

**GOLDEN LEAF FOUNDATION**  
**REQUEST FOR PROPOSALS**

**For contractor(s) to help develop and to implement a Site Development Program  
for the Golden LEAF Foundation**

**RESPONSES DUE BY NOON, JULY 19, 2021**

**About the Golden LEAF Foundation**

In 1999, the North Carolina General Assembly established The Golden (Long-term Economic Advancement Foundation), Inc. (“Golden LEAF”) to administer funds received by the state under the Master Settlement Agreement with tobacco manufacturers. Golden LEAF is governed by Articles of Incorporation that were approved by the General Assembly. For over twenty years, Golden LEAF has used its funds to build economic opportunity across North Carolina through leadership in grantmaking, collaboration, innovation, and stewardship as an independent and perpetual foundation.

Golden LEAF focuses on funding projects that address critical issues facing rural, tobacco dependent, and economically distressed communities in North Carolina. Efforts include educating students and training workers to meet the demands of employers in rural North Carolina; constructing critical infrastructure necessary to create jobs and expand industry; and addressing needs of the agriculture community and developing new markets and opportunities for North Carolina farmers.

Golden LEAF is governed by a 15-member board of directors that is appointed by the North Carolina Governor, Speaker of the House, and President Pro Tem of the Senate. Its staff of 18 is led by President and Chief Executive Officer Scott T. Hamilton. Golden LEAF’s office is in Rocky Mount, North Carolina.

**The Site Development Program**

Golden LEAF recently completed a strategic planning process, during which the Golden LEAF Board of Directors identified establishment of industrial sites as a key opportunity and challenge for economic success for rural and economically distressed communities in North Carolina.

In response, Golden LEAF is creating a new Site Development Program through which it will make grants to support identification and evaluation of potential industrial sites, extension of infrastructure to industrial sites and limited improvement of publicly owned sites.

Golden LEAF is finalizing the details of the Site Development Program and will engage the successful candidate(s) selected through this RFP process in that effort and in the implementation of the program. Golden LEAF anticipates that the Site Development Program will include the following key components, which will be funded by Golden LEAF:

- 1) Site identification: Identification of sites for potential industrial development in those communities with a limited inventory of sites;

- 2) Due diligence: Assessments to confirm that publicly owned or publicly controlled sites are promising candidates for development, e.g., environmental, geotechnical, wetland delineation, infrastructure location, etc.;
- 3) Infrastructure and Site Development: Extension of public infrastructure (water, sewer, roads, etc.) to publicly owned or publicly controlled sites and limited clearing and rough grading of publicly owned sites.

Golden LEAF also expects that the program will incorporate these elements and considerations, among others:

- 1) Preference for economically distressed communities (Tier 1 and Tier 2 counties), including a sliding matching requirement;
- 2) Assessment of how the industrial site under consideration fits into the community's economic development strategy, e.g., commitment of resources to maintain and market the site, whether there are other sites already available in the community, etc.
- 3) Coordination with site development and site certification programs in North Carolina, such as the North Carolina Certified Sites Program, the Duke Energy Site Readiness Program, the Electricities SmartSite Program, the North Carolina Railroad Build Ready Sites Program, North Carolina's Industrial Development Fund, and others;
- 4) A process for evaluating attractiveness of sites for potential businesses to identify sites more likely to attract a client;
- 5) Two award cycles annually, with the first awards made in December 2021, and an annual budget of \$10 million.

### **Request for Proposals and Scope of Work**

Golden LEAF is seeking proposals from qualified organizations to work with Golden LEAF to finalize the Site Development Program and to provide technical assistance in the review of proposals. Development of all processes, requirements, guidelines, etc., will be completed in collaboration with Golden LEAF staff, and the Golden LEAF Board of Directors will make all decisions about the final program elements and funding of projects. Golden LEAF expects the role to include the following scope of work.

- 1) Providing insight and feedback regarding program elements and assistance to Golden LEAF staff to develop the technical requirements of the program, including:
  - a) the criteria to be assessed to determine sites that appear to be good candidates for economic development in the community, with sensitivity to what industrial development opportunities are likely in the community;
  - b) the elements of due diligence that should be included to verify which sites are good candidates for development;
  - c) a process for objective assessment of characteristics of sites to determine which are strong candidates for development and therefore also for funding for due diligence and for construction of infrastructure and similar costs.
- 2) For recipients of funding for site identification, completing the work to identify the sites by developing or reviewing information such as industries likely to choose to locate in a community and the site requirements of those industries, GIS data, land ownership records, images of sites, etc.;

- 3) For proposals seeking funding for due diligence or for development of a specific site, review and assessment of existing technical reports and information to determine what elements of due diligence for a site have been completed satisfactorily and which are still needed;
- 4) For proposals seeking funding for due diligence or for development of a specific site, objective assessment of the attractiveness of the site for industrial development, which Golden LEAF will consider when comparing proposals for funding and making funding decisions;
- 5) Undertaking additional or different activities to support the Site Development Program.

## **Qualifications**

Golden LEAF seeks a candidate with demonstrated understanding of Golden LEAF's mission and understanding of the challenges promoting economic development in rural and economically distressed areas of North Carolina.

The successful candidate should also possess the following qualifications and characteristics:

- 1) Familiarity with challenges arising in site development in rural and economically distressed areas of North Carolina and the ability to effectively complete the scope of work despite those challenges, including limited resources of communities and limited opportunities for economic development;
- 2) Technical skills and experience necessary to review and assess reports commonly created during the due diligence process and to complete the elements of the scope of work;
- 3) Ability to objectively review a site and apply criteria to determine whether the site is likely to be attractive for industrial development;
- 4) Communication skills necessary to work with communities that may not have experience with industrial site development and related issues;
- 5) Awareness of other site certification and site development programs in North Carolina, gaps in site development funding that the Golden LEAF Site Development Program can address, and opportunities to leverage funding from other resources to enhance the value of Golden LEAF support;
- 6) If selected through this RFP process, capacity to immediately engage with Golden LEAF in the first three weeks of August 2021 to finalize the Site Development Program so that it can be launched in time to receive applications and award the first round of funding in December 2021, and capacity to provide services to assist in review of proposals received in the first round.
- 7) Presence in North Carolina strongly preferred.
- 8) History of successful operations that indicates it will be able to assist with this program in the future.

## **Proposal**

Proposals must include the following:

- 1) Work plan: Address how the applicant would accomplish the elements of the scope of work in this RFP and relevant experience and other considerations that will allow the applicant to be successful completing the scope of work. Golden LEAF will accept proposals from applicants that apply to engage in specific elements of the scope of work, but applicants should be clear about which elements they propose to address.
- 2) Timeline: Confirmation of the applicant's capacity to collaborate with Golden LEAF to complete the program design in early August 2021, and to participate in the review of applications for consideration by the Golden LEAF Board in December 2021.

- 3) Qualifications: Describe the applicant's relevant qualifications, including expertise, knowledge, and experience conducting similar or related work.
- 4) Previous work: Include examples of work performed that is similar to the proposed role.
- 5) References: Include three references of individuals or organizations who can address comparable or relevant work done by the applicant.
- 6) Personnel: Provide information about the key personnel, whether employees of the applicant or contractors, that the applicant expects to be directly involved in the project and descriptions of their roles and qualifications. If a group or affiliation will be involved in the process, indicate which organization or individual will have primary responsibility for implementation of the work and activities each will conduct.
- 7) Budget/cost proposal: A description of the cost of work of the applicant. Because the work will vary depending on factors such as the final program elements and the number of proposals received, applicants should identify the hourly rates associated with work to be performed or, if known, costs per service performed, e.g., a fixed cost for objective assessment of a site for development.

### **Timeline**

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|-----------------------------------|---|
| June 21, 2021                     | RFP issued  |
| July 19, 2021                     | NOON - Deadline for submission (see below for details)                            |
| July 21, 2021<br>(approximate)    | Finalists selected  |
| July 26-30, 2021<br>(approximate) | Interviews with finalists (location TBD: virtual or in-person in Rocky Mount, NC) |
| August 5, 2021<br>(anticipated)   | Selection by Golden LEAF Board and contract start date                            |

## **Proposal Evaluation**

Golden LEAF will select the proposal that it believes will deliver the highest quality deliverables at the best value. The decision will be made through a competitive process that includes factors such as:

- Qualifications of applicant
- Demonstrated understanding of the objectives of the Site Development Program
- Familiarity with issues related to economic development in rural and economically distressed areas of North Carolina
- A work plan that addresses the scope of work for the program
- Background in or demonstrated understanding of Golden LEAF's mission and work
- Creativity and analytical ability
- Cost effectiveness of proposal

## **Submission**

Complete proposals are due by NOON Eastern time on Monday, July 19, 2021.

Proposals must be submitted by e-mail in .pdf format to Ted Lord at tlord@goldenleaf.org.

Submission by mail, fax, or any method other than e-mail to the address above will not be accepted.

It is the responsibility of the applicant to ensure that Golden LEAF received the submission.

## **Inquiries**

Inquiries concerning this RFP should be submitted to Ted Lord, Senior Vice President/Staff Attorney, by noon, Friday, July 16, 2021, at tlord@goldenleaf.org.

## **Additional Information**

- 1) All costs incurred in responding to this RFP are the responsibility of the applicant and will not be reimbursed by Golden LEAF.
- 2) Golden LEAF reserves the right to not select an administrator for this project or to select an administrator for a scope of work that differs from the scope of work described in this RFP.
- 3) Golden LEAF will negotiate a written contract with the selected administrator.
- 4) Golden LEAF is subject to the North Carolina General Statutes regarding public records. North Carolina's public records laws open to public inspection most of the records, including emails and other electronic communications, in Golden LEAF's possession. Information regarding certain exceptions to required disclosure of public records applicable to Golden LEAF is [available at this link](#).