



Request for Proposals

STRATEGIC PLANNING CONSULTANT FOR NONPROFIT

Background/Introduction

EcoLatinos was originally founded in 2015. In 2018 EcoLatinos, Inc. received 501(c)(3) designation, allowing us to take the lead in developing environmental stewardship programming with the Latino community of the Chesapeake Bay region. Before nonprofit designation, ecoLatinos, LLC operated primarily as outreach consultants on a project-by-project basis.

At this time, ecoLatinos primarily supports the mission of non-profit, private, and public organizations through contracting work as we create connections with Hispanic and minority communities in the region. We have provided numerous opportunities for community engagement through bilingual environmental stewardship programs. Our work aligns with that of many other environmental organizations along the Chesapeake Bay, but we are unique in our focus and commitment to social and environmental justice, by engaging and advocating for Spanish-speaking and traditionally under-represented communities.

With funding support from the Chesapeake Bay Funders Network and the Trust awarded in October 2019, EcoLatinos, Inc. is seeking an expert consultant to guide us in the creation of a Strategic Plan focused on fulfilling our mission to empower diverse communities in efforts to restore the Chesapeake, Coastal Bays, and Youghiogheny watersheds.

Project Goals and Scope of Services (Maximum Bid: \$10,000)

The purpose of this request is to invite experienced strategic planning consultants to submit a proposal to facilitate a strategic visioning and planning process as ecoLatinos transitions to a 501(c)(3). We seek a consultant who has demonstrated experience in developing strategic plans for newly established nonprofits through a participatory process. The plan must be centered around the needs of diverse communities like those we serve.

The consultant will lead a strategic planning process with a committee comprised of EcoLatinos board of directors, staff and a selected group of stakeholders. The goal of that process is a comprehensive five-year strategy and budget framework with considerations for future directions beyond five years.

Strategic plan expectations and deliverables:

The strategic planning process must include:

1. Stakeholder research that engages with environmental groups and funders in the Chesapeake Bay region whose missions overlap with ecoLatinos' work. This research will entail conducting and analyzing interviews, surveys, and/or focus groups with these stakeholders. This research will ultimately inform the content of ecoLatinos' strategic plan, and should therefore seek stakeholders' perspectives on: (1) ecoLatinos' role in achieving shared environmental goals and inclusion of underrepresented communities in current and future environmental programs; (2) ecoLatinos' role in advancing these goals over the next 5 years and beyond, and (3) how ecoLatinos can align organizational goals with existing funding sources and opportunities.
2. Group meetings with ecoLatinos' advisory committee to discuss the results of the stakeholder research process and facilitate development of ecoLatinos' strategic vision and plan based on the research results.
3. Development of a plan for monitoring and evaluating the implementation of the strategic plan. This should include qualitative or quantitative metrics of progress toward achieving ecoLatinos' goals.

The strategic plan that results should clearly articulate the niche or roles filled by ecoLatinos, relative to other groups and funders working on similar issues in the region. By identifying the specific roles that ecoLatinos can fill to have the greatest impact within the diverse communities served, the strategic plan will help to guide ecoLatinos' program development and partnership strategies. The plan should also include a budget analysis for each element of the plan.

Proposal format and additional requirement elements.

The proposal must include the following:

1. A concise (≤5 page) proposal that addresses each of the "Strategic plan expectations and deliverables" outlined above.
2. A budget including total number of hours and hourly rate of compensation for the services to be performed during the term of the Contract.
 - a. Consulting Time/Costs: broken down in the following manner:
 - i. Strategic Planning: # of hrs. @ \$/hr.

- ii. Stakeholder Engagement: # of hrs. @ \$/hr.
 - iii. Other: e.g., Materials, postage etc.
 - iv. Total Costs
3. Contact Information:
 - a. Name of consultant/firm
 - b. Address
 - c. Email address
 - d. Phone number
 - e. Best time to reach and schedule of availability during the strategic planning process
 4. Resume:
 - a. Include a most recent resume on the staff/consultant assigned to this project
 - i. This should include information on education, position in firm, years and type of experience, continuing professional education, etc.
 5. References:
 - a. A list of three clients you have provided similar services in the past five years. For each reference, please include:
 - i. Name of client/organization
 - ii. Address
 - iii. Email address
 - iv. Phone number
 - v. Scope of services provided
 6. Firm/Consultant Description:
 - a. Description of the organization including size, structure, mission statement or business plan, scope of work, and commitment to diversity and equality (i.e. if woman or minority owned).

Anticipated Selection Schedule

RFP Published:	February 4, 2020
Proposals Due:	March 3, 2020
Consultant Selection Announcement:	March 17-18, 2020
Contract Finalization:	August 7, 2020

We anticipate the consultant selection process to take place between **March 4, 2020 and March 16, 2020**. The strategic planning process will begin immediately following consultant selection, based on a timeline agreed upon by the consultant and ecoLatinos. We expect all services to be completed and submitted by the contract finalization date. Consultants may reach out until the due date with any questions regarding the organization and our projects.

Prospective Offerors:

An "Offeror" is a person or entity that submits a proposal in response to this RFP.

Minimum Qualifications of Offeror:

1. Five or more years of related experience in strategic planning consulting;
2. Background working with diverse populations
3. Expertise in different engagement and communications approaches
4. Six or more years of experience in training groups of 10+ people in engagement approaches.
5. Ability to deliver long term strategic planning services for environmental focused organizations in the DC metropolitan area.

Proposal submission information

1. Proposals can be submitted via email to Ruby Stemmler at ruby@ecolatinos.org
2. Please include "EcoLatinos Strategic Plan RFP" in the subject line.

Deadline for Proposal Submissions: **March 3, 2020, Eastern Standard Time**

Principal Solicitation Officer and Issuing Office:

Name of Organization:	EcoLatinos, Inc.
Address:	5836 Dewey Street, Cheverly, MD 20785
Contact Person:	Ruby Stemmler, CEO
Telephone Number	240-564-1256
Email Address of PCP	ruby@ecolatinos.org

Evaluation procedure and criteria

1. **Qualifying Proposals:** The Contract Officer will review each proposal for compliance with the minimum qualifications set forth in "Minimum Qualifications of Offeror."
2. **Deviations and Negotiation:** The Contract Officer shall have the sole right to determine whether any deviation from the requirements of this RFP is substantial in nature, and the Contract Officer may reject non-conforming proposals. In addition, the Contract Officer may waive minor irregularities in proposals, allow an Offeror to correct minor irregularities, and negotiate with responsible Offerors in any manner deemed necessary or desirable to serve the best interests of the Project.

3. **Evaluation Criteria:** Proposals that meet the minimum qualifications will be evaluated on the basis of the following factors:
 - a. Proposed Consultant Responsible for Performance of Contract. Evaluation of the qualifications, reputation, and compatibility with the needs of ecoLatinos and the individual or individuals who will perform the Contract.
 - b. Proposed Approach. Evaluation of the work to be performed to accomplish the goals outlined in the Scope of Services.
 - c. Experience of Offeror. Evaluation of the quality and quantity of the Offeror's experience and expertise in the areas proposed.
 - d. Capacity. Evaluation of the Offeror's ability and commitment to meet the timeline for the Project.
 - e. Price. Cost of the project.

Additional information

If you require additional clarification or have questions about the following terms, please contact ecoLatinos.

1. **Expenses:** ecoLatinos, Inc. is not responsible for any direct or indirect expenses that an Offeror may incur in preparing and submitting a proposal, participating in the evaluation process, or in consequence of this solicitation process for any reason.
2. **Sub-contracting:** The hired consultant may not subcontract out any of the work without pre-approval, all changes to the projected cost must be approved by ecoLatinos.
3. **Add/Deduct:** ecoLatinos reserves the right to add or remove items from the base bid proposal during the contract and modify or adjust the scope of work and payment as needed.
4. **Cancellation; Discretion of Contract Officer:** This RFP may be canceled in whole or in part and any proposal may be rejected in whole or in part at the discretion of the Contract Officer. In addition, the Contract Officer has the right to negotiate separately with any Offeror in any manner which will best serve the interests of ecoLatinos. The Contract Officer may waive any mandatory condition or minimum qualification if the Contract Officer determines that such action is in the best interest of ecoLatinos.
5. **Professional Liability Insurance:** The Offeror shall agree to maintain in full force and effect during the term of the Contract usual and customary amounts of liability insurance coverage in connection with the performance or failure to perform services under the Contract.

6. **Acceptance of Terms and Conditions:** By submitting a proposal in response to this RFP, a) the Offeror accepts all of the terms and conditions set forth in this RFP; b) the Offeror, if selected for award, agrees that it will comply with all federal, State, and local laws applicable to its activities and obligations under the Contract;
7. **Minority Business Enterprise (MBE) Program, the Disadvantaged Business Enterprise (DBE) Program, Women Business Enterprise (WBE), and Small Business Enterprise (SBE) Program Participation:** This RFP encourages the participation of MBE/DBE/WBE/SBE firms (members of a group as defined in the State Finance and Procurement Article of the Annotated Code of Maryland (the "Procurement Article"), Section 14-301(f)(i)(ii)). The Trust encourages MBE/DBE/WBE/SBE firms who meet the minimum qualifications to respond to this RFP.
8. **Parties to the Contract:** The contract to be entered into as a result of this RFP (the "Contract") shall be between the successful Offeror (the "Contractor") and ecoLatinos.
9. **Contract Documents:** The Contract shall include the following documents: this RFP, the Contractor's Proposal (to the extent not inconsistent with the RFP or the Contract), and the Contract. In the event of an inconsistency, the Contract shall have priority over the other documents and specific conditions of the Contract shall have priority over General Conditions.
10. **Contract Term.** The Contract term shall commence as of a date to be specified in the Contract and, unless terminated earlier in accordance with the Contract, shall end when all work authorized under the Contract has been successfully completed by the project end date, unless the Contract is renewed or extended at the sole option of the Contract Officer.
11. **Billing Procedures and Compensation.**
 - a. **Method:** The Contracts to be entered into as a result of this RFP will not exceed the small procurement threshold set by Federal Acquisition Regulation at 48 CFR Subpart 2.1 (Definitions) and in accordance with 41 U.S.C. 1908. The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and the funding organization. These may entail monthly reporting of time and eligible expenses or may be based upon satisfactory completion of benchmark tasks.
 - b. **Records:** The Contractor(s) shall submit invoices no more than once per month but no less than once per quarter in a form acceptable to the Contract Officer and maintain records relating to the costs and expenses incurred by the Contractor(s) in the performance of the Contracts for a period of two years from the date of final Project payment under the Contracts.