



Strategic Planning Consultant Request for Proposal (RFP)

Posting Date

Monday, November 21, 2022

Proposals Due

Friday, December 16, 2022, no later than 5:00pm ET

Purpose of the RFP

Blue Water Baltimore is seeking proposals from qualified consultants to assist with the design, development, and implementation of a multi-faceted process for our next five-year strategic plan (2024-2028).

About Blue Water Baltimore

The water quality of Baltimore's waterways has long been impacted by polluted stormwater runoff, trash, sewage, and toxic chemicals. Poor water quality harms the environment, threatens residents' health, and endangers the vitality of the local economy.

In 2010, five local grassroots environmental organizations joined forces as Blue Water Baltimore (BWB) to collectively address water quality issues in Baltimore. Since its founding, BWB has built an engaged base of more than 20,000 supporters. Now one of the largest environmental groups in Maryland, BWB informs, engages, and empowers people in Baltimore City and the surrounding region, working together toward a future where its streams, rivers, and Harbor are healthy, thriving ecosystems accessible and safe for residents, visitors, and commerce.

To achieve these goals, BWB monitors Baltimore area waterways for pollution, integrates arts and education into community greening and stormwater management projects, and works with an array of partners including communities, schools, congregations, and hospitals to effect change on the ground. In addition to restoration activities, we also monitor water quality in Baltimore's streams, rivers, and Harbor, investigate and take action to stop water pollution, and inform and mobilize residents in advocacy efforts for stronger clean water policies and programs, both locally and statewide. BWB unites residents, public agencies, and private partners to accomplish more by working together than any one group could do alone to restore and protect Baltimore's water quality.

Scope of Requested Services

BWB wishes to ensure that our next strategic plan has a solid foundation of a shared vision, leads to measurable goals that can effectively guide our ongoing and future work, fully embodies principles of equity and inclusion, and provides a cohesive roadmap for our next five years.

The planning process is expected to take approximately 6-9 months starting in early 2023. We anticipate that the new plan will be formally approved in the fall of 2023 and take effect no later than January 1, 2024.

We want to place equity, transparency, inclusiveness, vision, and practicality at the forefront of an inclusive and thorough process to develop the strategic plan. The planning process will be overseen by the Strategic Planning Committee but will involve and engage all stakeholder groups including BWB staff members, BWB leadership team, BWB current and former board members, BWB volunteers, community members, partner organizations, and funders.

We seek an experienced and engaging consultant to facilitate the strategic planning process. They should support us in taking a hard look at priorities and strategic direction while helping us ensure the planning process is stimulating and meaningful for stakeholders.

We have dedicated staff, board members, and volunteers who will participate in the planning process and assist with project management and various implementation tasks. We want to partner with a consultant who will help design and guide the process and lead key strategic planning tasks, including but not limited to:

- **Planning**
 - Inform overall design of strategic planning process
 - Create project plan and assist with planning process communications strategy
 - Participate in meetings with the Strategic Planning Committee as needed
- **Information Gathering and Analysis**
 - Develop creative methods for gathering and incorporating meaningful stakeholder input that ensures people feel heard and valued and accounts for power dynamics
 - Assist with survey design and focus group implementation
 - Conduct SWOT analysis and/or environmental scans as needed
 - Conduct interviews with key stakeholders as needed
 - Assist the Strategic Planning Committee in analysis of the information and identification of key takeaways and themes
- **Goals and Outcomes Development**
 - Work with the Strategic Planning Committee, leadership team, staff, and other stakeholders to create and prioritize key goals, objectives, and outcomes through an equity lens
- **Implementation**
 - Work with the Strategic Planning Committee, leadership team, staff, and other stakeholders to develop a system of measuring progress towards goals, objectives, and outcomes
- **Documentation and Communication**
 - Prepare initial draft plan for review and comment by stakeholders
 - Revise draft to address feedback and create final plan
 - Assist with strategic plan communications strategy and materials development

Service Period

The period of performance for the strategic planning consultant will begin no later than March 1, 2023 and end by December 1, 2023.

Proposal Submission Details

All proposals should be submitted electronically by email to Vanessa Pinkney vpinkney@bluewaterbaltimore.org. The subject line should be *Strategic Planning Proposal*. The deadline for submission is December 16, 2022, no later than 5:00pm ET. Hard copy proposals will not be accepted.

Responses become the property of BWB and may be subject to disclosure as requested upon completion of the process. Proprietary information that you wish to remain confidential should not be included in your response materials.

Questions related to this RFP should be emailed to vpinkney@bluewaterbaltimore.org no later than 5:00pm ET on December 5, 2022. All questions and the responses will be emailed to RFP respondents on December 9, 2022.

Proposal Requirements

The proposal should not exceed 15 pages, excluding resumes, previous work product, conflicts of interest, and cover letter. Responses should include:

1. Cover Letter

The cover letter should include:

- Point of contact address, telephone number, email address, and website
- A summary of qualifications and experience including similar work for environmental, nonprofit, or Baltimore-based organizations
- Any exceptions to the outlined scope of work
- Whether your firm is a minority or woman-owned business

2. Consultant Qualifications and Roles

The proposal should describe the consultant's qualifications to conduct the RFP scope of work as well as your expertise, knowledge, and experience. Experience should include examples of conducting similar or related strategic planning work, as well as experience working with environmental nonprofits. We believe the consultant should possess the following qualifications to be successful:

- Experience successfully developing consensus-based strategic plans that place equity at the forefront and consider every decision through an equity lens
- Experience gathering and utilizing data to inform the strategic planning process
- Knowledge of BWB's mission and programs and/or experience working with community-oriented environmental nonprofit organizations
- Strong facilitation skills and experience creating a neutral and productive environment to successfully solicit input from individuals from various stakeholder groups
- Project management experience
- Knowledge of communications, branding, budgeting, and resource development

If a consultant group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate:

- Which activities each consultant or team member will conduct
- How many hours they are estimated to contribute to each activity
- Information about their level of expertise, knowledge, and experience to conduct those specific activities, including any background working with environmental nonprofits

3. Work Plan

The proposal should contain a detailed description of the activities to be conducted by the consultant to complete the requested scope of work, including:

- Specific activities to be conducted at each stage including details of which are anticipated to be in person and which will be virtual or hybrid
- Timeline for the activities at each stage
- Milestones and deliverables tied to those activities

4. References

The proposal should include at least three references of individuals who can speak to their experience with the consultant in conducting projects of similar scope. Information regarding each reference should include the individual's name, address, telephone number, and email address. Submitting the references and proposal indicate consent for BWB to contact the references.

5. Previous Work Product

The proposal should include at least two examples of work similar to the scope of work requested within this RFP (i.e., strategic plan). We also encourage but do not require a list of similar work or clients in the last five years.

6. Conflicts of Interest

The proposal should disclose any possible conflict(s) of interest with BWB. Any previous research or support provided to BWB should be documented.

7. Price

The price proposal should include total costs for performing all tasks proposed in the work plan. Price should be broken out by major task and planned deliverable(s) and if billed based on hours should include proposed labor categories, their hourly rates, and number of hours. Any other cost, such as travel, etc. should also be provided.

The price proposal should describe all underlying budget assumptions and include a payment schedule tied to project milestones and/or deliverables.

Proposal Evaluation

Proposals will be evaluated using the following criteria:

- **Technical Approach and Methodology:** The proposal is complete and demonstrates strong technical capability and a sound understanding of BWB’s mission. The proposal sets out a logical approach/methodology to conducting an inclusive strategic planning process that is consistent with the proposed scope of work and places equity at the forefront.
- **Expertise and Experience:** The consultant demonstrates a background in strategic planning, effectively engaging stakeholders, and employing planning techniques that meet the needs of BWB’s culture and mission. The consultant demonstrates a proven track record in facilitating strategic planning processes with mission-driven organizations of similar size.
- **Past Performance:** The consultant has recent successful past performance that is relevant to the proposed project in terms of scope and complexity.
- **Price:** The proposal includes a detailed budget for each stage of the scope of work and the proposed costs are reasonable.

BWB reserves the right to determine which respondents have met the base requirements of this RFP. In addition, BWB may reject, in whole or in part, any and all proposals, waive minor irregularities in proposals, allow an offer to correct minor irregularities, and negotiate with all responsible efforts in any matter deemed necessary to serve the best interest of BWB.

BWB reserves the right to reject any and all proposals when such rejection is in the interest of BWB, to reject the proposal of a respondent who has not met the prerequisites of the RFP or who has previously failed to perform properly or complete on time contracts of a similar nature, and to reject the proposal of a respondent who is not in the sole opinion of BWB, able to perform the contract to the sole satisfaction of BWB.

BWB may, upon its discretion, establish a competitive range of qualified proposals for award consideration. BWB will not conduct discussions or negotiations with respondents not within the competitive range and those respondents will not be considered for award.

BWB reserves the right to award the contract in accordance with its best interest and will not be required to accept the lowest priced proposal.

Summary of Key Dates

Request for Proposal posted	Monday, November 21, 2022
Deadline for questions from respondents	Monday, December 5, 2022
Q&A sent to all RFP respondents	Friday, December 9, 2022
Proposal submission deadline	Friday, December 16, 2022
Finalists informed	Wednesday, January 4, 2023
Finalist interviews via Zoom	week of January 9 – 13, 2023
Consultant selected	Friday, January 20, 2023
Work to begin	early 2023, no later than March 1, 2023
Draft strategic plan produced	no later than October 1, 2023
Final strategic plan, including communication plan	no later than December 1, 2023

