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Header 1

General Information

Contact

Default Values

Discount

Document Information

Procurement Folder: 557854

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Legal Name: FOURTH ECONOMY CONSULTING INC

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Status: Closed

Response Time: 9:52

Solicitation Description: WV Farm to School Plan Facilitator

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Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Solicitation Response**

Proc Folder : 557854
Solicitation Description : WV Farm to School Plan Facilitator
Proc Type : Central Purchase Order

| Date issued | Solicitation Closes | Solicitation Response | Version |
|-------------|------------------------|------------------------------|---------|
| | 2019-03-28 13:30:00 | SR 1400 ESR03281900000004477 | 1 |

| VENDOR |
|---|
| VS0000016289 FOURTH ECONOMY CONSULTING INC |

Solicitation Number: CRFQ 1400 AGR1900000015

Total Bid : \$28,875.00 **Response Date:** 2019-03-28 **Response Time:** 09:52:38

Comments:

FOR INFORMATION CONTACT THE BUYER
 Melissa Pettrey
 (304) 558-0094
 melissa.k.pettrey@wv.gov

| | | |
|--------------------------|---------------|-------------|
| Signature on File | FEIN # | DATE |
|--------------------------|---------------|-------------|

All offers subject to all terms and conditions contained in this solicitation

| Line | Comm Ln Desc | Qty | Unit Issue | Unit Price | Ln Total Or Contract Amount |
|------|---|-----|------------|------------|-----------------------------|
| 1 | Phase One (1) Establishing a Baseline Understanding | | | | \$6,600.00 |

| Comm Code | Manufacturer | Specification | Model # |
|-----------|--------------|---------------|---------|
| 80101504 | | | |

Extended Description : Phase One (1) Establishing a Baseline Understanding

Comments: Includes existing plan review, steering committee interviews, and steering committee meeting

| Line | Comm Ln Desc | Qty | Unit Issue | Unit Price | Ln Total Or Contract Amount |
|------|---------------------------------------|-----|------------|------------|-----------------------------|
| 2 | Phase Two (1) Strategy Identification | | | | \$9,570.00 |

| Comm Code | Manufacturer | Specification | Model # |
|-----------|--------------|---------------|---------|
| 80101504 | | | |

Extended Description : Phase Two (1) Strategy Identification

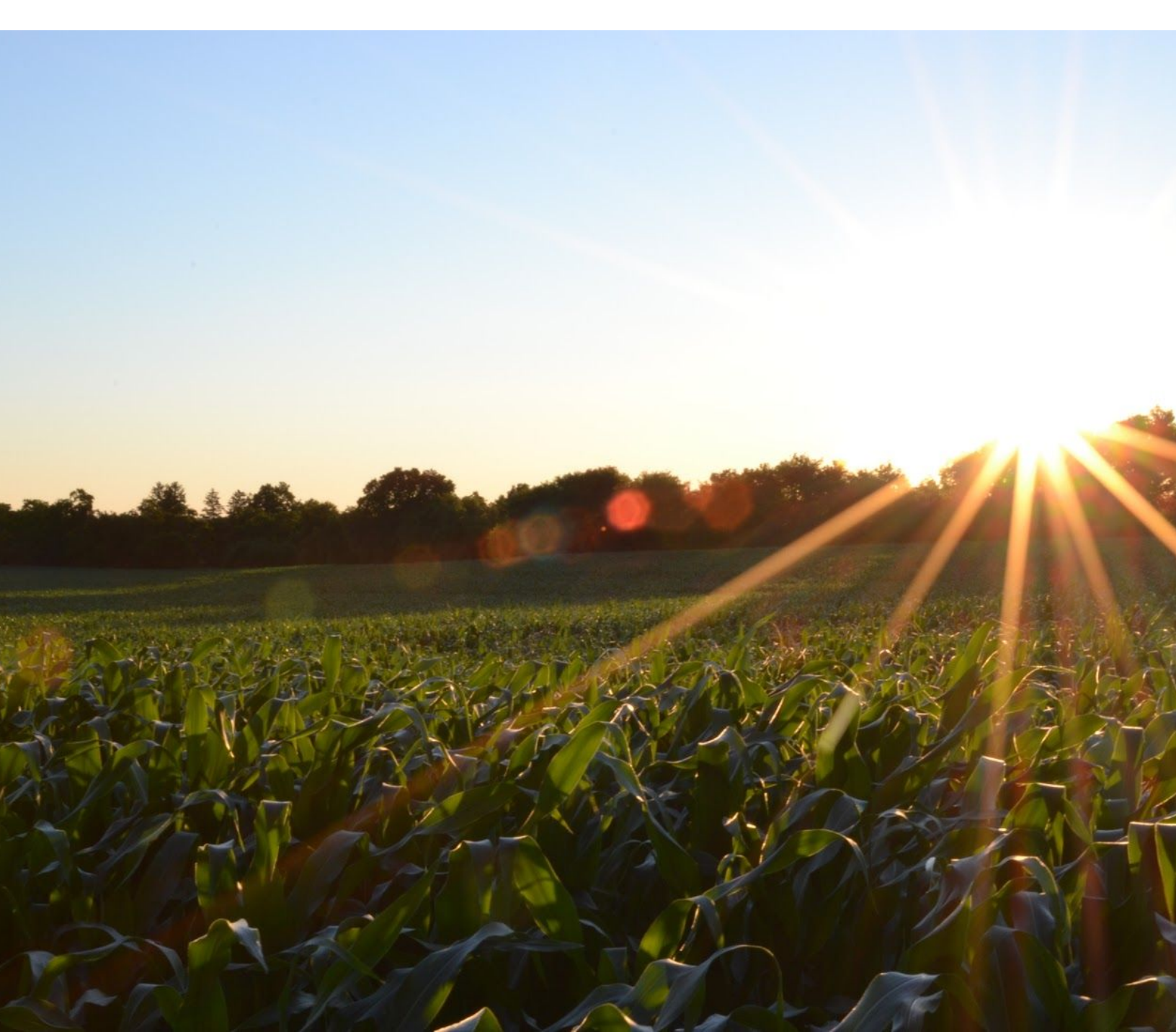
Comments: Includes best practice research and interviews, ideation session, and steering committee meeting

| Line | Comm Ln Desc | Qty | Unit Issue | Unit Price | Ln Total Or Contract Amount |
|------|--|-----|------------|------------|-----------------------------|
| 3 | Phase Three (3) Strategic Plan Development | | | | \$12,705.00 |

| Comm Code | Manufacturer | Specification | Model # |
|-----------|--------------|---------------|---------|
| 80101504 | | | |

Extended Description : Phase Three (3) Strategic Plan Development

Comments: Includes strategy development, steering committee meeting, and final plan development



WV Farm to School Plan Facilitator

March 27, 2019

Submitted by Fourth Economy

Melissa K. Pettrey, Senior Buyer
WV Department of Administration
State Capitol Complex
2019 Washington Street, East
Charleston, WV 25305

March 26, 2019

Dear Ms. Pettrey,

Thank you for the opportunity to submit this proposal to support in the development of a strategic plan for the West Virginia Farm to School program. Fourth Economy brings both experience working with West Virginia's agricultural stakeholders and extensive strategic planning experience.

In 2018, Fourth Economy was fortunate enough to support the West Virginia Agricultural Advisory Board in developing a strategic plan to help grow the agriculture economy. As part of that process we engaged with 350 stakeholders in West Virginia and got to learn in-depth about the challenges and opportunities facing the sector. The Farm to School program is a critical piece of several of the region's strategic goals - including opening new markets for farmers and increasing consumer demand for local products through introducing them in schools. A plan to grow the state's entire agriculture economy could only go into so much depth for each strategy; therefore, we would be grateful for the opportunity to further develop the Farm to School strategy given its critical role in supporting the overall plan.

Fourth Economy has developed a unique approach given extensive experience in developing strategic plans. Nearly every strategic plan requires addressing three key questions. First: What should we do? Often times, the options of what an organization can do are endless! Therefore, to decide what they should do, we help our clients develop realistic priorities. Second: Who should do it? Especially for a program as large and impactful as Farm to School, answering this question requires honest discussions about who leads and who supports based on experience and capacity. Third: How should they do it? Without a roadmap for where to start, a strategic plan can easily sit on the shelf; therefore, we help our clients think through the details of how to execute on their plan.

The approach that follows reflects our thoughts based on our experience and the RFP; however, we are always happy to amend our approach based on initial conversations. We would welcome the opportunity to discuss how we can best support the development of a strategic plan for the West Virginia Farm to School program.

Sincerely,



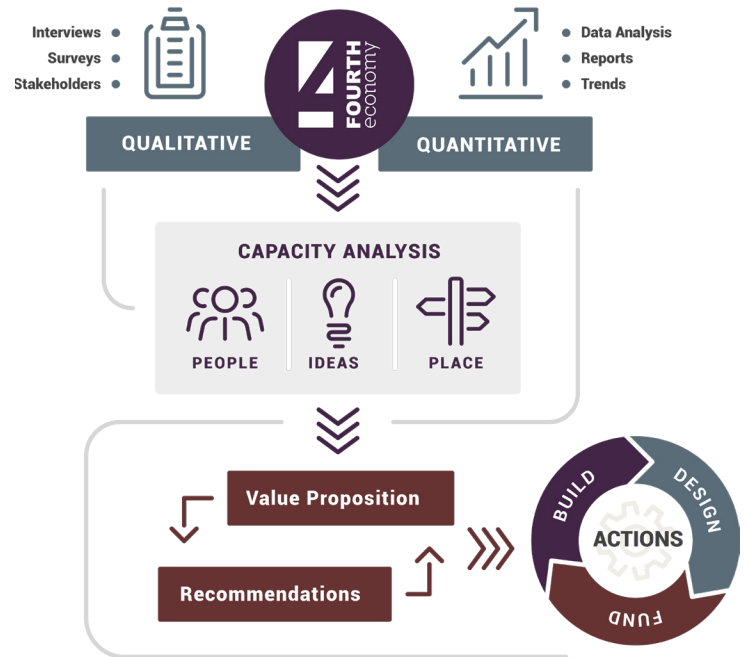
Rich Overmoyer, President & CEO

About Our Firm

Fourth Economy is a mission-driven consulting group that seeks to equip change agents with the tools they need to build better communities and stronger economies.

Our experience in working on hundreds of projects informs our approach and guides us on where to begin with each client engagement. We recognize that each engagement requires a tailored and often iterative process. We strive to become partners with our clients and understand their needs and aspirations.

We blend both quantitative and qualitative inputs at every point in the consulting process, developing realistic recommendations that can be easily understood and readily implemented.



Our Values



Curiosity



Collaboration



Creativity



Empathy



Fun

What Sets Us Apart?

Fourth Economy has assembled a team of experts who have worked in economic development agencies, industry, non-profit organizations, and tier-one research institutions.

We work at the intersection of diverse systems, from community development to economic development, from transportation to real estate development, and from legacy industry to entrepreneurial ecosystems. We use our experience in economic development to frame environmental, social, and cultural issues in a context that resonates with investors and public policy leaders. This is demonstrated both through our work with 100 Resilient Cities and our award winning approach to helping communities leverage their quality of place assets to change their economic and demographic paths.

Our team serves as connectors in the fourth economy, bringing together the creative energy of individuals to make new ideas and plans happen, creating lasting results for our clients.





Project Profile



A Shared Agenda for Growing West Virginia's Agricultural Economy West Virginia University

The Agricultural Advisory Board represents the West Virginia Governor, Commissioner of Agriculture, and Dean of WVU Extension Service. The Board appointed a Steering Committee with whom Fourth Economy worked closely. The Committee included representatives from the WV Department of Agriculture, WV Farm Bureau, USDA WV Natural Resources Conservation Service, WV Conservation Agency, WVU Extension Service, WVU Davis College, and WV State University Extension Service.

THE CHALLENGE

West Virginia has a strong agriculture history, and saw the opportunity to further develop its agriculture economy to support overarching efforts to grow and diversify the WV economy. Like rural economies across the country, issues such as declining farmland, aging farmers, and a lack of physical and digital connectivity have been hampering the WV agriculture economy. However, bright spots such as new crops, increasing agritourism, and upstart cooperatives also illuminate a path forward. Fourth Economy was charged with identifying the most pressing challenges and opportunities, and developing a shared plan for the agencies and institutions that support the agriculture industry to address them and grow the agriculture economy.

OUR APPROACH

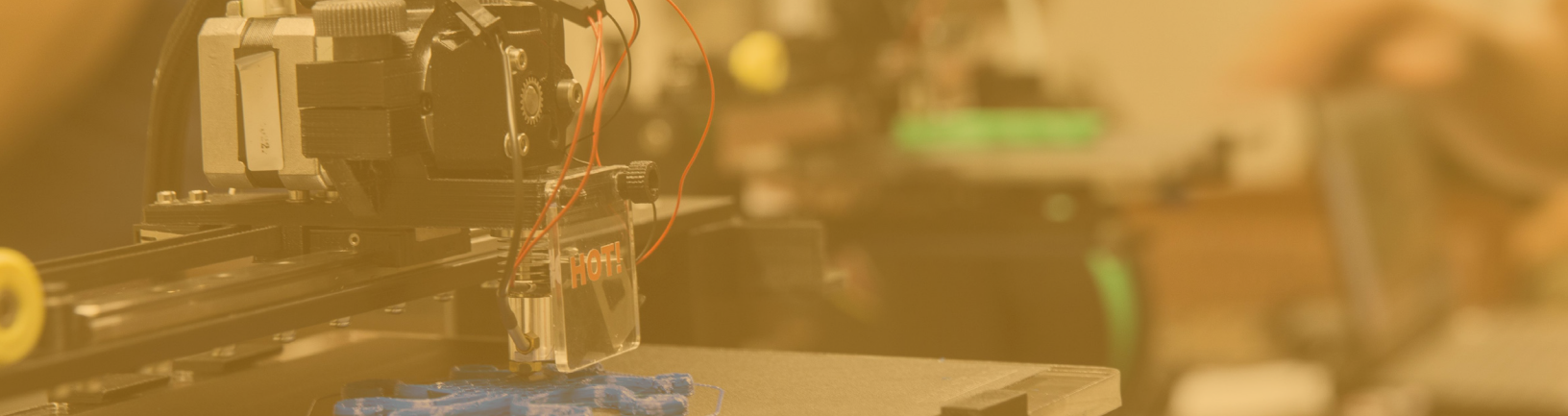
The Fourth Economy combined quantitative and qualitative data to identify the most pressing challenges and opportunities facing the WV agriculture economy. This included a survey of over 500 stakeholders, as well as a deep dive into a variety of data sources to profile who is growing what and where in WV. Based on this analysis, we identified several areas of focus, around which we engaged over 350 stakeholders to develop strategies. To do so, we trained agency staff how to facilitate 'Build Sessions' and supported them in hosting 14 community meetings across the state. After working with the Steering Committee to prioritize the strategies that were most likely to grow and diversify the agriculture economy, Fourth Economy worked closely with key stakeholders to further develop detailed strategies.

RESULTS

The final plan prioritizes 10 goals, each with detailed action steps. The Steering Committee is remaining in tact to oversee and support the implementation of those goals. In approving the final plan, the Commissioner of Agriculture noted that the planning process has resulted in a new level of collaboration and coordination among agriculture stakeholders.

Link to Report: www.wvagadvisory.org/wp-content/uploads/2019/03/WVAg-Full-Report.pdf

Reference: Norm Bailey, Chief of Staff
West Virginia Department of Agriculture
nbailey@wvda.us
304-558-3200



Project Profile

Conexus Strategic Plan Conexus Indiana

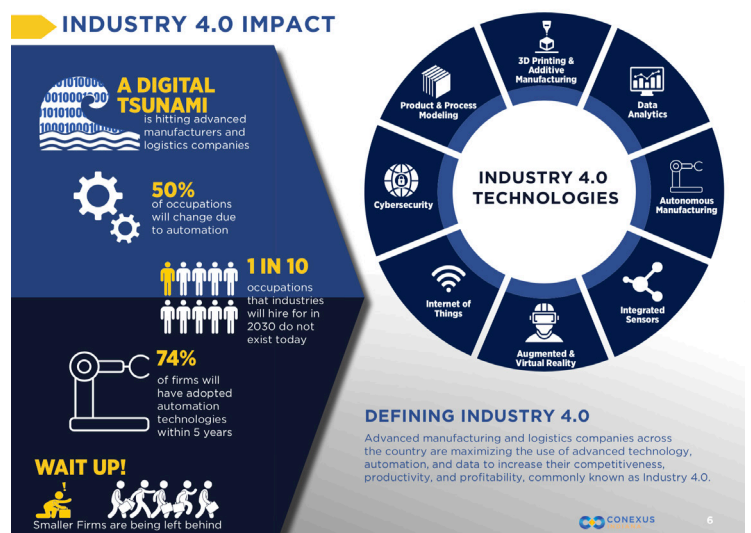
Conexus Indiana is a private, non-profit organization dedicated to advancing the advanced manufacturing and logistics organization in Indiana. Heading into its eleventh year, Conexus had hired a new CEO (former COO of Angie's List) with a bold new vision for the organization. The organization's role relative to workforce development was uncertain - though they had created several important programs, other organizations were more clearly positioned to lead that work. Meanwhile, new issues related to industry 4.0 were arising with no organization stepping up to help companies prepare. Furthermore, Conexus's Industry Councils were feeling aimless and ineffective.

Fourth Economy facilitated a five-month strategic planning process during which we:

- Conducted a deep dive into the data to understand the future of the advanced manufacturing and logistics industry
- Facilitated human-centered design sessions with key stakeholders throughout the state, as well as the Industry Councils, to develop ideas on how Conexus could best support the industry
- Worked closely with a Steering Committee, the CEO, and staff to develop, vet, and refine recommendations for the future of the organization

The final plan articulated clear goals and initiatives around four strategic pillars. The plan has already helped Conexus secure support from the Lilly Endowment for implementation. The plan will be available for public view by the end of the calendar year.

Reference: Mark Howell, CEO
Conexus Indiana
mhowell@conexusindiana.com
317.638.2104





Project Profile



Indianapolis Metropolitan Planning Organization (Indy MPO) Strategic Plan to Support Regional Competitiveness

Indy MPO, Indianapolis, IN

Fourth Economy Consulting was retained by the Indy MPO in summer 2017 to embark on a strategic planning process designed to explore two key questions: first, what types of planning and programs does the Indianapolis region need to enhance/ maintain economic competitiveness and second, what should the role be for the Indy MPO to play a key role in the future of the region. Fourth Economy led a planning process that included 5 key elements:

Regional economic development infrastructure analysis - understanding the strengths and the gaps in the existing capacity and facilitating partner conversations to identify approaches to strengthen the system

Benchmarking and leadership team site visits - identified 'best in class' MPO peer organizations in regions that are demonstrating exceptional economic growth and managed a peer-to-peer learning exchange.

Regional scenario planning - through interviews and analysis identified topic areas that may create barriers to economic growth. These included workforce housing, land use, water quality and access, transportation and economic development. Ran a two session scenario planning process that included teams of regional leaders identifying how they would deal with issues and opportunities. The outcome was to identify a series of missing regional leadership tools and roles in these critical areas.

Organizational analysis - as a result of the scenario planning and organizational benchmarking we developed a set of recommendations for what role the Indy MPO should play in the future. This also included a recommendation that the organization 'spin out' of their existing host organization to allow for increased flexibility and autonomy.

Roll out strategy development - As a final step in the strategic planning process Fourth Economy facilitated conversations with the Indy MPO Board and committees and developed materials for the Indy MPO team to share with others involved in the decision-making process.

The engagement process and resulting work product allowed the Indy MPO to build a group of stakeholder advocates that recognized the regional needs and support the organization as a logical lead. The strategic plan recommendations including the recommended new organizational structure received final approval in August 2018.

Final Report: <http://bit.ly/FECindympo>

Reference: Sean Northup - Deputy Director, Indianapolis Metropolitan Planning Organization
200 East Washington Street Suite 2322, Indianapolis, IN 46204
765.425.4909, sean.northup@indympo.org

NICOLE MUISE-KIELKUCKI DIRECTOR OF ECONOMIC INNOVATION



Nicole is a pragmatic leader who uses her skills and experience managing projects and teams to effectively inspire collaborative action. She brings a systems-approach to analyze situations, develop strategies and design new processes. Nicole is passionate about helping communities access their unique financial, natural, and human capital assets to create robust local economies, and resilient, sustainable communities that increase quality of life for all.

EDUCATION

Chatham University

Pittsburgh, PA
Masters of Arts in Food Studies

University of Pittsburgh

Pittsburgh, PA
Bachelor of Arts, Political Science & Philosophy

PRIOR EXPERIENCE

Idea Foundry

Impact Innovations Director

Lawrenceville Farmers' Market

Community Outreach

Winchester Thurston School

Sustainability Programs

AREAS OF EXPERTISE

- Food Systems
- Innovation Ecosystems
- Entrepreneurship & Small Business
- Social Enterprise & Impact Investing
- Program Development & Design
- Project Management

PROJECT EXAMPLES

IMPACT INNOVATIONS

IDEA FOUNDRY, PITTSBURGH, PA



Led the organization's impact innovations initiatives including accelerator and investment programs. Managed multiple teams to provide business development services to participating entrepreneurs. Built and maintained relationships with partner organizations and funders. Developed program-related communications including sector reports, press releases, and grant requests.

FROM RISK TO RESILIENCE

USDA, PITTSBURGH, PA



Co-designed and delivered a USDA-funded pilot to connect Pittsburgh-region farmers and food producers to buyers interested in sourcing locally. Assisted with grant proposal, scope definition, program development and implementation. Coordinated five programmatic partner organizations and multiple service providers to support participating farms and food businesses.

MEASURE WHAT MATTERS

B-LAB, PITTSBURGH, PA



Convened local stakeholders in the sustainable business community to gauge support for a regional Impact Measurement campaign. Trained with B Lab on their impact measurement tool, B Analytics. Designed and ran pilot with 10 local impact-driven startup companies to test the viability of impact measurement and improvement strategies.

EMILIE YONAN RESILIENCE STRATEGIST



Emilie is an organized, passionate strategist who thrives on delving into problems and discovering opportunities for our clients. She loves finding all the possible solutions and outcomes and finding the best path forward. Whether it's job creation through mine remediation or reuse of real estate, Emilie is always eager to learn the nuances and details of projects. She firmly believes in creating equitable local and regional economies that reflect stakeholder and local interests.

PROJECT EXAMPLES

EDUCATION

University of Michigan
Taubman College of Architecture +
Urban Planning
Ann Arbor, MI
Master of Urban and Regional Planning

Hofstra University
Hempstead, NY
B.A. Economics

PRIOR EXPERIENCE

Nighttime Economy
City of Pittsburgh
Pittsburgh, PA

Olympic Infrastructure
Ann Arbor, MI

City of Harper Woods
Harper Woods, MI

AREAS OF EXPERTISE

- Economic Development
- Policy Analysis
- Community Engagement
- Secondary Research

A SHARED AGENDA FOR GROWING THE AGRICULTURAL ECONOMY IN WEST VIRGINIA

WEST VIRGINIA DEPARTMENT OF AGRICULTURE, WEST VIRGINIA



Fourth Economy was hired to develop a strategy to grow the agricultural economy of West Virginia. Emilie conducted interviews with stakeholders as well as supported the coordination of 14 community meetings throughout the state. Along with stakeholder engagement, Emilie analyzed emerging markets and opportunities for agricultural investment.

FAIR SHAKE STRATEGIC PLAN

PITTSBURGH, PA



Fair Shake is a Pittsburgh-based, non-profit environmental law firm. They hired Fourth Economy to help them expand into new markets and create a sustainable business model. Emilie produced a market analysis that described the opportunities for Fair Shake to expand into different lines of business and geographies, as well as identifying threats and opportunities for the organization.



New Hampshire Department of
**BUSINESS AND
ECONOMIC AFFAIRS**

NEW HAMPSHIRE ECONOMIC PLAN

STATE OF NEW HAMPSHIRE

Fourth Economy is working with the state of New Hampshire on their 10 year economic plan. Emilie has assisted in analyzing population and economic trends as well as facilitating on-the-ground stakeholder meetings throughout the state.

Situational Summary

The Farm to School program in West Virginia integrates local products into school meals, incorporates agricultural education into the classroom, and supports the expansion of school gardens. From 2013 to 2014, schools purchased \$650,000 worth of food from local sources, nearly double the amount from 2012 to 2013.

In 2017, the West Virginia Farm to School program received a grant from the USDA to create a strategic plan. The current task force for West Virginia's Farm to School program is made up of the West Virginia Department of Education, the West Virginia Department of Agriculture, the West Virginia University Extension Small Farm Center, New Appalachian Farm and Research Center, and the Collaborative for the 21st Century Appalachia. These organizations are looking to better define their common goals and how they work together to achieve them.

Fourth Economy supported the development of another strategic plan focused on statewide, overall agricultural growth in West Virginia from 2018 to 2019. This plan identified barriers and opportunities for growing the agricultural economy with strategies focused on connecting farmers to larger, institutional markets as well as supporting healthy, local eating campaigns. The Farm to School strategic plan should align with the strategies from the statewide agricultural plan.

Approach

Phase 1: Establishing a Baseline Understanding

For the first phase of the planning process, it will be important to understand past efforts, as well as current barriers and opportunities facing the Farm to School program. The strategic plan should incorporate and acknowledge other strategies identified in past plans and build on existing work. To establish a baseline understanding, we will:

- Review all existing data and related plans and documents, including a preliminary SWOT Analysis (provided by the WVDA) to inform the plan. By monitoring trends and policies relating to agriculture, we can better plan for the future of this program. We have experience considering the future of the agriculture industry and making recommendations to better embrace technological change and consumer behavior.
- Interview each of the members of the Steering Committee to understand opportunities and barriers that should be addressed in the plan. Our goal will be to find common themes that connect the barriers and opportunities that each member identifies. For instance, questions like "how do you envision the highest functioning and most impactful Farm to School program" or "what would allow for expansion of this program" encourages participants to dream big, but also articulate specific issues or opportunities that might not come up in our secondary research.

- Facilitate a Steering Committee meeting to agree upon barriers and opportunities found in the baseline understanding process that need to be addressed in the plan. We will present our findings and have Steering Committee members score the barriers and opportunities they believe are most important and impactful.

Phase 2: Strategy Identification

To create an implementable strategic plan, it is important to balance secondary research and direct input from the Farm to School stakeholders. Both will provide inspiration and innovative approaches to addressing the barriers and opportunities identified in the baseline understanding phase. Through stakeholder engagement and research into best practices, Fourth Economy will identify strategies to be reviewed and agreed upon by the Steering Committee.

We will research best practices that are related to the opportunities and barriers discussed in Phase 1. These best practices can be examples from other states, as well as from within West Virginia, with the goal of replicating model programs statewide. For instance, the National Farm to School Network has created toolkits, identified best practices in states like Mississippi and Vermont, and developed other helpful resources for aspiring programs. We will review resources like this to accumulate a variety of insights from these best practices. Once this research is performed, Fourth Economy will solicit feedback from the Steering Committee on the top three best practices and interview representatives from the selected programs. To recommend the most appropriate and implementable structure we can, we'll ask people from these programs about their structure, funding, challenges they have faced, and other helpful insights.

Along with the best practices research, Fourth Economy will also facilitate an ideation session with the Farm to School stakeholders to develop solutions to the identified barriers and opportunities. These stakeholders would be members of the Steering Committee, other representatives from the Steering Committee organizations, and other groups identified through the baseline understanding and interview process. We believe it is important for stakeholders to play an active role in articulating what organizations should be involved and what steps should be taken in these strategies to overcome barriers and take advantage of opportunities. Feedback from this session will then be incorporated with the information from the best practice research to culminate in a portfolio of strategies.

Fourth Economy will then facilitate a Steering Committee meeting to review the findings from the best practices research, ideation session, and proposed strategies. The Steering Committee will then agree on a portfolio of strategies (up to 10) that should be aligned with the Strategic Plan for the agricultural economy. The Strategic Plan for West Virginia's Agricultural Economy includes at least two strategies focused on increasing the connection between students and agriculture, as well as introducing schools as wholesale opportunities. It will be important to make sure recommendations for the Farm to School program are integrated and in line with the overall Strategic Plan.

Phase 3: Strategic Plan Development

After agreeing upon the portfolio of strategies for the plan, Fourth Economy will work with representatives from the Steering Committee to further develop these strategies and make them implementable. Steps, timelines, roles, resources, and other details will be articulated with the help of these representatives.

Once these detailed strategies are drafted, Fourth Economy will facilitate a Steering Committee meeting to review and agree on this draft. This will be an opportunity to provide final feedback and approve the strategic plan. Following this meeting, the consultant will revise and finalize the plan.

The final deliverable will include an executive summary for easy public consumption and quick insight into the strategies. The full report will be formatted as a “roadmap” so task forces or working groups can easily take ownership of a chapter/strategy and work on executing the actions.

Timeline and Budget

| | Month | | | | | | Hours | Cost |
|---|-------|---|---|---|---|---|------------|-----------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | | |
| Establishing a Baseline Understanding | | | | | | | | |
| Existing plan review | x | | | | | | 12 | \$1,980 |
| Steering Committee interviews | x | x | | | | | 8 | \$1,320 |
| Steering Committee meeting* | | x | | | | | 20 | \$3,300 |
| Strategy Identification | | | | | | | | |
| Best practice research and interviews | | x | x | | | | 18 | \$2,970 |
| Ideation session* | | | x | | | | 20 | \$3,300 |
| Steering Committee meeting* | | | | x | | | 20 | \$3,300 |
| Strategic Plan Development | | | | | | | | |
| Strategy development | | | | x | x | | 45 | \$7,425 |
| Steering Committee meeting* | | | | | x | | 20 | \$3,300 |
| Final plan development | | | | | | x | 12 | \$1,980 |
| Labor Subtotal | | | | | | | 175 | \$28,875 |
| *Travel costs | | | | | | | | \$500 |
| Total Estimated Fixed Cost Not to Exceed | | | | | | | | \$29,375 |