



## Request for Proposals

*The Columbia Slough Watershed Council is seeking a qualified consultant to provide process design, facilitation, and technical support for development of an equity-centered, five-year organizational strategic plan, as well as tailored training around EDI concepts for staff and board members.*

**Letter of Intent:** Please send a brief letter of intent to submit a proposal, not to exceed one paragraph, to Cathy Kellon, Executive Director, at [cathy.kellon@columbiaslough.org](mailto:cathy.kellon@columbiaslough.org) by **5:00 PM PDT, February 5, 2021.**

**Proposal:** Please send your full proposal, not to exceed six pages, to Cathy Kellon, Executive Director, at [cathy.kellon@columbiaslough.org](mailto:cathy.kellon@columbiaslough.org) by **5:00 PM PDT, February 26, 2021.**

### 1. Announcement

The Columbia Slough Watershed Council is seeking proposals from qualified individuals or teams to support the development of a five-year organizational strategic plan that articulates and aligns our organization's mission, vision, values, strategies, and desired outcomes through an equity lens and a racial equity toolkit to further operationalize equity (see Section 5.3 for toolkit description). The Council also seeks a qualified trainer (which can be the same or a different service provider) to lead staff and board in an EDI training tailored to the organization's needs such that it will further strategic planning goals. The ideal candidate will have a proven track record of process design that incorporates an understanding of equity and inclusion, specifically within the environmental conservation sector; navigating conversations related to environmental conservation and restoration, equity, climate change, and environmental justice; including public voices and input; and experience working with non-profit organizations. Additionally, the EDI trainer will have demonstrated success in helping non-profit organizations develop tools to operationalize equity at the organization and program levels. The ideal candidate will offer professional services including process design and coordination, facilitation, and equity, diversity and inclusion training.

### 2. Background

The Columbia Slough Watershed Council is a 501 (c)3 non-profit organization with a mission to protect and enhance the Columbia Slough and its watershed through community engagement, education and enhancement. We have a stakeholder-representative board of directors, including neighbors, businesses, environmental advocates, and government agencies, and a small staff of four program directors and an executive director. We work to protect and enhance the 60 miles of waterways, wetlands and slow-moving channels in North and Northeast Portland, Gresham, and Fairview known as the Columbia Slough and its watershed. We conduct restoration of public and private lands near the Slough, co-host and lead educational events and workshops large and small, canoeing and kayaking events and nature festivals, culturally-specific events, and manage a robust youth education program. The Council provides numerous low to no-cost opportunities to play in, learn about, enhance, and enjoy the watershed.



## ***Looking Back***

Historically, the Slough watershed had dozens of small streams and springs flowing from the south into a series of side channels, wetlands, and marshes in the floodplain of the mainstem Columbia River. For millennia, Chinook tribes used the area to hunt and fish, and traveled between the Willamette and Columbia rivers via the Slough. The area includes traditional village sites of the Multnomah, Kathlamet, Clackamas, Chinook, Tualatin Kalapuya, Molalla, and many other Tribes. During the early 19th century, non-native explorers visited the area, leading the way for European settlers to forcibly remove Native people and build farms and cities. Beginning in 1918, levees were constructed to control seasonal flooding for the benefit of agriculture, and later residential and industrial development. The construction of the levee system transformed the Columbia Slough into the channelized and highly managed system it is today. In 1948, a railroad berm breached on the west end of the managed system, flooding and destroying the city of Vanport within hours. 18,500 residents were displaced, roughly 6,300 of whom were Black, and an unknown number of people lost their lives. The Vanport flood continues to influence demographic patterns and racial relations in the watershed.

150 years of industrial development have left a legacy of environmental problems across the watershed. The Columbia Slough Watershed Council began during the early 1990s in response to pollution, rampant development, and loss of open space. By 1994, community members had formed a citizen-led, basin-wide coordinating council for the Columbia Slough watershed. Thanks to stakeholder efforts, positive attention was drawn to what had been an otherwise overlooked part of the Portland metro area. In 2002, the Council was incorporated as a 501(c)(3) nonprofit organization. Since then, we have been working to improve the health of the watershed and engage with the people that call it home.

## ***Looking Forward***

The Council established its first [Racial Equity Vision Statement](#) and its [Equity Action Plan \(EAP\)](#) in 2015, which have since been revised (see provisional vision statement [here](#)). The EAP and Racial Equity Vision are the current guiding documents that represent the Council's equity commitments. The Council also has a Justice, Diversity, Equity and Inclusion (JEDI) Committee composed of staff, board, agency representatives, and community members who meet quarterly and advise the organization's equity work. Many of our organization's ongoing projects and programs seek to meet the EAP's equity goals.

During March-October 2021, the Council will embark on a process to create a five-year strategic plan and a toolkit for operationalizing racial equity within our organization. The process design should include a plan for listening to voices of diverse community members regarding their interests and priorities for watershed health and should incorporate the existing Equity Action Plan into an overall organizational strategic plan. Additionally, EDI training for staff and board members will take place during this period in order to support the development and/or implementation of the strategic plan. See the project timeline in Section 6 of this document.

### **3. Project Purpose**

The Columbia Slough Watershed Council seeks to develop an equity-centered, five-year organizational strategic plan and a racial equity toolkit for operationalizing equity in day-to-day decision making. The



process will take place with staff, board members and equity partners, and will also include voices from diverse communities within our watershed. The process will accomplish the following objectives:

- Develop shared understandings about the watershed context; organizational history, including strengths and shortcomings; and why organizational equity vision and goals are important.
- Include voices and perspectives from diverse community members and partner organizations about their interests and priorities for watershed health, preferred ways of working together, and organizational/community needs.
- Affirm our mission; clarify our “why” or purpose and our theory of change.
- Evaluate our organization’s resources, capabilities, and competencies.
- Assess how systemic issues like climate impact vulnerabilities and racial inequities intersect with our mission and affect our ability to realize our vision.
- Assess outside opportunities and risks.
- Working from the existing Equity Action Plan, set equity-centered goals, objectives, strategies, and activities across multiple time-horizons.
- Map out guidance for internalizing equity considerations into routine decision-making that will allow Council staff to prioritize activities that align with organizational goals and the needs and interests of the diverse communities in our watershed.

#### 4. Budget

The total cost of contract activities must not exceed **\$10,500**, including support for all project elements listed in Section 5. Consultants may submit proposals covering less than the full scope of work in the event that this budget does not cover all necessary costs. We will also consider hiring multiple service providers to support different project elements.

Proposals are encouraged to identify areas where the consultant would prioritize additional work if additional funds became available. Proposals are also encouraged to identify any other additional funds that are or could become available and applied toward this project (e.g. complimentary grant funding).

#### 5. Scope of Work

The Council seeks a consultant or consultant team that can support this project by fulfilling the following project elements:

1. Draft and finalize [process design](#) with the core project team, composed of staff and board members, and advising the core team on strategy throughout.
2. Lead process [facilitation](#), including: scheduling; logistics; meeting facilitation; preparation of meeting agendas, materials, and notes; and meeting follow-up.
3. Lead an EDI [training](#) with staff and board that is tailored to the organization’s needs.
4. Lead development of [products](#), including a 5-year strategic plan and racial equity toolkit.

The Council will accept proposals that address one or more of these project elements. Preference will be given to a single contracting entity or team that can address all the project elements.



## ***5.1 Process Design***

Consultant will develop a draft and final Process Design which can fulfill the project elements listed in Section 5 and deliver the products described in Section 5.3. The Process Design should document a set of goals, objectives, assumptions, timelines, products, and roles. It will serve as the shared work plan for the consultant, the Council, and core project team through the remainder of the project.

The ideal proposal will demonstrate the consultant's ability to design an organizational process that will a) align with the available time and resources while furthering the Council's long-term objectives; b) make efficient use of participants' time, including stakeholders, community members, and committees; and c) center equity.

## ***5.2 Lead Process Facilitation***

Consultant will coordinate and facilitate the strategic planning process, in coordination with the Council and the core project team (staff and board members). Expected responsibilities will include:

- Development and distribution of written agenda at least one week prior to each meeting;
- Coordination of meeting logistics, including meeting time, location, AV, and other hosting duties. Council facilities are available to host meetings (meetings will be conducted via Zoom as needed);
- Meeting facilitation;
- Development and distribution of meeting notes; and
- Tracking action items.

The consultant is expected to create an atmosphere of respect and communicate effectively with diverse types of stakeholders and personalities. The facilitator will maintain timely communications with the Council and the core project team through email and ensure a written record of discussion and any decisions made during meetings. Meeting notes will be circulated to participants. The Council will be responsible for retaining the meeting notes and other records.

## ***5.3 Lead Equity Training***

Consultant will advise on the type of training that would most benefit staff and board at this stage in the organization's work and either lead the training directly or supervise a different service provider.

## ***5.4 Product Development***

The consultant is expected to lead the development of the products described below. The sequencing of these products will be discussed and finalized during Process Design. Additional products may be proposed if the consultant anticipates that they will be necessary to support the process.



- A. Draft and final process design
- B. Five-year organizational strategic plan - A five-year strategic plan that articulates our values and vision and sets specific goals, objectives, and strategies to achieve our mission while advancing racial equity. The resulting long-term plan will build coherence across our programs and operations (subsequent annual work plans will be tiered to it) and serve as a “north star,” helping the Council to be more impactful and effectively navigate change
- C. Community needs assessment - This process has two key components: (1) summarizing Council strengths and impact and (2) characterizing watershed and community needs. This process will take advantage of readily available data on community demographics and environmental and public health indicators, and compare these to the demographic data we have collected from participants and volunteers at our events from the past several years; summarize information on active and past partnerships, roles, contacts, and programming; gather perspectives of diverse community members and partner organizations to learn what their interests and priorities are for watershed health (green spaces, water quality, recreation, outdoor education, and more); draw conclusions from these data to make recommendations for the Council’s equity work. The process should utilize pre-existing data sources where ever possible and efficiently gather meaningful community input within the limitations presented by time and funding constraints. The process should also seek to include community voices in a manner that nurtures sustained engagement with community members and partners in line with our equity goals.
- D. A racial equity toolkit - While a strategic plan provides guideposts, real life is highly uncertain, and circumstances require organizations and individuals to constantly reflect and adapt in pursuit of their goals. The toolkit will provide guidance on: how to incorporate equity into conventional deliberations; what questions we should answer about proposed projects, policies, or practices such as who/what groups will benefit and who/what groups will be negatively affected; how the impacts may advance or undermine our goals/mission; how to weigh the various goals of the organization at each scale of decision-making, particularly where racial equity goals seem to conflict with environmental goals; and, given the above, what changes need to be made to achieve our equity goals while fulfilling our mission. It will also include suggestions for how to measure and report on the progress, impact, and outcomes of any given project, practice, or decision.

Consultant is expected to develop all products in a collaborative manner, seeking feedback from stakeholders, who will be engaged through a strategic planning committee, and consensus amongst the core project team. The core project team should be engaged to some extent in all products. Stakeholders should be engaged in feedback on products B-D. The ideal proposal would specify how feedback and revision cycles would be incorporated.

## 6. Project Timeline

The timeline below is preliminary, to be refined through process design.



Description	Start Date	End Date
Hire Consultant	February 2021	March 2021
Finalize Process Design	March 2021	May 2021
Conduct Planning Process, EDI Training	April 2021	August 2021
All products complete	September 2021	October 2021

## 7. Procurement Timeline

The procurement timeline is as follows:

- Bids solicited via RFP: January 2021
- Letter of Intent Due: 5:00 PM PDT, February 5, 2021
- Deadline for Proposals: 5:00 PM PDT, February 26, 2021
- Contract awarded: March 2021

## 8. Proposals

Please submit proposals of no more than 6 pages. Proposals should be submitted as a PDF or MS Word file via email to Cathy Kellon, Executive Director, at [cathy.kellon@columbiaslough.org](mailto:cathy.kellon@columbiaslough.org) with the subject line “Strategic planning proposal.” The page limit includes information described in subsections A-E below and excludes budget and fee schedule, described in subsection F. Proposals should include the following information:

- A. Contact Information - Name of the primary contact, title, phone number, physical address, and email address.
- B. Project Proposal
  - a. Why your firm is interested in the project;
  - b. Which project elements your proposal covers. The Council will accept proposals that address one or more of the project elements described in Section 5. Preference will be given to a single contracting entity or team that can address all the project elements;
  - c. Summary of your approach;
  - d. Description of the process you will use to meet project objectives and deliverables;
  - e. Summary of work that could be included if additional funds are secured.
- C. Relevant Work Experience
  - a. Describe briefly the experience and qualifications of the individuals expected to work on the contract.
  - b. Provide a clear and concise summary of up to 3 projects (or up to 3 projects per firm, if the proposal is from a team) demonstrating relevant work experience. Summaries should include the name of the respective projects, year(s) of operation, location, a brief project description focused on the applicant’s role, a description of the project



- c. outcomes, and a reference we may contact. Applicants may include links to additional information related to relevant work experience and specific projects as they see fit.
  - d. Where multiple firms are involved, include a summary of how you will work together and any history of working together.
- D. Commitment to EDI
- a. Describe how you integrate EDI into your business model and provide two brief examples.
  - b. Provide the types of ingredients/key elements you recommend to help organizations operationalize their EDI goals.
- E. Experience in the environmental sector -- Briefly describe your experience assisting environmental conservation non-profits or groups realize their environmental and equity goals.
- F. Estimated budget and schedule of fees -- Include rates for all participating staff and any subcontractors you may bring on to help. Include budgets showing costs by line item and by task. Budget information is not included in the page limit.

## 9. Contractor Qualifications and Evaluation

Qualifications and evaluation will be adjusted to reflect only those project elements covered in the proposal. Project elements are described in Section 5. Preference will be given to a single contracting entity or team that can address all the project elements.

The following minimum qualifications are required for this project:

- At least 5 years of experience coordinating and facilitating EDI-focused strategic planning; Demonstrated experience in:
  - Process design for organizational planning and product development;
  - Facilitating multi-stakeholder collaboration;
  - Research and policy analysis;
  - Designing compelling communication products; and
  - Leading equity, diversity and inclusion training.
- Demonstrated understanding of histories, current issues, and discourses relevant to the environmental conservation sector and the intersection of environmental, environmental justice, and equity issues.

## 10. Additional Information

Please direct questions to Cathy Kellon via email at [cathy.kellon@columbiaslough.org](mailto:cathy.kellon@columbiaslough.org).