatives, Inc. (ROI)

Regional Opportunity Initiatives, Inc. (ROI) is a 501(c)(3) organization committed to advancing economic and community prosperity in the Indiana Uplands region. ROI is seeking proposals from qualified professionals who are knowledgeable in research and development, planning and data analysis to provide Comprehensive Economic Development Strategy (CEDS) planning services for the counties of Brown, Monroe and Owen in the Uplands region. Brown, Monroe and Owen counties are seeking official designation as an Economic Development District (EDD) from the U.S. Department of Economic Administration (EDA). ROI is serving as the regional convener for this effort amongst the three counties and will be the primary contact for this contract.

Background

Regional Opportunities Initiatives (ROI) is a regional nonprofit intermediary that drives economic development, placemaking and workforce attraction and retention work in our 11-county rural region of Southwest Indiana, also referred to as the Uplands. ROI wants to ensure that all members of our region have equal access to opportunities for individuals and their families.

Critical to regional growth is a commitment to collaboration and regionalism that, over the last 12 years, has coalesced stakeholders around a cohesive regional identity. In 2014, the Uplands region was home to several unique assets upon which to anchor its economy but was also faced with significant economic challenges that needed to be overcome. Recognizing that economic stagnation would be the ultimate downfall of the region, the Uplands undertook bold steps to change the trajectory of the economy and the prosperity of its citizens.

Civic leaders were faced with a sobering economic reality as they sought to develop an economic strategy in 2014—the Indiana Uplands region had lost 1.1 percent of its employment base during the 2001-2012 period. The decision to pursue an innovation-driven economic cluster strategy was rooted in the reality that the region was losing employment opportunities, and many citizens were being left behind. In reaction to this economic reality, the first bold initiative of the 2014 economic development strategy was targeting key industry clusters for which the region had a comparative advantage and focusing resources, time, and attention on

further developing these clusters through expansion, retention, and attraction efforts. Today, the Uplands region is experiencing a very different economic reality. Between 2012 and 2019, the economy gained 11,155 jobs, a 7.5 percent increase in employment throughout the region. More than 61 percent of these jobs are attributable to the region's targeted industry clusters (6,825 jobs). Furthermore, while the Uplands region experienced a period of economic decline as a result of COVID, losing 5,349 jobs between 2019 and 2020, a 3.4 percent decline, the targeted industry clusters were more resilient, representing 35 percent of the region's job loss or 1,892 jobs (806 of them within the hospitality and tourism cluster). The 2014 economic development strategy has paid significant dividends to the Indiana Uplands economy as these industry clusters have grown and become even more vital today, driving economic and community prosperity throughout the region.

What is a Comprehensive Economic Development Strategy (CEDS)?
The CEDS contributes to effective economic development in the Uplands region's towns, cities and counties through a locally-based, regionally-driven economic development planning process. Economic development planning, as implemented through the CEDS, is a cornerstone of the U.S. Economic Development Administration's (EDA) programs, and successfully serves to engage community leaders, level the involvement of the private sector, and establish a strategic blueprint for regional collaboration. The CEDS provides the capacity-building foundation by which the public sector – which works in conjunction with other economic partners, including individuals, firms, and industries – creates the environment for regional economic prosperity.

Simply put, a CEDS is a strategy-driven plan for regional economic development. A CEDS is the result of a regionally-owned planning process designed to build capacity and guide the economic prosperity and resiliency of an area or region.

It is a key component in establishing and maintaining a robust economic ecosystem by building regional capacity (through hard and soft infrastructure) that contributes to individual, firm and community success. The CEDS provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve economic development in the region.

Planning Area
The planning area includes the three counties of Brown, Monroe and Owen in the Uplands region.

RFP Proposal Content

Responses to the RFP should include a detailed work plan that includes, identifies and/or addresses a variety of items including various elements of the new CEDS.

- Overall timelines, schedule, milestones and budget necessary to complete the CEDS
- Staffing and number of hours that will be devoted to each activity needed to complete the CEDS

- Descriptions of the work product that will be produced.
- Collection of data and assessment of needs
- Methods and tools of research, evaluations, forecasting and analysis
- Report preparation and documentation.

This process must meet EDA's requirements for an EDA-funded CEDS, which include a Summary Background, SWOT analysis, Strategic Direction/Action Plan, Evaluation Framework and sections on Economic Resilience, Workforce Development and Equity.

The comprehensive update of the three-county region (Brown, Monroe and Owen) CEDS should:

- Present background and historical information about economic development
- Evaluate the economic conditions of the three-county region
- Identify the three county region's strengths and constraints
- Identify infrastructure needs as well as evaluate the infrastructure inventory
- Evaluate the needs of the three-county region, including a full SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis concerning economic development
- Assess appropriate economic development strategies for the three-county region
- Anticipate the three counties economic development activity, potential future developments, current and future plans and other information that could affect future projects
- Evaluate local and regional labor characteristics; recommend actions to strengthen links between regional educational institutions and employment development providers
- Identify appropriate economic development strategies for the three counties
- In collaboration with Brown, Monroe and Owen, identify the goals and visions for the three-county area
- Set the course for future development actions
- Create a strategic action plan to achieve goals and objectives
- Establish evaluation standards to measure the success of the strategies
- Identify other potential opportunities and issues
- Outline each of the three counties role in recovering from future disruptions and reposition the area to move forward:
    - Ability to navigate federal programs
    - Identify each counties network of partners
    - Prioritize resilient transportation investments
    - Diversifying the Regional Economy
    - Assessing Economic Vulnerabilities
    - Promoting Green Infrastructure
    - Promoting Safe Development
- Provide Resiliency and Disaster Plans
    - The CEDS should address resiliency and recovery in the face of natural disasters and other major economic disruptions in our changing global economy. It should outline ways to:

        - Diversify the three-county area away from a declining sector
        - Deal with the impacts of the loss of a major employer
        - Position the three-county region to withstand and quickly recover from the effects of natural disasters, a changing climate, and other economic shocks
- Identify Funding Opportunities
    - Research and identify federal, state and local funding sources.
    - Identify opportunities for joint development and/or public-private partnerships
- Perform Stakeholder and public outreach
    - ROI and the three counties expect this to be a major element of the project and is open to a variety of methods

Our vision is to have a process whereby key stakeholders are brought together to discuss the issues, trends and opportunities facing the region, and how the region's economy can be moved forward.

Part of our evaluation of RFP responses, will be the strength of the stakeholder and public outreach process proposed by the respondent. Our desire is to have a robust outreach process that informs people of the trends shaping the region and engages them in crafting and advocating for solutions. ROI anticipates that this will involve members of the public, non-profits, educational institutions, governments and the corporate sector. At a minimum, the process will involve the CEDS Strategy Committee (complying with EDA standards)., advisory groups and stakeholder interviews. ROI also anticipates that this process will be iterative and will involve multiple rounds of soliciting input, presenting data/analysis in response to that input and soliciting further input.

This iterative process will inform both the analysis and solution development processes. The consultant may advise on creating a website regarding this project and ROI will maintain the website with basic information about the CEDS process and project-related events.

PLEASE NOTE: The design of both the draft and final CEDS must be in compliance with ROI's visual identify standards. ROI will provide and perform creative direction including draft and final layout, art, photography and illustration direction.

ROI's Role in Supporting CEDS Development

ROI is providing in-kind staff time to complete the CEDS process. ROI staff will help the selected consultant with all aspects of the CEDS planning process. This includes all of the following: local coordination, assisting or hosting stakeholder and public outreach meetings, and plan layout, art, photography, and illustration. In addition, the Luddy School of Informatics is available to provide data support as needed and mutually agreed upon. ROI will act as the point of contact for the Luddy School of

Informatics. The proposal should identify potential areas of assistance that ROI staff can provide.

Supporting Documents, Plans and Initiatives

- ROI – Region on the Rise – Strategic Plan Prepared for READI Indiana-Uplands-Economic-Development-Strategy-2021.pdf
- ROI Housing Study Update Indiana Uplands Housing Study 2024
- All Three County Comprehensive Plans
    - Brown County Brown County Comprehensive Plan
    - Monroe County Monroe County: Comprehensive Plan
    - Owen County 2022 Owen County Comprehensive Plan – Planning the future of Sweet Owen County
- City of Bloomington CEDS equivalent – See attached

Budget

The allocated budget for this scope of work is up to $120,000. The winning proposal will be determined based on a number of factors that work together to create the best value for ROI and the three counties. These include quality, cost, efficiency, qualifications and experience. Applicants are responsible for all costs of developing and submitting a proposal package, interviews or any other bidder costs associated with responding to this solicitation.

Evaluation Criteria

- Qualifications/experience of prime consultant with studies of similar type and size
- Qualifications/experience of subconsultants or team members with studies of similar type and size and/or special expertise beneficial to study
- Demonstration of knowledge of economic development principles and trends
- Indication of sufficient staff for all facets of the CEDS preparation
- Past record of performance on similar projects, please include names and dates of relevant work
- Proposed cost of study and demonstration of commitment for meeting the project budget and schedule.

A selection committee comprised of ROI staff, representatives of the three counties including economic development professionals will review the proposals, conduct the interviews (if needed) and select the project consultant. Interviews (if needed) will be scheduled between December 7-11.

ROI and the counties of Brown, Monroe and Owen may choose not to procure the services of any of the responding applicants to this RFP proposal. ROI and the counties of Brown, Monroe and Owen may withdraw this RFP at any time.

RFP Proposed Schedule

RFP Issue Date ……..	October 30, 2026
Deadline for proposals…….	November 30, 2026
Review by RFP Committee……	December 1-7, 2026
Consultant interviews, if needed…….	December 7-11, 2026
Consultant recommendation determined/approved	December 14, 2026
Project Commencement Date	December 21, 2026
Project Completion Date	August 1, 2027 to ROI and the three counties for final review. August 11, 2027 is the authorized award end date.

ROI's CEDS, Governance, and Deployment

The hired consultant will cooperate and work with ROI and the three county economic development partners of Brown, Monroe and Owen in the preparation and development of the proposed CEDS. After the CEDS is reviewed and approved by the EDA, the three counties and ROI will work to deploy and implement the recommendations and strategies of the plan.

Other RFP Matters

- It is understood that this RFP does not obligate ROI and the counties of Brown, Monroe and Owen to pay any costs incurred by the applicants in the preparation and submission of a proposal or an interview.
- ROI and the counties of Brown, Monroe and Owen may choose not to procure the services of any of the responding applicants to this RFP proposal.
- ROI and the counties of Brown, Monroe and Owen may withdraw this RFP at any time.
- ROI and the three counties of Brown, Monroe and Owen reserve the right to negotiate the terms of the contract including the award amount with the selected applicant prior to entering into a contract.
- As a non-profit, ROI is exempt from income, property and sales tax.
- In accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d-2000-4, ROI hereby notifies all applicants that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, Disadvantaged Business Enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, sex, age, national origin, disability, or income status in consideration of award.
- Upon completion of the CEDS, all data, maps and reports shall be the property of ROI, and the three counties of Brown, Monroe and Owen.
- This is a competitive proposal. Insurance will be required.

DEADLINE FOR PROPOSALS

Proposals must be received no later than 5 p.m. (EST), November 30, 2026.

Send Proposals Via Mail or Email to:

(Proposals must be limited to 30 pages excluding examples of previous CEDS plan). Proposals should be sent via email to Julie Halbig at juliehalbig@regionalopportunityinc.org in .pdf format.

Proposals sent via mail should include 5 hard copies)

Julie Halbig
Vice President of Economic and Community Development
Regional Opportunity Initiatives
100 S. College Avenue, Ste. 240
Bloomington, IN 47404

Questions: Please submit questions in writing to Julie Halbig at juliehalbig@regionalopportunityinc.org