

## **Melrose Plaza Request for Proposals for Banking Center**

**Name of Company:** Goodwill Industries® of The Valleys  
**Project Name:** Melrose Plaza  
**Project Manager:** Zenith Barrett  
**Date:** 1/5/2023

Goodwill is requesting proposals for a retail banking center at the Melrose Plaza Campus.

### **Background**

Goodwill Industries of the Valley's vision and mission is to eliminate poverty by empowering individuals, strengthening families, and inspiring communities. Goodwill is proud to be part of the Northwest (NW) community and is committed to collaborating and contributing to the strength and resilience of our community.

Goodwill has partnered with the City of Roanoke, public and non-profit partners, as well as community stakeholders on a community collaborative to invest and restore the NW area by re-designing the Goodwill Roanoke Jobs Campus, located at 2502 Melrose Ave NW.

Goodwill's Roanoke Jobs Campus is a centralized location, consisting of approximately 90,000 square feet. The renewed community campus, called The Melrose Plaza, will include services such as a full-service grocery store, wellness center, an adult high school, and a banking center. This campus will address the disparities within the NW area and serve as a pillar to contribute to the economic vitality in the community.

Services for the Melrose Plaza campus are slated to launch in December 2024.

### **Scope of Services**

Goodwill is seeking proposals from financial institutions for a retail banking center onsite at the Melrose Plaza. The financial institution's banking services may include but not limited to the following:

- Business & Personal
- Checking & Savings
- Loans & Financing
- Financial Literacy seminars
- Individual Coaching
- Credit Counseling

The banking center spacing includes a minimum of 2500 to a maximum of 4000 square footage. The cost per square footage is dependent on the nature and extent of buildout desired but is anticipated to be in the \$11.00 - \$14.00 range per square foot per year.

### **Term Commitments**

It is the intent to award the contract for an initial 5-year period with the option to renew for an additional 5-year period.

## **Proposal Submission**

Financial institutions must provide a proposal that contains the following information:

- Company overview to include organizational structure and history
- Two years of financial statements
- Scope of work to include management approach
- Proposed banking services and spacing needs to include square footage
- Provide suggested project schedule with timeline, deliverables, and expected final service delivery.
- Comprehensive list of what is needed from Goodwill

To be considered, financial institutions must submit proposals via email by January 27, 2023, no later than 5:00 pm (ET).

All proposals must be submitted to Zenith Barrett, VP of Business and Community Engagement, via email at [zbarrett@goodwillvalleys.com](mailto:zbarrett@goodwillvalleys.com)

## **Evaluation Criteria**

The RFP seeks financial institutions to provide onsite banking services at the Melrose Plaza. The evaluation will be conducted based on the factors and criteria listed below.

- Company overview and qualifications
- Scope of services and management approach
- Financial Strength
- Services and spacing needs
- Compliance with financial institution regulations

## **RFP Schedule & Timeline**

### **January 2023**

- Issue RFQ by January 5, 2023
- Written questions due by January 13, 2023, no later than 5pm (ET).
- Responses to questions due by Friday, January 20, 2023, no later than 5pm (ET)

### **February 2023**

- Proposals due from financial institutions by Friday, February 3, 2023, no later than 5pm (ET).
- Review proposals and make selections by Friday, February 10, 2023.
- Implementation/Construction: The design process for the Melrose Plaza will occur in the first 10 months of 2023 and construction is expected to complete by Q4 2024.

## Key Personnel

Name of Key Personnel	Role / Title
Zenith Barrett	Vice President, Business & Community Engagement <a href="mailto:zbarrett@goodwillvalleys.com">zbarrett@goodwillvalleys.com</a>
Brandy Tabor	VP of Real Estate and Risk Management <a href="mailto:btabor@goodwillvalleys.com">btabor@goodwillvalleys.com</a>
Jackson Green	Chief Financial Officer <a href="mailto:jgreen@goodwillvalleys.com">jgreen@goodwillvalleys.com</a>

All questions regarding the RFP should be submitted by January 13, 2023, end of business day to Zenith Barrett via email at [zbarrett@goodwillvalleys.com](mailto:zbarrett@goodwillvalleys.com)