

REQUEST FOR PROPOSALS

U.S. Soybean Export Council from Consultants for Strategic Planning Facilitation Services

January 5, 2021

OVERVIEW

The U.S. Soybean Export Council is a non-profit trade association that represents the stakeholders of our founding members, the American Soybean Association (ASA) and the United Soybean Board (USB), a set that includes all the soybean farmers in the United States, as well as 103 USSEC members drawn from all parts of the U.S. soy export supply chain. The Membership list can be found at this link: <https://ussec.org/directory/member-directory/>

We are seeking proposals for a consultant to assist our USSEC team which includes staff members, volunteer U.S. soybean grower leaders, volunteer USSEC board members and many stakeholders representing our members and partners. The applicant should demonstrate capacity in successfully developing consensus-based strategic plans, strong facilitation skills across diverse audiences, and proven experience with strategic plans for non-profit trade organizations. Desired, but not essential, is experience with agricultural marketing non-profit organizations, particularly those that receive funds from sources including farmers' commodity checkoffs, the USDA Commodity Credit Corporation (CCC) and USDA Foreign Agricultural Service (FAS,) and from members. Firms demonstrating capacity and experience with innovative approaches to the strategic planning process are desired.

Scope: Complete an update of USSEC's Organizational Strategic Plan which will guide our work as an implementing contractor of International Marketing and Market Access Programs for USB, FAS, ASA, and Qualified State Soybean Boards (QSSBs) with the goal of differentiating, building preference and ensuring market access for U.S. Soy. This plan should include:

- Key focus areas for the organization – what should we keep doing, start doing, stop doing as we strive to be a top, world class marketing organization serving our stakeholders in the U.S. and around the world.
- Highlighting the USSEC Core Values as foundational for the organization. <https://ussec.org/about-ussec/> and <https://ussec.org/ussec-announces-core-values-winners/>
- Key partnership opportunities for the organization – how best to structure existing partnerships and others we should consider.
- Organizational models that USSEC can consider to optimize effectiveness.

Process:

- Inclusive information gathering sessions, prior to starting the process, to gather inputs and suggestions – participants would be the consultants facilitating the process and select USSEC Board/Staff Members.
 - Possible 1:1 discussion with various stakeholders to gather inputs, conducted by phone or video call or other means.

- Timeline developed for the process early so all know the requirements and the deliverables including the schedule we will follow.
- Direct involvement with relevant parties as outlined below:
 - Staff to be heavily involved in the “work” as it goes along, but with regular check-in and decision-making opportunities for the USSEC Board of Directors who will be the approver of the finished product. Staff leaders to be assigned as key contacts for the consultant to ensure ready access and prioritization.
 - Formation of a “USSEC Board Strategic Plan Steering Committee” to work with the consultant and USSEC staff on a regular basis.
 - Creation of an “Principal’s Council” made up of USB, FAS, ASA, and QSSB representatives that are consulted regularly as the process moves forward to seek their guidance, direction, etc.
 - Creation of an “Advisory Council” made up of USSEC Members that are consulted regularly as the process moves forward to keep them informed of the status of the process and to seek feedback/input.

Deliverables:

- Guide USSEC through this strategic planning development process as outlined above.
- Monthly management updates.
- Strategic Plan Document and a set of Overview Documents (including Powerpoint slides summarizing the process and outcome, handouts with final strategic plan and others) with varying levels of detail for distribution to the USSEC Board, USSEC Staff, USSEC Members and USSEC Global Stakeholders.
- Strategic Plan Communication Tools that USSEC Board and staff leaders can use during rollout.
- Internal Guidance Document including recommendations on organizational structure, strategic partnerships, and other learnings.

DRAFT Timeline:

- | | |
|--|--|
| <ul style="list-style-type: none"> • January 5, 2021 • January 22, 2021 • February 5, 2021 • February 17, 2021 | <p>RFP released for consulting firm to help USSEC through this process.</p> <p>RFP Submissions due</p> <p>Consultant selection finalized</p> <p>USSEC Board Meeting</p> <ul style="list-style-type: none"> ○ Strategy Planning Process shared and discussed. ○ Teams formed or at least concepts agreed. |
| <ul style="list-style-type: none"> • March-April 2021 | <p>Monthly Meetings of the Strategic Planning Steering Committee commence.</p> <ul style="list-style-type: none"> ○ Principal’s Council Meeting to discuss process. ○ Advisory Council formed and information sessions commence. |
| <ul style="list-style-type: none"> • April-May 2021 | <p>Heavy into info gathering sessions with Stakeholders, Staff.</p> |
| <ul style="list-style-type: none"> • May-June TBD | <p>Initial concepts shared at USSEC Executive Committee Fly-in</p> <ul style="list-style-type: none"> ○ Possibly, joint session with the Strategic Plan Steering Committee. ○ Possibly, joint listening session with Advisory Council. |
| <ul style="list-style-type: none"> • June 2021 | <p>Work with Strategic Planning Steering Committee and Staff continues</p> <ul style="list-style-type: none"> ○ Ongoing dialogue with the Advisory Council and Principal’s Council. |
| <ul style="list-style-type: none"> • July 2021 | <p>Unveiling of the DRAFT Plan</p> <ul style="list-style-type: none"> ○ USSEC Exec Committee. ○ Principal’s Council. ○ Advisory Council. ○ Full USSEC Board Virtual Meeting. ○ USSEC Membership Informational Webinar. |

- August 2021

Board Approves final plan at Board Meeting.

PROPOSAL GUIDELINES

Proposal Deadline: January 22, 2021; 5:00 PM CST

Submit proposals via email to: rfp@ussec.org with the following subject line: USSEC Strategic Plan Facilitation Proposal – Firm Name

Proposals are to be submitted in PDF (Portable Document File) format not to exceed 10 single sided pages, font no smaller than 10pt. If the file is too large for email, a link to the file should be provided. Late arrivals will not be accepted. Mail submissions will not be accepted. It is the responsibility of the bidder to ensure that the response is received by USSEC by the closing submission date. A response may be excluded from further consideration if it is not received by the deadline or does not follow the specified format.

Proposals should include the following information:

- Thorough description of approach to strategic planning and facilitation and timeline
- A summary of strategic planning capacity and experience with examples of similar projects completed within the last 1-2 years (specific examples of working with other collaborative or consensus-driven initiatives to create an evergreen strategic vision and strategic plan are highly encouraged.)
- A thorough work plan including a detailed project timeline, with the strategic plan to be presented for approval to the Board no later than August 2021. The work plan should include the specific activities to be conducted at each stage, milestones and deliverables tied to those activities.
- A listing of the project team, their role(s) and relevant experience
- Detailed project budget including all projected reimbursable expenses
- Three client references that can attest to the experience and capabilities of the consultant on similar areas of work

QUALIFICATIONS

The ideal consultant will possess the following qualifications:

- Demonstrated experience with world class and industry-leading facilitation methods
- Experience at successfully developing consensus-based, evergreen strategic plans.
- Understanding and ability to facilitate highly innovative approaches to the strategic planning process.
- Strong facilitation skills with diverse audiences.

- The ability to foster a collaborative, engaging, and inclusive environment with diverse stakeholders.
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors.
- Competency at gathering, analyzing and synthesizing data to inform the strategic planning process.
- Knowledge of cutting-edge strategic planning technology and software as applicable.
- Ability to constructively challenge key stakeholders, resulting in higher quality and more accurate outcomes.
- Demonstrated experience inspiring others to think innovatively.

ADDITIONAL QUESTIONS

Direct additional questions to Charles Hall, chall@ussec.org and Eric Gibson, egibson@ussec.org.

INSTRUCTIONS:

Proposals must contain at a minimum the specific criteria listed below:

1. Please email the proposal to rfp@ussec.org by 5:00PM central U.S. time on January 22, 2021.
2. A description of prospective contractor's capabilities, resources and experience. Emphasis should be placed on experience related to this RFP.
3. A thorough proposal outlining prospective contractors planned work, deliverables and timeline to complete the work.
4. Resumes for each of the Prospective Contractor's personnel assigned to work directly on the implementation of the contract.
5. Provide a minimum of two names and contact information for other similarly sized clients for reference purposes.
6. Detailed Budget
 - a. All bids for services must provide a breakout of how the fee was derived including but not limited to a breakdown of hourly rate and the amount of effort they anticipate to do the work.
7. Proposals should be no longer than **10 pages** (8 ½" x 11").

NOTES:

- Prospective Contractors are hereby notified that proposals will be duplicated for internal review only. Every effort will be made to maintain confidentiality of all information presented. The appropriate representatives from staff and legal counsel will review proposals. Proposals will not be returned.
- USSEC reserves the right to retain all proposals submitted. Submission of a proposal indicates acceptance by the submitter of the conditions contained in the request for proposal, unless clearly and specifically noted in the proposal submitted

and confirmed in the contract between USSEC and the contractor selected.

- Confidentiality - Without USSEC's prior written consent, Prospective Contractors and its officers, employees, agents, representatives, affiliates, and subcontractors shall not disclose to any third party any documents, materials or information that the Prospective Contractors learns from or is provided in relation to the RFP request.
- During the evaluation process, USSEC reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors and omissions.
- USSEC reserves the right to reject any proposal that is in any way inconsistent or irregular. USSEC also reserves the right to waive proposal defects or deficiencies, to request additional information, and/or to negotiate with the Prospective Contractor regarding the proposal.
- Prospective Contractor agrees that Fees are in lieu of any and all other benefits, including, but not limited to, repayment of any and all taxes related to contractor service fees, health and life insurance, administrative costs and vacation.
- Prospective Contractor agrees that any income taxes, value added taxes or any other form of direct or indirect taxes on compensation paid under the contract shall be paid by Contractor and not by USSEC or Funding Sources.
 - o Prior to any payment to a Contractor, a contractor must provide a W-9, W-8, or W-8BEN upon agreement signature
- Non-Competition. Contractor shall not act as agent or representative for any product or service directly or indirectly competitive with U.S. soybeans or soybean products for the length of the contract.
- USSEC and Prospective Contractor agrees to comply with the provisions of Equal Employment Opportunity (EEO). USSEC provides EEO to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.

SUPPLEMENTAL INFORMATION AND BACKGROUND

BUILDING A PREFERENCE FOR U.S. SOY

USSEC's strategy can be found here: <http://ussec.org/about-ussec/vision-mission/>

USB's Long Range Strategic Plan can be found here: <http://unitedsoybean.org/about-usb/strategic-planning/>

We are a dynamic partnership of key stakeholders representing soybean producers, commodity shippers, merchandisers, allied agribusiness and agricultural organizations. Through a global network of international offices and strong support in the U.S., we help build a preference for U.S. soybeans and soybean products, advocate for the use of soy in

feed, aquaculture and human consumption, promote the benefits of soy use through education and connect industry leaders through a robust membership program. Our 15-member board of directors is comprised of four members from the American Soybean Association (ASA), four members from the United Soybean Board (USB), and seven members representing trade, allied industry, and state organizations.

New board members are seated annually. We are receiving funding from a variety of sources including soy producer checkoff dollars invested by the USB and various state soybean councils; cooperating industry; and the American Soybean Association's investment of cost-share funding provided by the United States Department of Agriculture's (USDA) Foreign Agriculture Service.

The United Soybean Board, created by the 1990 Farm Bill to manage and direct the National Soybean Checkoff, is dedicated to marketing and research for the soybean industry. USB is comprised of 73 volunteer soybean farmers representing the interests of fellow growers nationwide. Each board member is nominated by Qualified State Soybean Boards (QSSBs) and appointed by the U.S. Secretary of Agriculture.

Because of the limitations on administrative and salary costs established in the Act, USB outsources the majority of its program management responsibilities to USB's three primary contractors:

- SmithBucklin-St. Louis for domestic marketing, new uses, production research and Board initiative activities.
- Osborn & Barr Communications for communications/public relations activities and;
- U.S. Soybean Export Council (USSEC), Inc. for international marketing and global opportunities activities.

As one of these three primary contractors USSEC may also undertake initiative activities on behalf of USB. USB considers primary contractor staff (approximately 60 people) as core USB staff. These three primary contractors use a number of subcontractors and, together, these entities carry out approximately 450 projects each year for USB. USB also manages approximately 10 subcontractors.

Non-Discrimination Statement

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program

information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 {voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) [email:program.intake@usda.gov](mailto:program.intake@usda.gov).

USDA is an equal opportunity provider, employer, and lender.

Civil Rights Clause

Contractor agrees that during the performance of this Agreement it will not discriminate against any employee or applicant for employment because of race, color, religion, gender, national origin, age, disability, political beliefs, sexual orientation, marital or family status, parental status or protected genetic information. Contractor further agrees that it will fully comply with any and all applicable Federal, State and local equal employment opportunity statutes, ordinances and regulations, including, without limitation, Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act of 1990, the Age Discrimination in Employment Act of 1967, and the Equal Pay Act of 1963. Nothing in this section shall require Contractor to comply with or become liable under any law, ordinance, regulation or rule that does not otherwise apply to Contractor.