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Request For Proposals (RFP)

2025 Strategic Business Plan Update

<https://www.portofcoosbay.com/solicitations-public-notice>

RFP Issue Date:

Wednesday, February 19, 2025

RFP Submittal Closing Time and Date:

5:00 PM Pacific Time, Friday, March 14, 2025

Please email one (1) electronic copy to: solicitations@portofcoosbay.com

Contact Information:

Lanelle Comstock, Chief Executive Officer
Oregon International Port of Coos Bay
Office: 541 267-7678 / email: lcomstock@portofcoosbay.com

Request For Proposals (RFP): 2025 Strategic Business Plan Update

Overview

The Oregon International Port of Coos Bay (Port) is seeking proposals from qualified firms with expertise in planning and economic consulting services related to Port and/or long-term economic strategic planning activities, to assist the Port's Board of Commissioners and management staff in the review, analysis and identification of needed updates of the Port's 2015 Strategic Business Plan. The end product of this solicitation will be the development and publication of an updated and revised Oregon International Port of Coos Bay Strategic Business Plan.

Scope of Work

Please see the attached Scope of Work.

Proposal Content

Proposals must demonstrate current relevant experience with Ports and property and economic development planning. Proposals must outline the Proposer's ability to fulfill the requirements of the RFP and Scope of Work. If requested information is not provided for any reason, the Port may reject the proposal in whole as non-responsive.

Proposals may be submitted electronically (see cover page), formatted for 8 1/2" x 11" printing. Proposals must be clear and succinct and not exceed 15 pages, excepting explanatory appendices.

Proposals shall include the following:

1. **Letter of Submittal:** All proposals must contain a Letter of Submittal signed and dated by a person authorized to legally represent the Proposer (e.g, the President, Chief Executive Officer or Executive Director of a corporation; a managing partner if a partnership, or the proprietor if a sole proprietorship). Along with introductory remarks, the Letter of Submittal should include the following statements and information about the Proposer and any proposed subcontractors:
 - a. "This proposal may be released in total as public information in accordance with the requirements of the laws covering the same."
 - b. "This proposal and cost schedule shall be valid and binding for ninety (90) days following the proposal due date."
 - c. Name (and company name, if applicable), address, telephone number, and e-mail address of the individual or firm submitting the proposal.
 - d. Name, title, address, telephone, and e-mail address of the person or persons to contact who are authorized to represent the firm and to whom correspondence should be directed.
 - e. Proposer's Federal and State Taxpayer Identification Number.
 - f. Statement as to whether the Proposer is a resident bidder in accordance with Oregon law.

If following a review of this information, it is determined by the Port that a conflict of interest exists, the Proposer may be disqualified from further consideration for the award of a contract.

2. **Project Readiness:** The Proposal must outline the Proposer's understanding and ability to fulfill the Scope of Work.

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- a. **Organization:** Describe your organization, including date founded and ownership; experience working with other Ports; examples of your firm's services; and examples of other strategic planning projects.
 - b. **Personnel & Projects:** Provide the name(s) and resumes of key personnel who would be directly involved in providing services to the Port, and describe their relationship in the firm, the role they would play, their experience and years of service with the firm, and their current relevant project experience.
 - c. **References:** List at least three (3) references for whom similar work has been performed, including the name of the organization, date work was performed, name of contact person responsible for the service you performed within the last five years, address and telephone number.
3. **Project Outline:** The Proposal must contain an outline and timeline for completing the Scope of Work.
 4. **Cost Schedule:** The Proposal must include a cost schedule to fulfill the Scope of Work.

Submission of Proposals

All proposals must be received by 5:00 P.M. Pacific Time Friday, March 14, 2025, via email as indicated on the cover sheet of the RFQ invitation.

Proposals submitted after the specified time on the due date will not be considered. Firms submitting responses accept all risks of late delivery regardless of fault. The Port will not be responsible for unreadable or misdirected proposals sent in response to this Request for Proposals.

Selection Process

Responsive submittals to this RFP solicitation will be evaluated by Port staff. The evaluation team will review and evaluate each submitted proposal and report to the Board of Commissioners with a recommendation of the top three Proposers in prioritized order. The Board of Commissioners shall have access to all proposals and make the final selection.

The successful Proposer will be selected based on the following criteria:

1. Responsiveness to proposal specifications and required information
2. Understanding of project; familiarity with project and Port location
3. Recent experience with similar projects
4. Qualifications of project team
5. References
6. Ability to meet schedule
7. Fee for services performed

The Oregon International Port of Coos Bay's Board of Commissioners or an authorized representative of the Port reserves the right to reject any and all submittals and waive any and all formalities and irregularities in the submittal and evaluation process as they may be deemed in the best interest of the Port District. This RFP does not obligate the Port to pay any costs incurred by respondents in the

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preparation and submission of their RFP response. Additionally, the RFP does not obligate the Port to accept or contract for any expressed or implied services.

Note: In the Port's discretion, litigation, threatened litigation or previous unacceptable performance of a contract between the Port and a Submitter may be cause for rejection of a submittal for this strategic planning RFP solicitation, regardless of when that litigation, threatened litigation or previous unacceptable performance of a contract comes to the Port's attention, and regardless of how the Submitter's RFP response may have been scored. Submittals may also be rejected if Submitters use subcontractors or sub-consultants who are involved in litigation with the Port. Submitters who are concerned about possible rejection on this basis should contact the Port before submission of a response to this RFP solicitation for a preliminary determination of whether a submittal will be rejected.

Instructions to Proposers

Each Proposer shall certify with their proposal that:

- The Proposer has not discriminated against race, color, age, religion, sex, disability, genetic information, or national origin or emerging business enterprises in obtaining any required subcontracts;
- No officer, agent or employee of the Port who has a pecuniary interest in this solicitation has participated in the contract negotiations on the part of the Port;
- The Proposal is made in good faith and without fraud, collusion or connection of any kind with any other Proposer;
- The Proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm;
- The Proposal will not be made in the interest of or on behalf of any undisclosed person, partnership company, association, organization, or corporation;
- The Proposal is genuine and not collusive or sham;
- The Proposer has not directly or indirectly induced or solicited any other entity submitting a proposal to place a false or sham proposal, and has not directly or indirectly colluded, conspired, or agreed with any other entity submitting a proposal or anyone else to place a sham proposal or that anyone shall refrain from submitting proposals;
- The Proposer submitting a proposal has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the ultimate contract price of the Proposer or any other Proposer, to fix overhead, profit, or cost element of the contract price, or of that of any other Proposer, or secure any advantage against the public body awarding the contract.

Revisions to the RFP

In the event it becomes necessary to revise any part of this RFP solicitation, addenda will be emailed to Proposers for whom communications of interest in any form have been received by Port staff. Upon issuance, such addenda shall be incorporated in the RFP solicitation and shall prevail over inconsistent provisions of earlier issued RFP documentation.

The Port also reserves the right to cancel or to reissue the RFP, in whole or in part, prior to any announcement of selection of any individuals or companies for follow up interviews.

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Minority and Women-Owned Business Enterprise Participation

In accordance with Oregon Public Contracting regulations, this RFP solicitation encourages participation by Minority and Women-Owned Business Enterprises (MWOBE). Participation may be either on a direct basis in response to this RFP solicitation or as a subcontractor to a Proposer. However, unless required by federal statutes or regulations, no preference will be included in the evaluation of RFP submittals and no minimum level of MWOBE participation shall be required as condition for follow up interviews in the selection of a consultant for professional consulting services, and RFP submittals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

Responsiveness

All proposals will be reviewed by the RFP Manager(s) to determine compliance with administrative requirements and instructions specified in this RFP solicitation. Failure to comply with any part of the RFP may result in rejection of the submittal as non-responsive. The Port reserves the right, however, at its sole discretion to waive minor, non-material irregularities.

Costs to Propose

The Port will not be liable for any costs incurred by the Proposer(s) in preparation of a submittal for this RFP solicitation, or any other activities related to responding to this RFP.

No Obligation for Follow-up Interviews or Acceptance of Any Proposals

This RFP does not obligate the Port to conduct any follow up interviews with any Proposer or to accept any proposals for updating the Port's Strategic Business Plan.

Rejection of Submittals

The Port reserves the right, at its sole discretion, to reject any and all submittals for this RFP solicitation without penalty, not to issue invitations for follow-up interviews, or to accept any proposals for updating the Port's Strategic Business Plan.

Single Proposer

In the event that only one response or submittal is received for the RFP solicitation, the Port may reject such proposal at its sole discretion.

Notification to Proposers

Individuals or companies whose RFP submittals are not selected for follow up interviews will be notified via e-mail.

Contract Conditions and Requirements

The Proposer who is awarded the contract for the Project shall be required to enter into a contract with the Port that shall contain the Standard Contract Provisions of the Port's Professional Services Contract, including the following clauses or conditions:

1. The Proposer shall not permit any lien or claim to be filed or prosecuted against the Port on account of any labor or material furnished in the performance of the work required by this project.

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2. The contract shall contain a clause where the Proposer agrees to defend, indemnify and hold the Ports harmless from any and all losses resulting from or arising out of the activities of Proposer or, agents, or employees in performing the contract.
3. The contract shall contain a clause that will require all disputes arising out of the contract to be arbitrated, and the contract shall also contain a clause providing for an award of attorney fees to the prevailing party.
4. The contract shall contain a clause, or clauses, requiring the Proposer to furnish, at its own cost, general liability insurance coverage, and such other insurance as the Port may require. A complete list of the insurance coverage required under the contract is contained below.

Insurance and Bonds

The selected Proposer shall, at its expense, obtain and maintain during the period of the Contract for this project, in a form and with companies satisfactory to the Port, the following insurance coverage:

- Workers' Compensation insurance to meet fully the requirements of Oregon Workers' Compensation laws applicable in connection with the death, disability or injury of Contractor's officers, agents, servants or employees arising directly or indirectly out of the performance of this contract, with a waiver of subrogation against the Port, and each additional insured identified herein.
- Employers' Liability Insurance with Limits of not less than One Million Dollars (\$1,000,000) each accident, One Million Dollars (\$1,000,000) policy limit for disease, and One Million Dollars (\$1,000,000) each employee for disease.
- Commercial General Liability Insurance with a combined single limit of not less than One Million Dollars (\$1,000,000) per occurrence and an aggregate limit of Two Million Dollars (\$2,000,000) for injury to or death of persons and damage to or loss or destruction of property. Such policy shall be endorsed to provide products and completed operations coverage and contractual liability coverage for liability assumed under this Contract. In addition, said policies shall be endorsed to name the Port and its divisions, officers and employees as additional insured's and shall include a severability of interests provision.
- Automobile Liability Insurance with a combined single limit of not less than One Million Dollars (\$1,000,000) each occurrence for injury to or death of persons and damage to or loss or destruction of property. Said policy or policies shall be endorsed to name the Port and its divisions, officers and employees as additional insured's and shall include a severability of interests provision.
- Professional Liability Insurance, including errors and omissions coverage, with limits of not less than \$1,000,000.00 per occurrence and \$2,000,000.00 policy aggregate.

Proposer will be required to furnish certificates of insurance to the Oregon International Port of Coos Bay, 125 W. Central Avenue, Suite 300, Coos Bay, OR 97420, certifying the existence of such insurance. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled, reduced in coverage or limits or not renewed without thirty (30) days advance written notice to the Port.

With respect to the Commercial General Liability, Automobile Liability, Professional Liability and Coverages Proposer agrees to waive all rights of subrogation against the Port and each additional insured identified herein, and all such insurance shall be primary and without right of contribution from any insurance maintained by the Port.

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The Port reserves the right to review, investigate and reject insurance companies proposed to be used by Proposer if they are determined inadequate to provide the necessary coverage as herein specified. All insurance required herein to be purchased and maintained by Proposer shall be obtained from an insurance company licensed or authorized in the State of Oregon to issue the insurance policies for the limits and coverage required herein and carry a minimum Best's rating of "A-VI" or better.

Hold Harmless

The Proposer shall hold harmless, defend, and indemnify the Port and the Port's officers, agents and employee against any liability that may be imposed upon them by reason of the Proposer's failure to provide worker's compensation coverage or liability coverage.

Appeals

Proposers who wish to appeal a disqualification or the award of the contract may submit the appeal in writing to the Chief Executive Officer of the Port within five (5) working days of the emailed Notice of Award disqualification. Disagreement with the process (e.g., scoring by evaluators) is not subject to appeal. The appeal must describe the specific citation of law, rule, regulation or practice upon which the appeal is based.

Title VI Non-Discrimination Clause

It is the policy of the Oregon International Port of Coos Bay (Port) that no person shall on the grounds of race, color, age, religion, sex, disability, genetic information, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination in any operation of the Port as provided by Title VI of the Civil Rights Act of 1964 and related statutes.

This policy applies to all operations of the Port, including its contractors and anyone who acts on behalf of the Port, and to the operations of any department or agency to which the Port extends state and federal financial assistance.

Prohibited discrimination may be intentional or unintentional. Seemingly neutral acts that have disparate impacts on individuals of a protected group and lack a substantial legitimate justification are a form of prohibited discrimination. Harassment and retaliation are also prohibited forms of discrimination.

Examples of prohibited types of discrimination based on race, color, age, religion, sex, disability, genetic information, or national origin include: denial to an individual of any service, financial aid, or other benefit; distinctions in the quality, quantity, or manner in which a benefit is provided; segregation or separate treatment; restriction in the enjoyment of any advantages, privileges, or other benefits provided; discrimination in any activities related to highway and infrastructure or facility built or repaired; and discrimination in employment.

Any person who believes they have, individually or as a member of any specific class of persons, been subjected to discrimination based on race, color, age, religion, sex, disability, genetic information, or national origin has the right to file a formal complaint with the Port. A formal complaint will immediately initiate an investigation process. Additional information can be found on the Port's website. Investigation resulting in a finding of discrimination from a contractor will result in cancellation of the contract.

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Inquiries

All inquiries related to this RFP are to be directed to the contact person indicated on the cover sheet of this RFP. Inquiries will be accepted by mail, phone or email. Inquires should be directed to:

Lanelle Comstock, Chief Executive Officer
Oregon International Port of Coos Bay
125 W. Central Avenue, Suite 300, Coos Bay, OR 97420-0311
Phone: 541 267-7678 / Email: lcomstock@portofcoosbay.com

Information obtained from sources other than those indicated previously is not official and should not be relied upon for completion of the RFP. Inquiries and answers that could substantially affect any portion of the response to the RFP may be distributed to all potential respondents at the Port's option.

Estimated Schedule of RFP Evaluation Activities

Request For Qualification (RFP) Evaluation Process	Date(s)
Issue Request For Proposals (RFP)	February 19, 2025
Proposal Due Date	March 14, 2025
Evaluate Proposals	March 17 – 21, 2025
Conduct interviews if needed	March 24 – 28, 2025
Announce results of RFP process and send notification via e-mail to all Proposers	April 1 – 4, 2025
Work Completion Date	November 1, 2025

Note: The Port reserves the right to revise this schedule as needed.

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Scope of Work

2025 Strategic Business Plan Update

The Port of Coos Bay updated its Strategic Business Plan (SBP) in 2015. This project is to update and revise the 2015 plan.

Task 1. General Project Management

Progress updates will occur on a regular basis by the end of each month so reports can be made to the Commissioners at the subsequent monthly meeting. In-person meetings will be scheduled as needed at key milestones.

Task 2. Public, Community, and Agency Outreach

The consultant shall develop a community outreach plan for the SBP process, including creative ways to engage and gather diverse community input, and issue press releases at key stages of the SBP development process. Consultant shall also engage Regional and Legislative partners.

The adoption process will include at least two work sessions with the Port Commission. Consultant shall facilitate the Strengths, Weaknesses, Opportunities and Threats (SWOT) workshop and work with Port staff to agree on format and list of invitees.

Task 3. Data Collection and Inventory

Consultant shall compile existing, relevant data on Port history, mission goals, work plan, and objectives from previous plans. Consultant team shall conduct a startup meeting with staff and Commissioners and a site visit to conduct visual assessment of the Port's layout, facilities, and situation in the community with respect to the SBP elements required in the following template.

Task 4. Draft Strategic Business Plan

Working with Port Staff, Commission, and the SWOT process results, develop an objectives statement as well as goals and policies for the SBP, identify current and future Port markets, future years revenue projections, strategies, and priorities. Develop draft SBP, with alternative strategies, as appropriate.

Task 5. Final Strategic Business Plan

Based on comments from Port Staff, stakeholders, and Commissioners, revise the draft plan for presentation at outreach meetings listed in Task 2. Once the SBP is adopted, finalize and deliver an editable electronic version in Word format, and an electronic version in PDF format.

Strategic Business Plan Template

1. Port History & Mission:

- a. History: Brief introductory statement summarizing when the Port was established and for what purposes
- b. Mission Statement: What is the Port's current mission and why?
- c. Mission Statement Definitions:
- d. Overall Goals: Brief thumbnails of the Ports overall goals for specific areas.
 - i. Charleston Property & Facilities

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- ii. North Spit Property & Facilities
 - iii. East Bay Property & Facilities
 - iv. North Bay Property & Facilities
 - v. Terminal One Property & Facilities
 - vi. Coos Bay Rail Line
 - vii. Navigation Channel
 - viii. Hub Building
 - ix. Management
 - x. Financial
 - xi. Environmental
 - xii. Etc.
- e. Strategic Plan prepared using funds provided by OECD and through a public process (describe).

2. Port Overview:

a. Port Description:

- i. Operations, Facilities & Property: What activities are the Port engaged in and what facilities does it operate and own? Describe and categorize property and facility types (marine, aviation, industrial, commercial, recreational, etc.)
- ii. Revenue Centers: What activities or facilities does the Port derive operational income from? Do those facilities generate enough revenue to cover their capital costs over time?
- iii. Non-revenue Activities: What activities or facilities does the Port operate or own that don't generate income and/or require ongoing subsidies? Do any of those facilities or amenities contribute to revenues generated from other Port activities or facilities?

b. Port Resources:

- i. Operational: What revenue does the Port derive from operations, both before and after depreciation is accounted for?
- ii. Non-operational: What tax or other ongoing non-operational revenues (timber receipts, Marine Board maintenance grants, FAA funds, etc.) does the Port receive? Are Port properties included in an Urban Renewal District generating monies for specific Port projects?
- iii. Outside Sources: What is the annual average of grant dollars the Port has received during the past 5 years and what have they been used for?

c. Port Policies and Procedures:

- i. Operating Procedures: What is the management structure and what is the division of authority between management and the Commission? All policies and procedures should support the Port mission statement.
- ii. Governances: Does the Port have established governances and what do they say about the division of authority, Commission conflict of interest, a requirement that the Commission follow proper procedures, and a clear definition of fiduciary responsibility and conflict of interest? Include governances as an appendix to the plan.

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- iii. Commission: Who is on the board, how long have they been on the board, and what are their backgrounds? Briefly restate what the governances require of Commissioners and what their roles and responsibilities are. Have they undergone Board Training?
 - iv. Staff/Professional Development: Identify organizational structure, key staff, how long they've been with the Port, and what they're professional background and expertise are. Talk about the Port's policy on professional development – both for staff and the Commission – and identify as best you can professional development goals for key staff and the Commission.
- d. Financial and Market Conditions:
- i. Competition: What are the Port and the community's competitors (Other ports, other facilities, other communities or regions)? Do Port activities and facilities compete with private operations in the region?
 - ii. Existing Markets: What existing markets are served by the Port and communities facilities (Examples: recreational fishermen from Southern Oregon; local manufacturers looking to expand; small footloose manufacturers looking to relocate from high cost locations; retirees from California, etc.)?
 - iii. Port Resources & Financial Condition: What are the Port's resources (operational surpluses, staff capacity) and assets (industrial land, buildings, other facilities) and what is the trend in the Port's financial condition and capacity?
 - 1. Total Assets
 - 2. Port Equity
 - 3. Debt, etc.
3. **Defining the Problem**: Intent is to tie the Port's development efforts to the economic needs and opportunities of the communities they serve.
- a. District Demographic Profile (Income, Poverty, Education, etc.): Most of this information can be obtained from the Oregon Employment Division's Regional Profiles and from the underlying Census data.
 - b. District Economic Profile (Workforce, Unemployment, Key Industries): Most of this information can be obtained from the Oregon Employment Division's Regional Profiles.
 - c. Trends for Regional Key Industries: Which industries are growing, which are mature (flat) and which are declining?
 - d. Industry Trends for State and Nation: Which industries are growing, which are mature (flat) and which are declining?
 - e. Analysis: How does the district's income, poverty and educational levels compare to the state and the nation? How are the demographics of the district changing? What's happening with the region's workforce and what are the job trends for the region? What's happening with the region's key industries (manufacturing, tourism, natural resources, services, etc.) – which are growing, which are declining – and how does that contrast with state and national trends?
4. **Policy Context**:
- a. Threshold Statement: Strategic Plan has been prepared with funding from OECDD and based on the template provided by OECDD. The Port is committed to following its governances and this

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Strategic Plan. The Port will update its five-year capital plan and its goals and objectives annually as part of the annual budgeting process. Sitting Commissioners have undergone board training and have agreed on procedures for handling conflict-of-interest issues and have agreed to follow best practices and fiduciary responsibility as defined above. Flexibility has been provided in the plan to allow for unanticipated business opportunities that contribute to the Port's economic development or revenue enhancement goals.

- b. Environmental Issues: Discuss the Port's environmental values, practices and policies, and what the Port's role is in addressing local and regional environmental issues.
 - c. Statewide Planning Goal 9 – Economic Development: How has and is the Port addressing Goal 9 (ownership of industrial or commercial lands or buildings; pursuing opportunities to purchase and develop industrial and commercial lands)? Are there properties available that would enhance the Port's ability to meet its economic development and revenue goals? Does the Port have adequate resources to do so?
 - d. Statewide Planning Goal 12 – Transportation: How has and is the Port addressing Goal 12? What transportation facilities (marinas, docks, airports, etc.) does the Port own or operate? Are the Port's transportation projects and needs included in local and regional Transportation Plans?
 - e. Statewide Planning Goal 17 – Water Dependent Use: What is the applicability of Goal 17 to Port waterfront lands? Does property need to be preserved for maritime cargo activity or other marine-related activities? Is there waterfront property that could or should be redeveloped to increase economic activity, support local services and provide increased revenues for the Port?
 - f. Statewide Port Strategic Plan Recommendations: Address relevant recommendation.
 - g. Other Local and Regional Plans: Reference other community, county and regional economic plans and describe how they relate to the Port's plan? If other plans reference key industries or opportunities, how does the Port plan to address them?
 - h. Political Context and Analysis: Characterize the working relationship of the Port with the county, local cities and special districts. What interest or advocacy groups are involved with local issues and how can they engaged or consulted. Are demographic changes driving changes in local and regional public perceptions and attitudes?
5. **Situational Analysis** – in context of district demographic/economic profile.
- a. SWOT: Strengths, Weaknesses, Opportunities and Threats
 - b. Critical Issues: What issue or issues does the Port face that if left unaddressed would result in a serious erosion of the Port's facilities, revenues or capacity?
 - c. Demand Analysis: What type of demand is growing in the local and regional economy (housing, retail, etc.) based on key industry trends? What type of demand is decreasing? How do the Port's assets match up with demand and opportunity?
 - d. District Needs: Given demand, economic needs and the Port's assets, capacity and resources, what kinds of projects and strategies can the Port most effectively pursue to address the economic needs of its district and its residents?
 - e. Risk Analysis: What are the biggest risks facing the Port in pursuing strategies to achieve its economic development and revenue goals, including political risk?
6. **Goals and Objectives**:
- a. Property Goals: (Marine, Aviation, Industrial, Commercial, Recreational, etc.)

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- i. Background and Status
 - ii. Strategic Objectives
 - iii. Action Plan
- b. Management Goals:
 - i. Policies and Procedures
 - ii. Staffing
 - iii. Staff and Board Development
 - iv. Emergency Management Procedures and Protocols
- c. Financial Goals:
 - i. Property Acquisition
 - ii. Debt Management
 - iii. Depreciation
 - iv. Reserves
- d. Environmental Goals:
- e. Marketing Goals:
 - i. Background and Status (for all above)
 - ii. Objectives (for all above)
 - iii. Action Plan (for all above)

7. Facilities and Business Plan:

- a. Five-Year Capital Plan: Based on Property goals and objectives, updated annually as part of budget process.
- b. Management Plan: Based on Management goals and objectives, updated annually as part of budget process. Includes Professional Development and Board Development goals.
- c. Financial Plan: Based on Financial goals and objectives, updated annually as part of budget process.
- d. Environmental Plan: Based on Environmental goals and objectives, updated annually.
- e. Marketing Plan: Based on Marketing goals and objectives, updated annually.

8. Attachments and Exhibits: