REQUEST FOR PROPOSALS
FOR
Attraction and Investment Tools (Market Analysis, Cluster Analysis, Regional Comparisons, Supply Chain Analysis, Foreign Direct Investments, M&A, and International Business Database)

ISSUED BY:
WISCONSIN ECONOMIC DEVELOPMENT CORPORATION

ON: Wednesday, June 17, 2020

All questions regarding this RFP must be submitted in writing to Benjamin Lasiewicz at Benjamin.lasiewicz@wedc.org by June 24 at 3:00 pm CT.

PROPOSALS MUST BE SUBMITTED BY:
Monday, June 29, 2020, 3:00 PM CT

To:
Benjamin Lasiewicz, Research Manager
Wisconsin Economic Development Corporation
201 West Washington Avenue, 6th Floor
Madison, WI 53703
1. Scope

The purpose of this Request for Proposals (RFP) is to provide interested proposers with the information needed to prepare and submit a Proposal for the following:

WEDC is seeking tool(s) to assist in Attraction and Investment efforts regarding: Market Analysis, Cluster Analysis, Regional Comparisons, Supply Chain Analysis, Foreign Direct Investments, M&A, and International Business Database (currently WEDC uses five tools for these services - please indicate which economic impact modeling tool you are applying):

Market/Cluster Analysis
- Needs to provide access to market studies and/or abstracts enabling obtaining a better understanding of the direction of industry and market global investments
- Provide means of assessing the impact of changes to the global economy, while also an ability to compare companies and competitors in industry sectors and markets.
- Provide an opportunity to understand the methodology used to evaluate investment opportunities in developed and emerging markets and industries.
- Objective to identify key strategic markets over the next five years that will be the primary purchasers of the goods and services produced by our driver industries
- Reporting service that will provide us with both historic industry information as well as future projections of up to five years.

Regional Comparisons
- Measure Wisconsin's competitiveness and Wisconsin Metropolitan Statistical Areas against other locations around the world (at Country, State/Province, or similar metropolitan area)

Supply Chain Analysis
- Analysis of supply chains supporting major global suppliers and tracking market development activities for those key players.

Foreign Direct Investments
- Accurately track international investment for all industry sectors and countries
- Be able to monitor investments, including greenfield investments and expansions, by capital investment, and job creation
- Be able to send alerts based on pre-investment activities to track companies

Mergers, Acquisitions and Developments
- Accurately track mergers, acquisitions, and other developments
- Alerts of mergers, acquisitions, greenfield investments and other expansions.

International Business Database
- Be source for national/international business database for Business Intelligence/Company Profiling for WEDC Field Staff interactions
• Access to company financials, transaction data, plus tools to monitor corporate and business development activities
• Access to Global Ultimate Owners with specific contacts

II. Project Timeline
The work needed to be completed under this RFP is subject to tight timing constraints. Proposers responding to this RFP must be prepared to conform to the following timeline. If this timeline is prohibitively restrictive, please indicate such and propose an alternate timeline.

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<td>Monday, July 6, 2020</td>
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<td>Monday, July 13, 2020</td>
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III. Wisconsin Economic Development Corporation
The Wisconsin Economic Development Corporation (WEDC) is a public body corporate and politic governed by Chapter 238 of the Wisconsin Statutes. WEDC was created under 2011 Wisconsin Act 7 and 2011 Wisconsin Act 32 to replace the economic and community development operations of the former Wisconsin Department of Commerce and to serve as the State of Wisconsin’s lead economic development organization. WEDC is governed by Board of Directors, WEDC’s Chief Executive Officer is appointed by the Governor.

WEDC provides financial and technical assistance and services to businesses and organizations in Wisconsin for the purpose of strengthening economic development and creating and retaining jobs. As of June 30, 2019, WEDC had approximately 124 employees and an operating budget of approximately $39,000,000. Revenues to finance its operating budget are derived primarily from state appropriation, loan repayments and other income.

WEDC operates three economic and community development divisions and eight finance and administrative departments primarily in the Madison, Wisconsin location. WEDC provides grants, loans, loan guarantees, tax credits and other financial and technical assistance to its customers. WEDC utilizes the Intacct accounting system as well as Salesforce and a grant and loan management system.

IV. Proposal Requirements
Proposers responding to this RFP must provide sufficient responses to all of the below requests for information. Failure to respond to any of the requests may result in disqualification of the proposal.
a. Mandatory Requirements

Market/Cluster Analysis Tool Requirements

i. Needs to provide access to market studies and/or abstracts enabling obtaining a better understanding of the direction of industry and market global investment (example Marketline Reports, Industry Market Reports, Marketwise, etc.)

ii. Provide means of assessing the impact of changes to the global economy, while also an ability to compare companies and competitors in industry sectors and markets.

iii. Provide an opportunity to understand the methodology used to evaluate investment opportunities in developed and emerging markets and industries.

iv. Objective to identify key strategic markets over the next five years that will be the primary purchasers of the goods and services produced by our driver industries: (for what is classified in these industries, please consult the industry profile & snapshots on corresponding urls)

2. Biohealth (https://inwisconsin.com/key-industries-in-wisconsin/biohealth/)
5. Food & Beverage (https://inwisconsin.com/key-industries-in-wisconsin/food-beverage/)

v. Reporting service that will provide us with both historic industry information as well as future projections of up to five years.

vi. Downloadable reports and abstracts

Regional Comparisons Tool Requirements

i. Measure Wisconsin's competitiveness and/ Wisconsin Metropolitan Statistical Areas against other locations around the world (at Country, State/Province, or similar metropolitan area)

ii. Include Assessment (Matrix, Competitiveness, Attractiveness, & SWOT), Rankings (Quality, Cost, & Labor), and Trends (Quality & Cost)

iii. Downloadable reports and abstracts.

Supply Chain Analysis Tool Requirements

i. Analysis of supply chains supporting major global suppliers and tracking market development activities for those key players

ii. Display 6-digit NAICS Vendors to 6-digit NAICS US Industries and 6-digit NAICS Clients

iii. Ability to look up 6-digit NAICS companies in Wisconsin, United State, Various Countries and Globally
iv. Downloadable reports and information

**Foreign Direct Investments Tool Requirements**  
  i. Accurately track international investment for all industry sectors and countries  
  ii. Be able to monitor investments, including greenfield investments and expansions, by capital investment, and job creation  
  iii. Be able to send alerts based on pre-investment activities to track companies  
  iv. Downloadable reports on Wisconsin investments in other countries and other country investments into Wisconsin  

**Mergers, Acquisitions and Developments Tool Requirements**  
  i. Accurately track mergers, acquisitions, and other developments  
  ii. Alerts of mergers, acquisitions, greenfield investments and other expansions.  
  iii. Downloadable reports and information  

**International Business Database Tool Requirements**  
  i. Be source for national/international business database for Business Intelligence/Company Profiling for WEDC Field Staff interactions  
  ii. Access to company financials, transaction data, plus tools to monitor corporate and business development activities  
  iii. Access to Global Ultimate Owners with specific contacts  
  iv. Downloadable reports and information

b. **Organizational and Staff Capabilities**  
  i. Provide a brief description of the proposer’s history and organization.  
  ii. Describe the proposer’s experiences  
  iii. Provide a list of at least three relevant engagements held by the proposer which indicates relevant experience.  
  iv. Provide a list of all staff persons who will be involved in carrying out the tasks covered by this RFP, describing each in terms of their involvement in specific tasks and qualifications.  
  v. Provide a list of any subcontractors (individual or organizational) that the proposer intends to use when providing services under this RFP (Note: the proposer is not required to use subcontractor(s). However, no subcontractor may be used without WEDC’s written approval.)

c. **Technical Requirements/Approach to the Project**  
  i. Describe, in detail, the proposer’s technical approach to the project – training to use tool  
  ii. Provide a timeline for conducting the work under this RFP.

d. **Other Items**
Please describe items not included in the scope of work under this RFP that the proposer recommends be completed. Include the price for any such extra items in the Cost Proposal as additional costs.

e. **Documents**
   i. Provide a copy of the proposer’s W-9.
   ii. Provide a copy of the proposer’s standard contract documents.

V. **Cost Proposal**
   Proposers should provide a *fixed cost proposal* for the services to be provided under this RFP, including anticipated out of pocket costs. *The cost proposal should include the estimated number or hours and the billing rate for each level of team member assigned to the engagement. The cost proposal shall be a not to exceed total cost for the services to be provided under this RFP.*

VI. **Terms and Conditions**
   The following terms and conditions affect responses to this RFP and any resulting contract. These terms shall be adhered to by any interested proposer and are non-negotiable.

   a. **Contract Term**
      The contract will cover a five-years; Sept. 1, 2020 to Sept 1, 2025.

   b. **Confidentiality**
      Proposer acknowledges that all information, data, records and documents disclosed by WEDC to proposer, or which come to proposer’s attention during the course of its response to this RFP or performance under any resulting contract constitute valuable and proprietary assets of WEDC (Confidential Information). Proposer agrees not to disclose the Confidential Information, either directly or indirectly, to any person, entity or affiliate unless required to do so by legal process of law without prior authorization by WEDC. If required to disclose Confidential Information by legal process, Proposer shall provide WEDC with prompt notice so WEDC may seek an appropriate protective order. Except as required to respond to this RFP or during the course of its performance under the terms of any resulting Agreement, proposer shall not use any Confidential Information for its own purposes.

   c. **Conflict of Interests**
      Proposers’ response to this RFP must include, in writing, disclosure of any potential conflict of interests that may arise from proposer’s performing services for WEDC. Any resulting contract will require that if a vendor fails to disclose a potential conflict of interest, and if WEDC determines such failure to disclose involves a material conflict of interest, the vendor’s contract may be declared to be void by WEDC and any amounts paid under the contract may be recovered by WEDC. Vendors shall advise WEDC of any changes in potential conflicts of interest. *This language may change with the new procurement policy.*

   d. **Nondiscrimination**
Pursuant to Wisconsin law, any contract resulting from this RFP will include the following language regarding nondiscrimination:

In connection with the performance of work under this contract, Licensor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in § 51.01(5), sexual orientation or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, Licensor further agrees to take affirmative action to ensure equal employment opportunities. Licensor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the recipient officer setting forth the provisions of the nondiscrimination clause.

e. Public Records

Responses to this RFP, any communication with WEDC, and any resulting contract and work product are subject to the public records laws of the State of Wisconsin, § 19.31 et seq. Proposers shall mark documents “confidential” where appropriate for financial and other sensitive materials that should be, to the extent possible, be kept in confidence. WEDC will notify the proposer if it receives a public records request for materials marked confidential.

f. Insurance

If awarded the contract, the proposer shall maintain Worker’s Compensation, Comprehensive General Liability, including Contractual Liability, and Automobile Liability insurance for any claims that may arise from operations under the contract.

VII. RFP Process

a. Reasonable Accommodations

WEDC will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request.

b. Communication with WEDC & Submitting Questions

All communication regarding this RFP shall be directed to WEDC’s Research Manager, Benjamin Lasiewicz, at Benjamin.lasiewicz@wedc.org. Information regarding this RFP obtained from other sources is unofficial and nonbinding. Communication with other sources may be cause for rejection of a proposal. All questions regarding this RFP must be submitted in email to WEDC’s Research Manager, Benjamin Lasiewicz by June 24, 2020 at 3:00 p.m. CT.

c. Incurring Costs

WEDC is not Liable for any cost incurred by a vendor for responding to this RFP.

d. News Releases
News releases pertaining to the RFP or to the acceptance, rejection or evaluation of proposals shall not be made without the prior written approval of WEDC.

e. **Submitting the Proposal**
Proposers shall submit an electronic, PDF, version of their Proposal, to WEDC’s Research Manager, Benjamin Lasiewicz at Benjamin.lasiewicz@wedc.org, no later than **June 29 at 3:00 p.m. CT.** Proposal responses should follow the sequence and outline presented in this RFP.

VIII. **Evaluation of RFP**

a. **Proposal Review, Verification and Acceptance**
WEDC shall review each proposal to verify that it meets all specified requirements in the RFP. Proposals that do not comply with instructions contained in the RFP may be rejected by WEDC. WEDC reserves the right to waive a particular specification if no proposer meets that specification. WEDC may request reports on the proposer's financial stability. WEDC may reject a proposal if the proposer is determined to have inadequate financial means to provide the required service. WEDC retains the right to accept or reject any or all proposals, or accept or reject any part of a proposal, determined to be in the best interest of WEDC. WEDC shall be the sole judge as to compliance with the instructions contained in this RFP. Proposals shall be firm for acceptance for sixty (60) days from date of proposal opening unless otherwise noted. A proposer may not modify its proposal after submission except to correct minor omissions or miscalculations as directed in writing by WEDC.

b. **Proposal Scoring**
Proposal scoring will be based on Section IV. Proposal Requirements’ Mandatory Requirements and vary by individual tool requirement criteria.

c. **Evaluation Criteria**
Mandatory requirements must be met in order for a proposal to be considered for award under this RFP. Evaluation of the proposals will be based on the proposer’s answering of Section IV. Proposal Requirements’ Mandatory Requirements and vary by individual tool requirement criteria.

d. **Right to Reject Proposals and Negotiate with Proposers**
WEDC reserves the right to reject any and all proposals. WEDC may enter into negotiations with multiple vendors regarding the terms of the contract and the cost proposal before determining the highest scoring proposer. WEDC shall not, under any circumstances, reveal a proposer’s cost proposal to any other proposer prior to contracting for services.

e. **Award Decision**
WEDC will make the award to the proposer deemed to provide the services described in this RFP at the best value to WEDC, taking into consideration the proposers' experience, expertise, and cost proposals.
f. **Notice of Intent to Award**
All proposers who respond to this RFP will be notified in writing of WEDC's intent to award the contract as a result of this RFP.