Request for Proposals:
Professional Conservation Planning and Facilitation Services

Contact Person
Sam Calhoun, Conservation Programs Manager
sam.calhoun@columbialand.org

Budget
Not to exceed $45,000

Timeline
September 2024 – September 2025

Purpose
The Columbia Land Conservancy (CLC) seeks the services of a planning consultant with strong facilitation and writing skills. The consultant will design and facilitate a collaborative strategic conservation planning process involving representatives of multiple local communities and work with CLC staff to develop and produce a Countywide Conservation Plan (“Plan”) for Columbia County, New York. The plan will identify, inventory, and analyze both ecological as well as cultural resources present in Columbia County, with public input, to determine the lands and spaces most critical to protect through conservation actions.

Background
CLC’s new strategic plan includes a commitment to develop a Countywide Conservation Plan (Open Space Plan) that will outline a vision and priorities for CLC’s and other local actors (municipalities, citizen groups, conservation organizations, etc.) future land protection efforts in Columbia County. CLC is committed to ensuring that this process includes the participation of our community members to gain insight into the places and spaces that are viewed as most important to our constituents and broader community.

This resulting plan will: 1) update an inventory of existing ecological and cultural data that catalogue important natural resources and cultural values in the county; 2) analyze and index that data by creating a ranking system to determine which properties in the county contain significant values and should be prioritized for conservation; and 3) outline a vision and identify action steps that CLC and other local actors can take to protect our most vulnerable and valued resources.
The Planning Process

CLC will engage a broad coalition of community partners to create this plan, which will identify priorities for proactive pursuit of conservation actions and projects. The plan will also incorporate community feedback around these shared resources and values. Other important land use considerations may also be addressed in this plan, for example the siting of renewable energy as well as the siting of affordable housing.

CLC will be responsible for recruiting participants for the planning effort and will contract additional services of a GIS consultant to assist with the spatial analysis of natural resources including inventorying, indexing, and prioritizing those resources.

The facilitation consultant will design and lead a collaborative stakeholder engagement process for developing the Plan and, in close consultation and collaboration with CLC staff, create the plan. The stakeholder group may include representatives of municipalities, community groups, recreation user groups, other conservation organizations, and residents.

We envision the plan will include these steps:

- Assist the group in developing a statement of purpose for the plan and objectives for conservation in the County.
- Guide stakeholders to select a process for the approval of elements of the plan and the final plan.
- Facilitate the stakeholder group discussion while they review, evaluate, and contribute their local knowledge around the natural resources analysis and prioritization.
- Synthesize the discussion and bring consensus back to the group for verification.
- Design opportunities for public feedback/input and data collection in the form of 3-4 in-person events (workshops, meetings, etc.) as well as the design of an online survey to be distributed through CLC’s website.
- Collaborate with CLC, a GIS consultant, and community partners. They will share the plan with the working group, solicit feedback, and incorporate revisions. To inform the drafting of the plan, the consultant will also work with CLC and the working group to identify key audiences to inform the content of the Plan. The Plan will include an executive summary and major findings in an easy to digest format with appropriate graphics. The Plan will highlight each municipality, identifying important resources and results present in their respective community. The plan should also speak to individual landowners, and include actions and key findings related to individual land management. The consultant may choose to subcontract portions of this work to other contractors if necessary.
- Create a plan that has clear implementation steps to ensure that conservation outcomes are realized.
Deliverables:

1. Stakeholder engagement strategy.
2. Quarterly progress reports.
3. 6 meetings via virtual platforms or in person, with CLC staff, schedule to be determined.
4. 3-4 Public feedback meetings to solicit community input regarding ecological and cultural values.
5. Administer meeting-related correspondence to both the stakeholder group and the broader community including meeting reminders and sharing information ahead of time. The consultant will provide the content for those communications.
6. Summaries of stakeholder opinions, concerns, opportunities and pressing issues generated through the stakeholder engagement process generated at each meeting.
7. Summaries of community feedback and input regarding natural and cultural resources generated through public feedback opportunities (meetings and an online survey)
8. Draft plan and final plan with the expectation of two rounds of revisions for the draft Plan and one round of revision for the final Plan.

General expectations for the style and content of the stakeholder facilitation and community feedback meetings:

- Adhere to the project purpose and timeline.
- Ensure that meetings run smoothly, and the process is fair, respectful, and transparent.
- Develop materials and activities as needed to support the process.
- Use techniques that encourage collaboration and mutual understanding and that recognize different communication styles.
- Coordinate and collaborate with the designated staff at Columbia Land Conservancy.
- Establish trust and basic standards for participant engagement in the process, such as mutual respect, and openness to all points of view.
- Maintain a record of materials and feedback shared during the planning process to create a record of how decisions were made regarding the results of the Plan in an effort to create transparency.
- Ensure progress toward the project goals in a collaborative way.
- Approach the project as a learning opportunity for everyone involved.

Consultant Selection Process (with dates)

- RFP issued: June 7th.
- Questions due by June 24th.
- Questions and answers posted by CLC on June 28th.
- Proposals due: July 12th.
Interviews with selected candidates will be scheduled by July 30\textsuperscript{th}.
Selection of preferred candidate(s) will be completed by August 23\textsuperscript{rd}.
Negotiation of contract and final scope of work by September 6\textsuperscript{th}.
Work to be completed between September 9\textsuperscript{th} and September 30\textsuperscript{th} 2025.

Submittal

Cover letter including expression of interest, name, location, and contact information.

Proposal should include:

I. Approach. Describe the approach to the project, including staffing and coordination with CLC, with enough detail to distinguish the unique strengths of the consultant for this effort.

II. Project timeline, based on the approach and identifying completion dates for deliverables. The project must be completed by September 30\textsuperscript{th} 2025. Include any insights on the potential challenges or obstacles that may be reasonably anticipated and any suggestions as to approaches to keep the project on track.

III. Statement of qualifications, including names of staff for the project, their professional experience and educational background and any other relevant qualifications.

IV. Describe relevant experience with community-based conservation planning projects, including client names and at least two references.

V. Submission of any examples of similar work that has been completed, any other relevant work product or any material you deem relevant to the proposal and directly related to the services sought in this RFP.

VI. Detailed cost estimate, include expenses, travel, materials, and other expenses. Submit via e-mail as a single PDF to sam.calhoun@columbialand.org with a subject line ‘Strategic Conservation Plan’. File sharing by providing a link is acceptable if the file size is too large to attach to an e-mail. Please send a cover letter with link included to the email address provided. Proposals must be received by 5:00 pm on July 12th, 2024 to be considered.

Questions?

Questions regarding this RPF may be submitted via e-mail to sam.calhoun@columbialand.org on or before June 24\textsuperscript{th} 2024. Questions will be compiled and will be posted on CLC’s website, with answers, on June 28\textsuperscript{th}, 2024. No phone calls.

Evaluation criteria

The firm must be available to execute the project during the period described (September 2024 and September 2025). CLC may request further information including a list of project commitments during that time frame and end dates. Respondents must be a NYS – certified minority or woman-owned business enterprise (MWBE) or be in process of
becoming a certified MWBE. CLC’s NYS grant funding established a goal of at least 30% participation by MWBEs. Consultant should identify whether they intend to employ a NYS-certified MWBE for a significant role in the project.

Proposals will be scored by CLC’s selection committee on a scale of 1-4 (1 being the lowest, 4 being the highest) on the following criteria:

- Project Approach
- Qualifications / Experience of Project Team / Experience on Similar Projects
- Clarity and responsiveness to RFP
- References / Past Performance

Maximum Points - 16

**Statement of Rights**

The Columbia Land Conservancy reserves the right, and may at its sole discretion, exercise the following rights and options with respect to this Request for Proposals:

1. to reject any and all proposals;
2. to issue additional solicitations for proposals and/or amendments to this Request for proposals;
3. to waive any irregularities in proposals received after notification to proposers affected;
4. to select any proposal as the basis for negotiations of a contract, and to negotiate with proposers for amendments or other modifications to their proposals;
5. to conduct investigations with respect to the qualifications of each proposer;
6. to exercise at its discretion and apply its judgment with respect to any aspect of this Request for Proposals, the evaluation of proposals, and the negotiation and award of any contract;
7. to enter into an agreement for only portions (or not to enter into an agreement for any) of the services contemplated by the proposals;
8. to select the proposal that best satisfies the interests of CLC and not necessarily on the basis of price or any other single factor.

**Cost of Proposal Preparation**

No reimbursement will be made for any costs incurred for preparation of proposals and/or interviews.

**Contract**

If CLC selects a proposal, a formal written contract shall be entered into between CLC and the successful proposer. The proposal or any part thereof submitted by the successful proposer may be attached or become a part of the contract. The contract shall not become binding until signed by both parties.
Contractors are required to obtain a certificate of insurance for $1 million general liability listing CLC and any sub-contractors as additionally-insured parties and provide proof of worker’s compensation insurance coverage.