

## STRATEGIC PLAN RFP

### Purpose / Overview

The **Cleveland–Cuyahoga County Port Authority (Port of Cleveland)** invites qualified consulting firms to submit proposals to lead a comprehensive strategic planning process that will chart the Port’s direction for the next three to five years.

With new leadership in place, the Port is entering an exciting period of reflection and renewal — seeking to elevate its role as a regional economic catalyst, strengthen its position as a collaborative partner across public and private sectors, and ensure that its operations, investments, and partnerships are helping drive Northeast Ohio’s long-term growth and competitiveness.

The Port operates at the intersection of commerce, finance, and community. Its work spans three primary lines of business:

- **Maritime operations**, connecting Northeast Ohio businesses to national and global markets via the Great Lakes–St. Lawrence Seaway system;
- **Development finance**, providing catalytic financing tools that spur job creation and investment; and
- **Sustainability & public infrastructure**, advancing transformational projects such as Irishtown Bend and CHEERS that enhance lakefront access, resilience, and livability.

Through this strategic planning process, the Port aims to update its vision, priorities, and organizational design to ensure it is best positioned to drive inclusive economic growth for the region. The process will engage internal and external stakeholders, benchmark best practices from leading U.S. and international ports and economic development finance entities and translate those lessons into a clear, Cleveland-specific, actionable roadmap for implementation.

The plan should wrestle with, analyze, and answer a core set of overarching strategic questions<sup>1</sup>:

#### *Foundational (must be answered clearly)*

- How can the Port of Cleveland have even more impact on the regional economy and help position Northeast Ohio for growth?
- How can the Port align with and help advance key regional priorities and partnerships?
- Where should the Port be growing? What existing programs, tools, or capabilities should be leveraged — and what new ones should be developed?

#### *Design and Governance*

- Which organizations should the Port be partnering with, and how should it structure itself organizationally for success?
- Are the Port’s current mission and vision statements appropriate for where the Port is going over the next three to five years?

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<sup>1</sup> Not all questions are of equal weight; proposers should demonstrate judgment in prioritizing and sequencing decisions.

#### *Measurement and Accountability*

- What impact metrics and KPIs should the Port track and report to demonstrate progress and accountability?

Proposers should demonstrate how their approach prioritizes these questions and resolves tensions among them, rather than treating them as independent or equal considerations.

Ultimately, the selected consultant will deliver a plan to position the Port of Cleveland to:

- Strengthen its economic impact and regional leadership role
- Build strong, mutually reinforcing partnerships with businesses, government, and community stakeholders
- Advance climate resilience, sustainable maritime operations, and equitable development
- Create a results-driven culture that aligns people, resources, and strategy around measurable outcomes

The Port views a successful strategic plan as one that is bold but implementable; clearly differentiates where the Port will lead versus partner; provides concrete, near-term actions alongside longer-term direction; and results in measurable changes to how the Port deploys its assets, capital, staff time, and partnerships.

#### **Consultant Qualifications**

Proposing teams should ideally demonstrate:

1. Subject-matter expertise across the Port's major lines of business:
  - a. Development finance (public finance, bond funds, project underwriting, community-impact funds).
  - b. Maritime operations (with demonstrated Great Lakes port experience).
  - c. Planning & public infrastructure (particularly public waterfront/lakefront projects and beneficial use of dredge material).
2. Track record of thinking big, boundary-pushing, and innovation in strategic planning
3. Proven stakeholder engagement capability with examples of comprehensive engagement plans that include elected officials, municipal/regional partners, anchor employers, community organizations, tenants, customers, and labor.
4. Benchmarking experience developing case studies from relevant organizations (peer ports, statewide/local development authorities, national public finance intermediaries, and other public infrastructure leaders).
5. Organizational design expertise — ability to assess and recommend organizational structure, governance, staffing, roles/responsibilities and change management pathways.
6. Implementation & performance orientation — demonstrated development of implementable strategic plans with clear deliverables, realistic timelines, KPIs, dashboards and mechanisms for monitoring and course corrections.

The Port welcomes joint proposals from consulting firms that collectively possess the subject matter expertise and strategic planning experience needed to meet the Port's requirements. To

facilitate collaboration, the Port will circulate the names and contact information of firms that express interest in pursuing this RFP.

### **Scope of Work & Deliverables**

The Port expects a multi-phase process consistent with the strategic plan framework below. Proposers should propose a detailed approach, timeline, deliverables and estimated level of effort and cost for each item.

#### **Phase A — Research & Baseline Analysis**

- **Detailed evaluation** of current Port operations, existing strategic planning documents, KPIs, financials, economic impact, and overall performance
- **Market & trend scan** including Great Lakes and national maritime trends (cargo tonnage, supply chain shifts, tariff impacts), decarbonization and fuel transitions, federal funding landscape, dredging and beneficial-use innovations, and public development finance
- **Peer case studies** identifying leading ports/organizations and key strengths and innovations in each of the Port's key business lines
  - Maritime (focus on Great Lakes peers)
  - Development finance (Ohio ports, national public finance intermediaries),
  - Sustainability/public infrastructure (public actors advancing waterfront and resilience projects)
- **Financial & asset review** including assessment of balance sheet capacity, bond fund performance, real estate holdings, operating surplus deployment, and the Community Impact Fund (structure and outcomes).
- **SWOT / gap analysis**

***Deliverable A1: Baseline report and briefing to Board & Steering Committee<sup>2</sup>.***

#### **Phase B — Stakeholder Engagement**

- **Stakeholder mapping** and outreach plan
- **Engagement activities:** Board workshops (min 2), staff sessions (min 2), elected officials roundtables (1-2), customer/tenant interviews (~5), community listening sessions (2-3, including neighborhood stakeholders impacted by development finance and waterfront projects), and key partner interviews (5-10, including Cleveland Metroparks, City of Cleveland, U.S. Army Corps of Engineers, Great Lakes and St. Lawrence Seaway stakeholders, regional economic development partners).
- **Synthesis** of stakeholder input highlighting aspirations, concerns, and partnership opportunities

***Deliverable B1: Stakeholder engagement summary and themes report.***

#### **Phase C — Strategy Development (answers to Overarching Questions)**

The Plan must explicitly address the Overarching Strategic Plan Questions in the framework (pages 1-2 of this RFP). Key outcomes required:

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<sup>2</sup> Proposers will work with a 9-member strategic planning committee consisting of staff leadership and key board members.

- **Vision, mission, values** — refine/confirm or recommend updates.
- **Business-line strategies & goals** — for Maritime Operations, Development Finance, and Sustainability & Public Infrastructure. Each business-line section must include:
  - Strategic objectives and rationale
  - Specific initiatives and prioritized investments (short/medium/long term)
  - Revenue/impact considerations and risk profile
  - KPIs and numeric targets where feasible
  - Partnerships required and roles for the Port vs. partners
  - Clear articulation of where the Port should lead, co-lead, or support – and where it should not play a role
- **Tradeoffs**
  - What should the Port stop or de-emphasize to do the priority work well?
  - Where does focus matter more than breadth?
  - What initiatives look attractive but do not align with the Port’s comparative advantage?
  - How recommended tradeoffs affect capital allocation, staffing capacity, and political or stakeholder capital

Strategic recommendations must be accompanied by an assessment of whether the Port’s current organizational structure, staffing model, and internal capabilities can realistically deliver them or adjust to do so.

The strategic planning process should provide answers to specific business-line questions (these are examples — the consultant should address each and any others they deem material):

- **Maritime**
  - How does the Port of Cleveland help businesses in Northeast Ohio? How can we help them grow? What is the Port’s competitive advantage or value proposition for local businesses?
  - How can the Port of Cleveland help attract businesses to Northeast Ohio?
  - What is the most impactful piece of our maritime operations for Northeast Ohio’s economy?
  - How can we buck the trends towards reduced tonnage and cargoes through the Great Lakes?
  - What future maritime trends on the Great Lakes should we be planning for?
  - What are the bets or investments we can make which will have the greatest ROI in terms of regional economic impact?
  - What role should the Port of Cleveland be playing in advocacy around the St Lawrence Seaway?
  - How should the Port position maritime operations and advantages for a future where climate change threatens coastal resiliency on coastal ports?
- **Development Finance**
  - How do we grow our impact on Northeast Ohio with our development finance tools? What are the most impactful ways we can be using our tools? Are there best practices statewide and nationally we can be tapping?
  - How can we get more creative on uses/applications of our tools? How can we use them in different ways?

- How can we use our tools to align with and support key catalytic regional initiatives? Which initiatives should we focus on?
  - How can we better align our development finance efforts with our other lines of business (public infrastructure and maritime)?
  - Should we be leading or initiating projects with our financial tools?
  - What is the right articulation of our risk tolerance, including recommended guardrails and decision thresholds, for:
    - Bond fund
    - Balance sheet
    - Real estate ownership
    - Real estate development activity
  - What criteria should we use to evaluate projects we will finance? What is the right balance between supporting development and supporting projects with community benefit?
  - How can we use our tools to benefit smaller and more diverse developers?
  - How can we best drive more impact that matters to residents in neighborhoods?
  - What return thresholds should we be targeting for financial and community impact?
  - How can we use our balance sheet to drive more economic impact? Are there development finance/economic impact uses for our operating surplus that generate higher ROI than match for port infrastructure grants?
  - Is the community impact fund set up the right way, and is it generating the highest community ROI that it can?
  - Beyond traditional ROI, what existing community-level metrics should the Port monitor or adopt – leveraging data from regional partners – to better understand our contribution to the ‘community good’ without requiring us to serve as the primary data collection or monitoring entity?
- **Sustainability & Public Infrastructure**
    - What is the Port’s unique value-add in public infrastructure and sustainability relative to other public actors, and where does that value diminish?
    - With Irishtown Bend wrapping up, are there other planning and infrastructure challenges we should be tackling?
    - Should we expand our public infrastructure efforts beyond those which are immediately port-adjacent (ITB, CHEERS)?
    - What role should the Port play in lakefront development? Planning for the future of Burke? Housing?
    - How do we align with key regional partners on infrastructure priorities and best position ourselves for federal and state funding
    - How might the Port’s existing and future infrastructure projects serve as a ‘learning lab’ – providing a platform for innovation and regional partnership without expanding our core operational mandate?

***Deliverable C1: Draft Strategic Plan (including strategies, prioritized initiatives, KPIs, organizational recommendations) and one-page strategy map.***

## **Phase D — Organizational Assessment & Implementation Planning**

- **Organizational structure assessment:** current staffing, capabilities, gaps, recommended org design and job types (not necessarily individual job descriptions but role-level recommendations)
- **Implementation roadmap:** prioritized actions (12/24/36 months), owners, estimated costs, funding strategy and dependencies
- **Immediate actions:** specific steps within the first 90 days required to launch the strategy, including Board actions, management decisions, and external communications
- **Dashboard design:** interactive or report-based dashboard concept / prototype for tracking KPIs and plan progress

Recommendations should distinguish between changes that are required for strategy execution versus those that are optional or aspirational.

***Deliverable D1:*** Organizational assessment memo and final Implementation Plan + KPI Dashboard prototype.

## **Phase E — Finalization & Board Adoption**

- Incorporate feedback from Port staff and Board; finalize plan for Board review and adoption.
- Presentations: executive summary presentation for Board, full plan presentation, and community-facing one-page summary and marketing rollout plan.

***Deliverable E1:*** Final Strategic Plan, Board presentation materials, community summary.

## **Proposal Content & Requirements**

Proposals are due February 2, 2026, and should include:

1. **Executive Summary (2 pages max)** – Provide an overview of the firm(s), relevant experience, and understanding of the Port’s priorities and strategic goals.
2. **Technical Approach & Workplan** – Describe the proposed methodology for each project phase, including key activities, timeline with milestones, and staff assignments.
3. **Team Composition & Resumes** – Identify key personnel, their roles, percent of effort, and any subconsultants. Include brief resumes highlighting relevant qualifications.
4. **Relevant Experience & Case Studies** – Provide at least three examples of similar projects, including client, project scope, outcomes, and a contact for reference.
5. **Project Schedule** – Start date and timeline to final delivery, with major milestones indicated.
6. **Budget & Fee Proposal** – Provide a detailed cost breakdown by phase, including hourly rates, not-to-exceed total, and anticipated reimbursable expenses.
7. **Deliverables** – List expected project deliverables and their proposed format.
8. **References** – Minimum of three client references with contact information.
9. **DBE/Small Business Participation**<sup>3</sup> – Describe participation, if applicable, and any relevant certifications or qualifications.
10. **Insurance & Legal** – Provide a summary of professional liability insurance coverage and any other applicable legal requirements.
11. **Conflict of Interest Statement** – Confirm no actual or potential conflicts of interest exist. If any conflicts are identified, describe them and include a proposed plan for managing/mitigating them to ensure impartiality and transparency throughout project.

## **RFP Schedule**

All correspondence regarding the RFP and submissions should be by email only to [Melisa.Freilino@portofcleveland.com](mailto:Melisa.Freilino@portofcleveland.com)

• RFP issuance:	January 5, 2026
• Expression of Interest <sup>4</sup> :	January 12, 2026
• Deadline for questions:	January 19, 2026
• Question responses posted	January 23, 2026
• Proposals due:	February 2, 2026
• Finalist interviews	Week of February 16, 2026
• Selection & contract negotiation	Week of February 23, 2026
• Project start:	Mid-March, 2026
• Draft plan to Board:	4Q 2026 <sup>5</sup>

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<sup>3</sup> While all proposals will be evaluated on merit, qualifications, and cost, the Port encourages participation from Minority-Owned, Female-Owned, and Small Business Enterprises. Respondents that meet these criteria may provide this information as part of their submission and it may be considered as one factor among others in the evaluation process, in accordance with applicable laws and regulations.

<sup>4</sup> The expression of interest is not mandatory, but firms that are open to collaborations should submit the firm name and contact information to the Port by email before January 12, 2026.

<sup>5</sup> Consultants may propose alternative schedule if justified

The strategic planning committee will evaluate proposals across the following criteria:

- Understanding of the Port's role and context
- Strength of proposed approach to meet the Port's needs
- Relevant experience in strategic planning and across Port's business lines
- Team composition
- Cost will be evaluated for reasonableness and value relative to scope and approach, not as a standalone lowest-bid criterion.

The Port is not seeking a generic or purely aspirational strategic plan. Proposals that rely heavily on off-the-shelf frameworks without clear customization to the Port's context, assets, and constraints may be deemed non-responsive.