



May 18, 2021

REQUEST FOR PROPOSAL for a facilitator and survey consultant to conduct a capacity building assessment of the Chesapeake Bay watershed.

Introduction/Background:

Since 2010, the Choose Clean Water Coalition (the Coalition) has harnessed the collective power of more than 250 groups to advocate for clean rivers and streams in all communities in the Chesapeake Bay region. By coordinating policy, messaging, action, and accountability, the Coalition is able to speak louder with one voice toward our collective goal - clean water.

The Alliance for the Chesapeake Bay (the Alliance) brings together communities, companies, and conservationists to improve our lands and waters. Our vision is clean streams and rivers flowing through resilient landscapes, cared for by the people who live, work, and play in the Chesapeake Bay watershed. [We value collaboration, inclusivity, and driving with results for collective, equitable, and measurable impact.](#)

The Coalition and the Alliance are both organizational and technical capacity builders in the Chesapeake Bay community. We recognize that critical gaps in capacity are one of the biggest barriers that keep Chesapeake Bay Non-Governmental Organizations (NGOs) from being as effective and efficient as possible when implementing on-the-ground projects. These capacities include, but are not limited to:

- Technical capacity to implement agriculture best management practices, planning, and management;
- Technical capacity to implement stormwater best management practices, planning, and management;
- Adaptive capacity to monitor, assess, respond to, and stimulate internal and external changes;
- Leadership capacity to inspire, prioritize, make decisions, provide direction, and innovate;
- Management capacity to ensure the effective and efficient use of organizational resources; and
- Technical capacity to implement all of the key organizational functions and deliver programs and services.

In the summer of 2019, a series of discussions between the Coalition, the Alliance, National Fish and Wildlife Foundation, and the Chesapeake Bay Trust led to a joint determination that the first step to addressing these capacity needs is to survey and assess the Chesapeake Bay NGO community to answer the following questions: What are the capacities not being filled? What are the subject matter and/or capacity expertise missing? How can we support existing capacity builders to expand and/or adjust their services?

In fall 2020, the National Wildlife Federation received a grant from the National Fish and Wildlife Foundation, which enables the Coalition and the Alliance to develop and distribute a web-based survey to Chesapeake Bay NGOs to assess their current capacities and needs. The grant also supports the facilitation of a series of six roundtables with our survey audience to refine and explore in depth the trends and key interest topics identified in the survey results. The outcomes of these efforts will inform a capacity-building framework for the Chesapeake Bay watershed, drafted by the Coalition and the Alliance.



Scope of Work: The Coalition and the Alliance seek the services of a consultant to successfully complete two activities: (1) develop and implement a web-based survey to establish capacity baseline among NGOs within the Chesapeake Bay watershed to implement on-the-ground restoration projects; and (2) facilitate six virtual roundtable discussions with a subset of surveyed NGOs. Applicants must be capable of delivering on both activities. The Coalition and Alliance will work closely with the consultant to provide guidance, feedback, and input during the development of the survey and facilitation of the roundtables.

The anticipated activities, tasks, and deliverables are listed below. Based on proposals received and subsequent review, the tasks may be further refined. All final tasks will be included in the contract with the successful consultant.

Activity 1: Develop and implement a web-based survey to establish capacity baseline among NGOs within the Chesapeake Bay watershed to implement on-the-ground restoration projects.

Task 1: Finalize Survey Tool and Methodology

- Identify survey goals, objectives, and audience size and refine sample questionnaires based on existing literature review and in consultation with the Coalition and the Alliance.
- Develop the sampling frame for the study consisting of email addresses of representatives from the upwards of 400 NGOs in the Coalition and the Alliance's joint membership/audience.
- Support the Coalition and the Alliance in securing commitments of trusted sources to distribute the survey and implement strategies to compel members to complete the survey.

Task 1 Deliverables:

- Initial kickoff meeting/conference call with the Coalition and the Alliance to discuss project objectives.
- Develop the questionnaire.
- Documentation of sample frame for the study consisting of names and e-mail addresses for the individuals to be surveyed.

Task 2: Conduct the Survey

- Program and test the survey online. The consultant should identify any associated survey platform and is responsible for associated costs for subscription to the platform.
- Support trusted sources with inviting and reminding participants to take the survey.

Task 2 Deliverable: Deliver a presentation on the results of the test and proposed revisions (if any) to survey or methodology.

Task 3: Prepare the Report

- Analyze the results that would identify current capacity needs of our partners.
- Prepare a slide deck report summarizing findings.
- Present findings for review by the Coalition and the Alliance.

Task 3 Deliverable: Prepare a final slide deck report summarizing survey findings.

Activity 2: Facilitate six virtual roundtable discussions with a subset of surveyed NGO's.



Task 1: Lead Roundtable Planning

- Participate in two to three planning calls with the Coalition and the Alliance as well as provide electronic feedback in order to develop the objectives and agendas for the roundtables, identify the subset audiences for each roundtable, and select dates for roundtables. *Note - some roundtable dates may align with existing key audience engagement events, such as the Chesapeake Watershed Forum (November 4-5, 2021).*
- Support the Coalition and the Alliance in securing commitments of trusted sources in recruiting participation in roundtables.

Task 1 Deliverables:

- Determination date, access, and other pertinent details of each roundtable
- Facilitator agendas for each roundtable.

Task 2: Conduct Virtual Roundtables

- Convene six virtual roundtable discussions, using the Coalition or Alliance's meeting platforms, of Chesapeake Bay NGOs to gather additional insights on their capacity needs. An estimated 10 to 20 individuals are expected to attend each roundtable.
 - o Coalition and Alliance staff will coordinate event logistics including video conferencing technical assistance and breakout room implementation. They will also document the roundtables through note taking, chat box copying, and event recording. Finally, they may serve as additional facilitator support to the consultant.

Task 2 Deliverables: Six completed roundtables.

Task 3: Complete process

- Compile a slide deck summarizing major findings from the roundtable discussions.
- Present findings for review by the Coalition and Alliance staff.

Task 3 Deliverable: Prepare a final slide deck report summarizing roundtable findings.

Timeframe & Budget: The proposed scope of work should be completed within a 10-month period, from approximately 6/14/21 through 4/30/22. This timeframe is subject to change based on the Choose Clean Water Coalition's funding sources and the consultant-interview process. The budget of this scope of work is not to exceed **\$40,000**.

Qualifications, Proposal Format, & Submission Instructions: Applicants are encouraged to follow the guidelines of proposal and will be considered according to qualifying attributes and submissions.

Successful proposals will demonstrate subject matter expertise and experience in:

- Knowledge and experience in research methods and surveying.
- Knowledge and experience in facilitation.
- Familiarity with the players and dynamics of the Chesapeake Bay environmental movement.

Interested parties should submit the following for project proposals:



1. Cover letter
2. Contact information
3. Organization Background and short biographies for all participating team members
4. Outline of proposed timeline including planning, implementation, and deliverables (reflective of the Scope of Work identified within this RFP) with key milestones/targets and dates.
5. Detailed budget to coincide with item #4, including a cost associated with each activity and task.
6. Examples of past survey and roundtable facilitation. If applicable, please indicate if any examples were conducted virtually.
7. Include client contact information to serve as scope of work relevant references for the survey and roundtable facilitation examples.

Consultants must be based in the United States.

Deadline for Submissions: June 7

Submissions must be sent to: Lauren Sauder at lsauder@allianceforthebay.org and Drew Robinson at RobinsonAQ@nwf.org

The Coalition and the Alliance encourage small and minority-owned firms to apply. All qualified applicants will receive consideration without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

No telephone inquiries, please.