

Jefferson County Development Authority (JCDA)

Request for Proposals (RFP): Specialized Implementation & Financial Strategy Services for the 2026–2030 Strategic Plan

RFP Number: RFP-2025-03

Issue Date: October 31, 2025

Proposal Due Date: November 14, 2025 by 3:00 p.m. EST (electronic or hard copy)

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Submission Address: Jefferson County Development Authority (ATTN: Krista Hoffman), 1948 Wiltshire Road, Suite 4, Kearneysville, WV 25430

1) Topline Description and Intent

JCDA is soliciting proposals from domain experts and firms to produce discrete, expert-level work products—financial models, feasibility analyses, capital stack strategies, and implementation roadmaps—that will be assembled by JCDA staff into the Authority’s 2026–2030 Strategic Plan.

This RFP is intentionally **modular**. Proposers may submit for **one or more** of the defined project areas. JCDA may make **multiple awards** and expects to issue task orders per award.

If a single firm proposes to deliver all project areas, that firm should also include a fee to **compile and produce the final integrated plan** (layout, formatting, executive summary, and internal crosswalks). Otherwise, JCDA staff will compile the final plan from awarded work products. JCDA recognizes that a modular RFP can produce coverage gaps; therefore, JCDA reserves the right to commission bridging analyses or synthesis task orders to ensure continuity across awarded scopes.

The JCDA Board has a 1–3 year public mandate to demonstrate **competence, ambition, and measurable progress**. Accordingly, deliverables must be **practical, costed, and time-phased**—with depth in **Year 1** and **Years 2–3**, and a clear outlook through **Year 5**.

2) Background

JCDA is the lead economic development authority for Jefferson County, West Virginia, positioned at the edge of the Washington–Baltimore region with strong outdoor, agricultural, and industrial assets. The 2026–2030 Strategic Plan prioritizes site readiness, revenue independence, sector-specific growth (manufacturing, craft beverage, food systems), and differentiated recreation tourism. JCDA will rely on **specialist consultants** to deliver the technical mechanics and wayfinding toward execution—**capital formation, deal structuring, regulatory strategy, operational design, and KPI frameworks**.

3) Project Areas, Scope, and Deliverables

Expectations for each proposal:

- **Countywide Situational & Benchmark Analysis (All Respondents):** While addressing each specific project area, proposers should include a situational assessment that frames Jefferson County’s current economic position relative to peer counties. This should include:
 - A concise SWOT (strengths, weaknesses, opportunities, threats) analysis.
 - A comparison to at least 2–3 similarly sized U.S. counties that have demonstrated measurable success in economic diversification or revenue independence.
 - Identification of what has worked and not worked in comparable jurisdictions, with quantified outcomes where available.
- **Workplan & Roadmap:** 0–12 months, 13–36 months, 37–60 months (Gantt or equivalent).
- **Financials:** Transparent Excel models (unlocked) with sources/assumptions tabs; 5-year pro forma; sensitivity; funding stack and timing. *ROI Analysis:* Each financial model must include projected public and private investment levels, estimated returns to tax base and employment, and a payback horizon.
- **KPIs:** Quarterly, trackable board-facing metrics that would show economic development progress toward each goal; leading and lagging indicators; data sources.
- **Risk Register:** Key risks, triggers, mitigations, decision gates.
- **Implementation Aids:** Checklists (permits, compliance), partner map, draft MOUs/term-sheet outlines as appropriate.
- **Evidence:** Citations to datasets/benchmarks; 2–3 comparable case notes.

A. New Business Park Development Strategy

Goal: Deliver an executable plan for a multi-phase, revenue-producing business park near the Jefferson Orchards/Miller area with multiple shovel-ready sites.

Scope:

1. **Site Readiness:** phased utilities (gas, electric, water/sewer, broadband), road ingress/egress, stormwater.
2. **Target Markets:** 3–4 priority industry profiles (e.g., advanced manufacturing, clean tech, food systems/craft beverage incubation, govcon suppliers).
3. **Delivery Model:** Pad-ready vs. build-to-suit; lease vs. sale pricing model; covenants and design standards.
4. **Capital Stack:** TIF/STIF feasibility, P3 structures, bondability, grants; cash flow waterfall to support JCDA revenue independence.
5. **Milestones:** Permitting path; 12-month critical path; prospecting toolkit.

Deliverables: Phasing plan; site utilities matrix; absorption model; pricing strategy; financial model with base/low/high cases; prospect kit and marketing plan to secure best-suited business park tenants.

B. Land Bank and Property Acquisition Strategy

Goal: Establish a self-sustaining land bank advancing three buckets—farmland access, commercial redevelopment, and workforce/entrepreneur housing.

Scope: Governance under WV Code §7-12; intake/prioritization rubric; hold/flip/leasing strategies; CRA-aligned bank partnerships; philanthropic; resale and rent-to-own models; tax lien/tax sale interfaces.

Deliverables: Operating model, 5-year capitalization plan, portfolio strategy, standard term-sheet templates, legal/policy checklist, KPI dashboard (e.g., assets acquired, value unlocked, cash-on-cash to JCDA).

C. Integrated Food Hub, Meat Processing, and Craft Beverage Incubation Facility

Goal: Feasibility and operating plan for a shared-use USDA-certified **meat processing + aggregation/cold chain + fermentation/craft beverage** incubator—**potentially sited within the new business park.**

Scope: Throughput targets by line; regulatory and waste handling; equipment list & capex; tenanting and shared-use policy; training/apprenticeship linkages; market demand analysis; logistics; TIF use; USDA/ARC/EDA funding stack; pricing and membership models.

Deliverables: Facility program, floor plan concept, 5-year P&L and cash flow with ramp; rate card of what it could cost various users to access the facility; governance and tenant policies; funding calendar and readiness checklist.

D. Countywide Trails, Biking, and Sports Tourism Study

Goal: Define a **differentiated sports/outdoor tourism and placemaking strategy** built around: cycling/hiking and connectivity among the Appalachian Trail, C&O Canal Tow Path, Harpers Ferry, Shepherdstown, Summit Point Motorsports Park, and adjacent county trail systems; any strategic or niche sports tourism opportunities that might exist.

Scope: Trail connectivity and gap analysis; visitor and event market sizing; **options/suggestions analysis** like (i) festival series, (ii) a “DC to Harpers Ferry–Shepherdstown” biking challenge, (iii) a niche/signature sports championship venue **if** justified; sponsorship/naming rights for various elements; municipal linkages; year-round programming; and 10-20 sites/properties that are adjacent to an integrated biking/walking trail network that are either existing agritourism assets or suitable for new or expanded agritourism asset development, anything from new glamping sites to wineries and tasting room sites to experiences that tap into the historic nature of the area, pumpkin and berry patches or Christmas tree farms, and other agritourism concepts and experiences for tourists and the local community alike.

Deliverables: Route and infrastructure map set; event calendar concept; sponsorship model; 5-year impact model; permitting/partner checklist; first-12-month activation plan.

E. Business Retention and Expansion (BRE) and Attraction Strategy

Goal: Define a unified framework for both retaining and expanding existing employers and attracting new investment across the County.

Scope: Inventory of existing business base (by sector, employment, tax yield). Gap analysis of missing or declining sectors. *Retention tactics:* succession planning, incentives for reinvestment, technical assistance, and recognition programs. *Attraction tactics:* target-sector prospecting, site readiness needs, incentive benchmarking, and infrastructure dependencies. *ROI framework:* typical capital investment, jobs, and tax yield projections by target industry.

Deliverables: BRE/Attraction action plans related to cluster development or strategic economic trend opportunities, 5-year prospect pipeline model, cost-benefit analysis.

F. JCDA Strategic Performance and Implementation System

Goal: A board-facing performance system that unifies tracking, reporting, and accountability across all initiatives.

Scope: KPI tree (business attraction/retention, capital leveraged, site readiness, marketing, partner engagement); quarterly board dashboard; data management (CRM, web/social analytics); public transparency cadence (quarterly/annual); resourcing implications.

Deliverables: KPI dictionary, dashboard mockups (and optional Tableau/Power BI spec), SOPs for data collection, first-year reporting calendar.

4) Qualifications and Teaming

- **Core qualifications:** Demonstrated expertise matching the project area(s) selected; examples of comparable **work products** (not just narrative plans).

- **Financial rigor:** Proficiency building transparent models; ability to frame TIF/STIF/P3, Opportunity Zone investment, and grant stacking where appropriate.
- **Implementation orientation:** Evidence of roadmaps that reached execution (e.g., funding secured, projects delivered).
- **Local/regional familiarity** preferred; WV experience a plus but not required if methods are transferable.
- **Teaming encouraged:** Prime/sub or JV proposals welcomed to combine specialties.

5) Proposal Format (per project area)

1. **Cover letter** and project areas proposed.
2. **Understanding and Approach** (≤5 pages per area): problem statement, key uncertainties, proposed methods, data sources, and risk posture.
3. **Workplan and Schedule:** 0–12, 13–36, 37–60 months deliverable timing; stakeholder touchpoints with JCDA staff; decision gates.
4. **Team and Roles:** key personnel bios; level of effort table (hours by role).
5. **Relevant Work Products:** 2–3 comparable deliverables (links or appendices).
6. **Budget and Pricing:** fixed-fee by deliverable plus hourly rates card; optional alternatives (e.g., milestone-based fees).
7. **Assumptions and JCDA Inputs Needed** (e.g., data access, partner interviews, existing studies).
8. **Conflicts and Disclosures.**

If proposing for all areas, include an additional section: **Integration and Final Compilation** (scope, schedule, team) and fee for compiling the final Strategic Plan document (design, formatting, executive summary).

6) Anticipated Procurement Schedule

- RFP issued: **October 31, 2025**
- Proposals due: **November 14, 2025 (3:00 p.m. EST)**
- Interviews (optional stage): **December 4-5, 2025**
- Notice of intent to award by no later than: **December 17, 2025**
- Contract negotiations / task-order scoping: **December 2025 – January 2026**
- Initial task orders commence: **January 2026**

JCDA reserves the right to adjust dates by addendum.

7) Evaluation and Quality Scoring

Evaluation Criteria and Quality Points (per project area)

Proposals will be considered based on quality score and Board deliberation. There may be multiple awards.

- **Technical Approach and Methods** — 25 pts
- **Relevant Expertise and Team Capacity** — 25 pts
- **Financial Rigor and Implementation Feasibility** (models, capital stacks, risk) — 20 pts
- **Work Samples Quality and Relevance** — 10 pts
- **Availability and Schedule Realism** — 10 pts
- **Price/Value** — 10 pts

Total: 100 pts

8) Contract Structure & Payment

- **Master Services Agreement (MSA):** One MSA per awardee with **task orders** issued per scope.
- **Payment:** Fixed-fee by milestone; retainage up to 10% until final acceptance.
- **Data & IP:** All work products, models, and code are **work-for-hire** and become JCDA property; consultants may reuse generic frameworks.
- **Confidentiality:** Standard non-disclosure provisions; public records compliance.

9) Administrative Requirements

- **Questions:** Submit to khoffman@jcda.net with subject line “RFP-2025-03 Question – [Firm Name]”.
- **Submission:** One (1) electronic PDF to khoffman@jcda.net by the deadline; optional one (1) hard copy to the address on page 1 (arriving by the deadline).
- **Proposal Validity:** 120 days from due date.
- **Insurance:** Evidence of professional liability and general liability upon award, as needed.
- **References:** Three (3) client references for comparable work.
- **Debarment:** Proposer must certify it is not debarred from public contracting.

10) Terms, Conditions, and Reservations

- **Right to Waive/Reject:** JCDA may waive minor irregularities or reject any/all proposals.
- **Best and Final Offers:** JCDA may request BAFOs.
- **Negotiation:** JCDA may negotiate scope, staff, price, and schedule.
- **Public Records:** Proposals are subject to WV Freedom of Information Act. Mark proprietary sections clearly; JCDA will follow applicable law but cannot guarantee confidentiality of all materials.
- **No Obligation:** Issuance of this RFP in no way obligates JCDA to award a contract or to pay any costs incurred in proposal preparation.

11) Submission Checklist (Per Project Area)

- Cover letter identifying selected project areas
- Understanding & approach (≤5 pages per area)
- Workplan & schedule (phased 0–12, 13–36, 37–60 months)
- Team bios & level of effort table
- Comparable work products (links or appendices)
- Budget (fixed-fee by deliverable) + rates card
- Assumptions & required JCDA inputs
- References
- Required certifications
- If proposing ALL areas: integration/compilation scope & fee

[END OF RFP DOCUMENT]