

Request for Proposal: Strategic Planning Consultant

ARIZONA ASSOCIATION FOR ECONOMIC DEVELOPMENT
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Table of Contents

1. INTRODUCTION	2
2. PURPOSE	2
3. ORGANIZATION BACKGROUND	2
3.1 PRIOR STRATEGIC PLANS	2
4. CURRENT STATE	2
4.1 VISION	3
4.2 MISSION.....	3
4.3 CORE PILLARS	3
4.4 PRIMARY ACTIVITIES	3
4.5. STAKEHOLDERS.....	4
5. PROJECT SCOPE & OBJECTIVES.....	4
5.1 TIMELINE.....	6
6. TERMS & CONDITIONS	6
6.1 CONTRACTUAL OBLIGATION	6
6.2 ACCEPTANCE AND SELECTION	7
6.3. EXPENSES.....	7
6.4 CONFIDENTIALITY	7
7. REQUIREMENTS	7
7.1 QUALIFICATIONS	7
7.2 PROPOSAL REQUIREMENTS	8
<i>Company Background</i>	8
<i>Approach</i>	8
<i>Pricing Structure</i>	8
7.3 QUESTIONS AND CLARIFICATIONS.....	9
7.4 PROPOSAL SUBMISSION	9
8. EVALUATION CRITERIA	9
9. SELECTION PROCESS	9

1. INTRODUCTION

The Arizona Association for Economic Development (hereafter referred to as "AAED") is a non-profit, membership-based organization dedicated to serving as the unified voice for economic development professionals across Arizona. We serve as a vital resource for economic development professionals, providing training, advocacy, networking, and information to support sustainable economic growth and prosperity.

2. PURPOSE

AAED is seeking a qualified consultant or consulting firm to facilitate an update of our organization's strategic plan for the period of 2026-2029. This plan will guide our organization's efforts in addressing the evolving economic landscape and ensuring our continued relevance and effectiveness in serving our members and the state.

3. ORGANIZATION BACKGROUND

AAED was founded in 1974 as the Arizona Association of Industrial Development by a small group of economic development professionals and business leaders dedicated to expanding Arizona's industrial and economic base. The name was changed in 1911 to the Arizona Association for Economic Development to reflect the organizations broader mission.

3.1 Prior Strategic Plans

- [2023-2026](#)
- [2020-2023](#) | [Action Plan](#)
- [2016-2017](#)
- [2013-2017](#)

4. CURRENT STATE

AAED is a 501(c)6 non-profit, non-partisan organization with ~450 members across the state including:

- Economic development Practitioners from municipalities, utilities, non-profits, educational institutions, etc.

- Providers such as commercial real estate developers, construction, architects, engineers, marketing, tourism, etc.

4.1 Vision

AAED is the premier organization and most trusted resource for economic development stakeholders committed to promoting a vibrant Arizona economy.

4.2 Mission

The mission of AAED is to serve as Arizona’s unified voice for responsible economic development through professional education, public policy, and collaboration

4.3 Core Pillars

Educate	Advocate	Collaborate
Provide training on economic development topics and offer professional development opportunities to practitioners across the state. AAED is the only organization offering a recognized statewide certification in Arizona economic development.	AAED develops a list of policy priorities for each legislative session that guide our advocacy efforts and those of our professional lobbyist. Additionally, we highlight the wins and challenges of our members and industry at large.	AAED regularly hosts virtual and in-person events to bring economic development professionals together to network, build relationships, and share best practices across communities.

4.4 Primary Activities

Events	Advocacy	Education
(2) multi-day conferences (3) half-day summits (2) member celebrations Smaller mixers/tours	Lunch on Lawn legislative event Contract w/ external professional lobbyist	(7) Academy courses per year towards AZED Pro certification Mentoring program Annual Basic Economic Development Course

4.5. Stakeholders

- **AAED staff** — Paid staff include the CEO, Events & Operations Manager, and Membership Engagement & Development Manager.
- **Executive Committee** — Comprised of the President, President-Elect, Vice President, Secretary/Treasurer and the Past President, the Executive Committee works in concert with the CEO and guides the activities of the board.
- **Board of Directors** — Comprised of 19 voting Directors (mix of Metro & Rural representation) and (up to) 6 Advisory Directors. The Directors maintain the strategic direction of the organization, holding the CEO and Committees accountable for progress to goals.
- **Committee Leaders** — 15 committees with a variety of event and topic focuses. Each Committee has a Chair and at least one Vice Chair that direct and oversee the activities of the committee. Their individual committee plans are based on the organization's strategic plan.
- **Annual Sponsors** — Provide financial support to the organization thoroughly annual contributions.
- **Partners** — Fellow industry organizations that collaborate on activities, events, and legislative priorities.

5. PROJECT SCOPE & OBJECTIVES

The selected consultant will work collaboratively with AAED's Board of Directors, staff, and key stakeholders to:

- **Conduct a thorough assessment of AAED's current state:** This includes analyzing existing programs, services, membership demographics, financial performance, and operational effectiveness.
- **Identify and analyze key trends and challenges impacting economic development in Arizona:** This includes factors such as technological advancements, workforce development, regional disparities, and evolving industry sectors.

- **Facilitate stakeholder engagement:** Conduct interviews, surveys, and focus groups with members, partners, and other relevant stakeholders to gather input and perspectives, particularly:
 - The primary benefits they receive as a member or partner of AAED
 - What aspects of AAED they see as valuable and where are we lacking
 - What factors drive or prevent engagement
 - What they see as AAED's differentiating factor (i.e. our special sauce)

This information would be delivered as a separate report from the final findings/ recommendations.

- **Develop a clear and actionable strategic plan for 2026-2029:** This plan should include:
 - A revised vision and mission statement (if necessary).
 - Clearly defined strategic goals and objectives.
 - Actionable strategies and tactics for achieving the goals.
 - Measurable performance indicators and evaluation methods.
- **Facilitate a strategic planning retreat:** Conduct a one-day retreat with the Board of Directors and key staff to finalize the strategic plan.
- **Provide a final written strategic plan document and presentation:** This document should be comprehensive and well-organized in either an editable PPT or Word Document format. Sharing a Canva link is also permitted but must be able to be owned by AAED once complete. *The consultant is NOT RESPONSIBLE for designing the final published strategic plan document.*
- **Provide guidance on implementation and monitoring:** Offer recommendations and tools for successful implementation and ongoing monitoring of the strategic plan.

5.1 TIMELINE

Below is a suggested timeline based on AAED's desire to have an updated strategic plan ready for distribution by Spring 2026. Exact deadlines will be determined in collaboration with the selected consultant.

Item Description	Deadline
RFP submission window opens	May 23, 2025
Deadline to submit questions	June 20, 2025
RFP deadline	June 28, 2025 by 5:00 PM
Proposal review & consultant interviews	July 18, 2025
AAED Board approves proposal(s)	July 25, 2025
Selected consultant confirmed	July 31, 2025
Project kickoff	August 15, 2025
Data gathering & analysis	September 12, 2025
Strategy development	October 10, 2025
AAED FALL CONFERENCE	October 22-24, 2025
Host strategic planning retreat	November 2025
Plan development & roadmap	December 2025
Final Strategic Plan presentation	January 2026

6. TERMS & CONDITIONS

6.1 Contractual Obligation

- AAED makes no implied or explicit statement to accept or approve any proposal submitted.
- This document should be treated as a request, not an offer from AAED.
- The submission, receipt, and review of your proposal does not obligate AAED in any way to conduct an official business relationship with a vendor or to draw up a contract for such a relationship.
- AAED reserves the right to reject any or all proposals and to negotiate with any consultant regarding the terms and conditions of the engagement.

6.2 Acceptance and Selection

- a) Vendors understand that, in submitting a proposal, AAED has sole discretion on determining which vendor, if any, will be accepted for this project.
- b) Vendor selection will be based on the evaluation criteria indicated in this document.
- c) AAED reserves the right to reject any proposal received from a vendor who has previously failed to perform properly or punctually.
- d) AAED reserves the right to reject any proposal that proves, under investigation, to be incapable of adhering to the process indicated in this RFP.

6.3. Expenses

- a) Vendors are responsible for obtaining, at their sole expense, all information necessary for preparing and, potentially, presenting their proposal.
- b) AAED is not liable for any costs incurred by any vendor in the preparation, presentation, or any other aspect of the proposal received in response to this RFP.

6.4 Confidentiality

All proposals submitted will be treated as confidential.

7. REQUIREMENTS

7.1 Qualifications

AAED seeks a consultant or consulting firm with the following qualifications and experience:

- Demonstrated expertise in strategic planning for non-profit organizations, preferably those related to economic development or membership associations.
- Proven track record of successfully facilitating strategic planning processes with diverse stakeholder groups.
- Strong analytical and research skills (the ability to identify and analyze economic trends and challenges a plus).
- Excellent communication and facilitation skills, including the ability to present complex information clearly and concisely.
- Knowledge of the economic development landscape in Arizona or similar regions a plus.
- Experience in developing measurable performance indicators and evaluation methods.
- Ability to work within a defined budget and timeline.
- Ability to provide references from previous clients.

7.2 Proposal Requirements

All proposals should include answers to the questions indicated in the section below followed by any other documents, if applicable, that are required by this RFP. Responses to these questions should be specific, factual, and to the point.

Company Background

- a) Provide a brief overview of the consultant or consulting firm, including relevant experience and expertise.
- b) List and describe any relationships you have had, either in the past or at present, with AAED staff or Board members.
- c) What are the key differentiators that provide your company with a strategic advantage relative to your competitors?
- d) Include resumes of the key personnel who will be involved in the project, highlighting their relevant experience.
- e) Provide Contact information for at least two previous clients who can attest to the consultant's qualifications and experience.
- f) Please include your rate card broken out by job type and then hourly rate.

Approach

Provide a summary of the approach and timeframe for delivering the requested goods and/or services to AAED. This summary should include the following:

- a) A brief description of how your service will meet AAED needs for this project, including your proposed approach and/or methodology
- b) An estimated timeline of when services can be completed for AAED's purposes
- c) Examples of strategic plans developed for past clients.
- d) Additional diagrams and illustrations with brief descriptions to further explain your intended approach (preferred, but not required)

Pricing Structure

AAED's maximum budget for this proposal is \$30,000. Provide a detailed price proposal with all associated costs necessary to fully deliver the goods and/or services requested. Proposals will be disqualified if pricing is not included or is not within budget.

7.3 Questions and Clarifications

All questions and requests for clarification should be submitted in writing to Katie Hurst at katie@aaed.com **by Friday June 20, 2025**. Responses will be provided to all interested consultants.

7.4 Proposal Submission

Proposals should be submitted electronically to Katie Hurst at katie@aaed.com **no later than Friday, June 27, 2025 by 5:00 PM**. Late submissions will not be considered.

8. Evaluation Criteria

Proposals will be evaluated on each organization's ability to meet or exceed the requirements put forth in this document. At any point in the evaluation process, organizations should be prepared to supply or clarify, in writing, any information required by the evaluation team. By responding to this RFP, each organization agrees to accept the decision of AAED's evaluation team as final. The evaluation will consist of, but not be limited to, the following criteria:

- Understanding of AAED's needs.
- Qualifications and experience of the consultant/firm.
- Understanding of the project scope and proposed approach.
- Clarity and completeness of the proposal.
- Cost-effectiveness.
- References and sample strategic plans.

9. Selection Process

AAED will review all proposals and may conduct interviews with shortlisted consultants. Interviews with finalists would tentatively take place in July. **The selected consultant will be notified the week of July 28, 2025.**