



Montana Cooperative Development Center
(MCDC)

REQUEST FOR PROPOSALS

MCDC Program Specialist
A Contracted 3-Year Position

Tracy McIntyre
Executive Director
Montana Cooperative Development Center
410 Central Avenue, Suite 429
Great Falls, MT 59401

THE OPPORTUNITY:

Montana Cooperative Development Center (MCDC) has received a US Department of Commerce- Economic Development Administration (EDA) award. Part of the award is to contract hire a Program Specialist that will focus on three areas of development:

- Broadband in Montana working with the telecommunication cooperatives and Montana Telecommunication Association.
- Designing and building hybrid multi-stakeholder cooperatives including labor pools and worker conversions.
- Educating, promoting, and developing investment cooperatives in Montana.

MCDC is seeking a qualified individual who will commit to a three-year contract working with MCDC staff and partners within the three areas of focus.

This opportunity is designed for an individual who has all contracting requirements within the State of Montana including an independent contractor license, workers compensation insurance or proof of exemption, and professional liability insurance. The responder should be able to be self-motivated, work from home (as long as within the State of Montana) and be able to travel. Additional travel funds are built into MCDC's three-year budget to support this position.

THE PROJECT:

The contracted Program Specialist will follow the EDA authorized scope of work. The Scope of work was designed to bring additional capacity to MCDC, an ever-growing economic development organization in Montana. MCDC's sole purpose is to address economic and community needs utilizing the cooperative business model. MCDC is the state-recognized cooperative development organization of Montana and serves all 56 counties and the 7 Native American Reservations. The goal of this contract is to work closely with the MCDC staff to bring innovative cooperative structures to the State while expanding capacity and sustainability of the organization.

A copy of the Authorized Scope of Work from EDA is included as an attachment to this RFP. Note that not all aspects of the scope of work are related to the Program Specialist contracted position but it should be reviewed and referenced within the response as the position will work with staff to achieve the deliverables.

CONTRACT DETAILS:

- Period of Performance – The length of the contract shall not exceed 3-years.
- Payment, Incentives, and Penalties – The fee for this project shall not exceed a total of \$113,000 for the three years with additional financial support for travel and supplies.
- Equipment and IT support - MCDC will NOT provide the contractor with any form of equipment or office space, though the contractor is welcome to use MCDC office in Great Falls as needed including printing and IT staff support. A MCDC email will be provided for the contractor. The contractor shall be knowledgeable on Microsoft

- programs and able to facilitate and present to groups across Montana.
- Travel and Supplies – MCDC has supporting funds for the contractor to travel at a GSA per diem and mileage reimbursement rate. The contractor should be comfortable with travel and must have a valid Montana Driver’s License and self-insured. All travel must be pre-approved by the Executive Director. Supplies may be requested and determined on a case-by-case system based on budget availability.
 - Funding for this project is provided from a grant award from the US Department of Commerce- Economic Development Administration and the Montana Cooperative Development Center. The contract must comply with requirements from the funding agency.

PROPOSAL SUBMISSION.

Please submit the following no later than October 22nd, 2021, at 12:00pm. to

Tracy McIntyre
MCDC Executive Director
410 Central Avenue, Suite 429
Great Falls, MT 594014

Email proposals are welcomed if received by due date. Subject Line must include a reference to the proposal name of “MCDC Program Specialist 3 year”. tracy@mcdc.coop

Proposals must be received at the time of due- post marked proposals will NOT be accepted.

Proposals shall include:

1. A letter of interest outlining your desire to be part of the MCDC team and why you believe your best suited for this type of contract
2. A summary of your recent and relevant project and general familiarity with similar projects.
3. A firm estimate of the fees to be charges and an estimate of expenses that would be incurred.
4. A statement of your qualifications as it relates to each part of the scope of work
 - a. Previous work experience (or resume)
 - b. Responsibilities of work
 - c. professional backgrounds
5. List of professional references relevant to this activity.
6. Proof of independent contractor’s license in the State of Montana

Questions as related to this RFP should be made in writing to the Executive Director, Tracy McIntyre at tracy@mcdc.coop.

Attachment 1

Authorized Scope of Work

Recipient: Montana Cooperative Development Center

Award Number: 05-79-06093

Project summary:

This grant award will help communities catalyze public-private partnerships to foster collaboration, attract investment, create jobs, and foster economic resiliency and prosperity in three main areas:

- Broadband Adoption
- Opportunity Development Cooperatives / Investing Cooperatives
- Labor Hybrid Cooperatives

MCDC will bring on additional capacity through a contracted Program Specialist; create materials and outreach to share and utilize; provide training for staff and CDS network; and engage legal advisors to better the organization's technical services. It will also “free” up some time for the current staff to dive deeper into the formation of cooperatives with innovative structures and truly address the communities' needs.

MCDC will work on the following tasks during the three-year project:

Year 1:

Broadband:

Overview: The project's Broadband Adoption component will partner with the Montana Telecommunications Cooperatives to develop strategies to increase broadband adoption and bridge the gap between cooperative providers and economic developers.

Tasks (will involve work by the CDS network) :

- Survey the eight Montana telecommunications cooperatives to gather information on speeds available, packages and costs, service area and share with the economic developers working with the business community. This includes understanding and sharing the cooperatives' plans to have fiber to their service areas in 5 years.
- Work with State officials and broadband committees to use the information to assist in broadband mapping.
- Work with local development organizations to understand what frustrations and obstacles there are within the telecommunications cooperatives' communities on connectivity issues and relay that back to the cooperatives.

Deliverables:

- Provide results of the survey of the eight telecommunication cooperatives.
- Provide information on efforts to assist the State in Broadband Mapping – including dates on who and when MCDC meets with committee and State agencies.
 - NOTE: This deliverable is may change as the State Legislators, Administrators, and providers are in discussions on how to spend broadband dollars, and mapping is still undecided.

Opportunity Zones:

Overview: Year 1 of this project is the study phase, with \$30,000 of the funds allocated to how Opportunity Zones can work in conjunction with Opportunity Development Cooperatives-Investing Cooperatives. The study will then move into pilot programs coordinated by the contracted Program Specialist with assistance from local Cooperative Development Specialists (CDS) and the Program Director.

The pilot programs, assuming that the feasibility study shows the opportunity zones and investing cooperatives can work together, will result in the experience and materials on building investing cooperatives within opportunity zones. The intended outcomes for the pilot programs will be to gain understanding in how to form a cooperative that can accept or enhance opportunity zone investments, build techniques for the development of the investing cooperative working with the steering committee (and legal), and create the templates needed to do the process in other communities. The specific tasks will be determined based on the outcome of the study. Note: The pilot programs may run into Year 2.

Tasks:

- Procure a third-party consultant to conduct a study on how investing cooperatives can be used within an opportunity zone.
- Use the study results to coordinate the pilot of at least two start-up opportunity zones investing cooperatives. Depending on the study results, this will be done with the intent to attract and/or invest in the opportunity zones or to move forward with two new investing cooperatives in the State.
- The Program Specialist (ideally with the third-party consultant) will develop and coordinate at least one overview training of the CDS team (12 CDS members and 2 MCDC staff) on the outcome of the study and how investing cooperatives can be utilized further in the State of Montana.
- The study will be shared on the Montana Cooperative Development Center and Montana Council of Cooperatives Websites

Deliverables:

- Procurement information for the study consultant
- Contract for study consultant
- Study consultant progress report with final by the end of Year 1
- Identify two pilot projects (communities) and report on activities (group meeting notes/agendas, community engagement flyers, numbers, etc.)
- Training/Presentation materials and reporting on attendance

Labor Hybrid Cooperative Models:

Work Overview: The Labor Hybrid Cooperative is a newer concept for cooperatives emerging as a result of COVID-19. The Program Director will focus attention on the development of cooperatives in response to the EDA work with legal review and assistance. This will involve time of and research by internal staff and the contracted Program Specialist through engagement with the National Cooperative Business Association and the Cooperation Works Association network. By the end of Year 1 and into Year 2 of this project, MCDC will put money towards developing materials and creating templates for by-laws, articles, and incorporation processes of these hybrid cooperative models.

Tasks:

- Coordinate with legal to review the Montana State laws to determine how MCDC can utilize the hybrid model to address the needs of Montana's recovery further through cooperative focusing attention on workforce/labor cooperatives and worker conversions.
- The Program Director and the Program specialist will begin creating templates to formulate a toolkit for the CDSs and MCDC staff to use for efficiency in developing these hybrid models.
- Coordinate with the national association to gather other state practices and materials.

Deliverables:

- Supply samples of hybrid-cooperative models from other states (if any)
- Provide the research synopsis and legal opinion.

Year 2:

In Year 2, the contracted Program Specialist and MCDC staff will focus on taking the lessons learned in Year 1. The main tasks will build upon the initial success and information gathered to develop materials further, interact with potential start-up cooperatives, and train CDSs and staff.

Broadband:

Overview: MCDC will build infographics and materials to share how the telecommunication cooperatives provide quality broadband services across the State. This information will be readily available on the MCDC website and will also be made available to the Montana Telecommunication Association and feed into efforts done by the State. Broadband is an ever-changing topic in Montana, so the tasks outlined here are based on current understanding of the need as of this award. MCDC is actively engaged in the State discussions where, while this document is being drafted, there is a bill to invest over \$350 Million in broadband deployment. MCDC will be working with the cooperatives to understand this impact and making sure any newly deployed services are included in the efforts outline here.

Tasks:

- MCDC staff and the Program Specialist will develop the materials and distribute them not only to the CDS network but across the Montana Economic Developers Association (MEDA) members (220 members) on what the telecommunications provide.
- Continue working with the partners across the State on broadband adoption, building materials, and assisting with outreach to communities through the CDS network to the cooperatives' service areas on what broadband capacity is available.
- Identify a method to track adoption from work completed through this funding award- possibly a second survey with the telecommunication cooperatives or survey communities in general.
- Survey the CDSs on efforts and effects of the adoption materials in the telecommunication cooperative service areas.
- Work with the telecommunication cooperatives to identify solutions for the obstacles of adoption identified in year one.

- If timing allows and it is within the scope of MCDC, work with the telecommunications and other partners across Montana to bring in solutions.
 - Note- it is hard to determine specific tasks until it is known and the research is completed. This task and deliverable may change based on year one's activities.
- Deliverables:
 - Copies of the materials developed and report on where and how the distribution occurred.
 - Report on the impact of adoption outreach (will go into year 3)
 - Survey results from the CDSs on adoption efforts.
 - Report on solutions determined for the obstacles identified.

Opportunity Zones:

- Work Overview:

If the study showed the ability to move forward with opportunity zones and investing cooperatives, the pilot programs would move into incorporation with the intent to start accepting investment through the opportunity zone by the end of year two into year three. MCDC will create a toolkit that outlines how investing cooperatives are formed and conduct training and outreach.

If the study shows that the opportunity zones and investing cooperatives cannot work well together, MCDC will pivot and expand work on education and development of investing cooperatives as a stand-alone solution for local needs across the State.

- Tasks:
 - The Program Specialist and CDSs will continue to support the pilot programs, with the MCDC Program Director working on moving the two communities into incorporating investing cooperatives.
 - The Program Specialist will work on the development of a toolkit of the Opportunity Zones and Investing Cooperatives. This will include templates for by-laws, steps and strategies for communities to form an investing cooperative, expanded FAQ page, etc. It will be electronic and placed on the MCDC website.
 - Again, if the opportunity zone and investing cooperative programs are found to be incompatible, the toolkit will focus solely on the investing cooperative program.
 - Program Specialist and MCDC Program Director will develop a more in-depth training program for the CDSs to walk through the toolkit.
 - MCDC will offer to present findings from the study and pilot programs along with an overview of the toolkit to the Montana Economic Developers Association, the Montana Association of Counties, and others.

- Deliverables:
 - Training materials and reports on when, where, and who outreach was done to.
 - Updates on the Pilot Programs and, if incorporated, incorporation documentation.
 - Toolkit documents

Hybrid Models:

- Work Overview:
Building upon the research of year 1, finalize the toolkit and begin outreach to communities on the possibility of utilizing the cooperative business model to address community needs for economic development, including workforce development.
- Tasks:
 - Finalize the toolkit and publish it on the MCDC website.
 - Train the CDS network with at least one training during year two on research completed and how to use the final toolkit. This will include the multiple ways hybrid cooperatives could be utilized, including labor/workforce development.
 - Coordinate training/informational meetings with the Montana Secretary of State and Security Commissioner staff with legal if needed to ensure their offices are up to date on the effort and can work with MCDC to incorporate these types of cooperatives.
- Deliverables:
 - Training materials for the CDS network and report on who attended.
 - Present information as developed for the toolkits (by-laws, incorporation paper, etc.)
 - Report on meetings/training with Secretary of State and Security Commissioners. Any documents shared in these meetings will be submitted to EDA.

Year 3-

In year three, an assumption is being made that the EDA award has resulted in on the ground development of cooperatives. The Program Specialist spending more time promoting the results of information gathered and material developed from years one and two. Year three is focused on implementation with time from the Program Director allocated to developing new cooperatives (investing and hybrid) and a more significant contract for the Program Specialist. As year three is dependent on how year one and two progress, all the following tasks and deliverables may need to be altered with EDA approval.

NOTE: MCDC already has seen an interest in these hybrid or multi-membership cooperatives and investing cooperatives. An investing cooperative steering committee has already formed in Butte, and the question of how to layer with an opportunity zone has already been asked. Numerous communities are looking into these two types of

cooperatives. With the additional capacity of the Program Specialist, MCDC could, in reality, have cooperatives formed with multi-layer ownership and addressing labor concerns/issues, and have investing cooperatives formed and in operations by year three.

Broadband:

- Work Overview:

Year three will see the continuation of the Program Specialist working on the ground with the telecommunication cooperatives and CDSs on outreach on the cooperatives' broadband services. Year three work plan will finalize any additional materials/outreach to promote longevity of the program and continue to feed into the State's broadband office (if developed).

- Tasks:

- Meetings/Presentations to community members within the telecommunication cooperative regions would target business opportunities and promote private investment and job creation.
- Expand on the MCDC website as a source for the information gathered over the last three years.
- Continue open communication and information sharing of adoption availability within the telecommunication cooperative areas with the economic developers and other associations such as the Montana Chamber of Commerce and Associations of Counties.
- Continue working with State efforts to share availability and investment within the service areas of the cooperatives.

- Deliverables:

- Report on who, when, and where outreach occurred – communities, organizations, etc.
- Share any additional presentation and materials that are developed (if any)
- Share website materials and updates on any previous materials developed.

Opportunity Zones:

- Work Overview:

If all goes as planned, and the study, as well as the pilot programs, have proven that opportunity zones and investing cooperatives can be utilized together, MCDC with the CDSs will work with the pilot program. Hopefully, by year three, at least two investing cooperatives are incorporated. The work under EDA will then focus on developing the materials to attract the investment into the opportunity zones via the investing cooperatives. If this occurs, work will progress to promoting and laying out a pipeline of interested communities for future cooperative development work. It is expected by this time, legal engagement on contracts and such for investing will be needed.

Year three is entirely dependent on what years one and two result in.

As mentioned in the year two overview, if it is determined the two tools cannot work together, MCDC will promote and develop materials of investing cooperatives as stand-alone entities with the potential for locals to invest in their communities.

- Tasks:
 - Develop materials and contract templates for investment in opportunity zones utilizing investing cooperatives.
 - Develop training/presentation materials to share with the economic and community leaders in Montana to promote the utilization of investing cooperatives.
 - Conduct outreach at all venues available, including but not limited to the Montana Chamber Business Days, Montana Association of Counties and Montana League of Cities and Towns., etc.
 - Create a plan for the long-term sustainability of the opportunity investing cooperative programs for MCDC.

- Deliverables:
 - Provide any additional materials and template documents to EDA as formulated.
 - Report on who, when, and where any outreach occurs.
 - Report on any start-up of other investing cooperatives resulting from the work of this program.
 - Report on how the pilot programs are faring in year three with how much investment is raised to date.
 - Send in the plan for sustainability of the program after the Program specialist is no longer contracted.

Hybrid Models:

- Work Overview:

This component of the project will move from research and development of materials for the toolkit into the development of cooperatives. If all goes well, the result will be the Program Specialist with the Program Director to build a pipeline for start-up cooperatives or communities interested in the hybrid model to address community and economic needs.

- Budget: all budget for this section is in the overall budget

- Tasks:

- Target at least three communities for a hybrid-model cooperative based on the interactions of presentations and outreach completed in previous years, utilizing the toolkit to walkthrough start-up.
- Develop a plan for the long-term sustainability of this program for MCDC to continue forward without the Program Specialist.
- Deliverables:
 - Report on the success of start-up cooperatives being formed- this will include progress, the industry of focus, communities they are located in, reporting on the incorporation with number of members and investor stakeholders if available.
 - Share the plan for the long-term sustainability of the hybrid model program under MCDC.