

**REQUEST FOR PROPOSAL (RFP)**

**LEWIS CREEK ASSOCIATION  
STRATEGIC PLAN**

**LEWIS CREEK ASSOCIATION  
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(802) 488-5203**

**ISSUED.....NOVEMBER 3, 2023  
DEADLINE FOR QUESTIONS.....5 PM EST, NOVEMBER 17, 2023  
DEADLINE FOR SUBMISSIONS.....5 PM EST, DECEMBER 1, 2023**

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## 1. Summary and Background

Through a grant from the Lake Champlain Basin Program, Lewis Creek Association is seeking a consultant to prepare a strategic plan.

Deliverables: As detailed below

Project Duration: This project is expected to commence in January 2024 and will be completed no later than June 30, 2024.

The mission of Lewis Creek Association is to protect, maintain and restore ecological health while promoting social values that support sustainable community development in the Lewis Creek, LaPlatte River, and direct-to-lake watersheds, and throughout Vermont. Through education and action, LCA works to:

- Restore water quality, stream stability, and native wildlife habitat
- Protect and restore important and diverse natural areas
- Conserve productive and scenic lands that contribute to rural character and economy
- Support growth compatible with important natural systems and working landscapes
- Strengthen and support local conservation initiatives and opportunities
- Model active participation and respect for differences

For over 30 years LCA has operated primarily as a volunteer organization working with local and state agencies to implement educational and on the ground projects, practices and programs to address pollution in the Lake Champlain watershed. With a hard-working volunteer board and a part-time paid staff member, LCA facilitates educational, planning, and field work programs involving dozens of volunteers.

LCA's programs (Conservation & Restoration, Data Collection & Planning, and Education & Outreach) focus on water quality, river restoration, stormwater practices, and wildlife habitat and its volunteer water quality monitoring and invasive plant control programs have engaged watershed community members from the headwaters in Starksboro to the lakeshore residents in Ferrisburgh, Charlotte, and Shelburne. LCA has initiated and participated in numerous events that bring community members together to share local knowledge, technical expertise, practical skills and serve to build trust and support to implement needed changes to our individual actions and collective responsibility to assure an improvement in the health of Lake Champlain.

With the sudden death in 2021 of LCA's co-founder and Executive Director, Marty Illick, the LCA board continues to maintain its primary programs and services and recognizes the vital need for the role of an executive director. The ED's active and continued involvement with individuals, town officials, and community organizations is critical to LCA's success in promoting and implementing the protection of water quality and ecological services in the LaPlatte and Lewis Creek watersheds. As a part-time paid Executive Director for over 25 years, Marty had transitioned to fulfilling this role as a volunteer and LCA had hired a part-time program manager.

Before her death, LCA was beginning the process of determining its financial capacity to support the ED position and to meet the mission of the organization. The board recognizes that there is a need for a more sophisticated strategic plan with a greater emphasis on financial sustainability. This RFP will help the board better understand and plan for the long-term financial capacity of the organization.

A strategic plan will enable LCA to more effectively implement its programs and continue to meet the needs of the growing population. As new residents move into these watershed towns and new science and techniques evolve, there is the continued need to introduce these ideas through education and outreach to residents (especially riparian landowners) and to town officials on how we can collectively be working for the protection of our local and regional waterways.

The purpose of this Request for Proposal (RFP) is to solicit proposals from consultants through an evaluation process based on criteria listed herein. The Lewis Creek Association will select the candidate who best represents its goals for developing a strategic plan and working with the board and community to further its goals.

## 2. Proposal Guidelines

This Request for Proposal represents the requirements for an open and competitive process. Any questions regarding this RFP must be submitted via email to Kate Kelly, LCA Program Manager, at [lewiscreekorg@gmail.com](mailto:lewiscreekorg@gmail.com) by 5 PM EST on November 17, 2023. Replies to questions will be submitted to those who posed the question(s) and also supplied to other vendors from whom the LCA is also soliciting bids or proposals.

If the organization submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

In order to be considered responsive to the RFP, each proposal must conform to the following requirements:

- Submit one digital PDF of the proposal, either via email ([lewiscreekorg@gmail.com](mailto:lewiscreekorg@gmail.com)) or via a Dropbox link ([lewiscreekorg@gmail.com](mailto:lewiscreekorg@gmail.com)).
- Clearly indicate the following on the submissions: Project name (LCA Strategic Plan), the name and address of the prime consultant along with the name and telephone number of the appropriate contact person.

**Proposals will be accepted until 5 PM EST December 1, 2023.** Any proposals received after this date and time will not be accepted.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP, and once project funding has been received.

### 3. Project Purpose and Description

**The purpose of this project is as follows:**

Lake Champlain Basin Program (LCBP) grant has provided funding for LCA to review financial status, complete community outreach, and develop a strategic plan.

**Project Description:**

This project will result in a strategic plan, but will require several tasks along the way. The selected consultant shall compile and analyze existing financial and programmatic information, presenting information on LCA's existing financial status and relationship to existing programs to the board. The consultant shall also provide an educational workshop for the board on organizational financial planning. The consultant shall then conduct outreach to homeowners and community groups to better understand their needs and what they'd like to see from LCA, likely via a survey and at least one public program. The consultant will hold meetings with the board, and develop a strategic plan using the gathered information and feedback from the board. The consultant shall review a press release drafted by LCA, and consult on the final report written by LCA as needed.

### 4. Project Scope

The scope of this project includes the following minimum items, with deliverables underlined. Consultant input to identify the precise components of these deliverables is a welcome part of the process.

#### 1. Project Initiation

- 1.1 Plan for and attend an initial meeting with project team

#### 2. Evaluate Programs

- 2.1 Collect and analyze existing financial and programmatic data
- 2.2 Presentation to board regarding existing financial status & relationship to existing programs
- 2.3 Educational workshop for the board on organizational financial planning

#### 3. Strategic Plan

- 3.1 Develop survey
- 3.2 Organize community outreach
- 3.3 Present results to the board
- 3.4 Develop strategic plan

#### 4. Project Completion

- 4.1 Review press release
- 4.2 Consult on final report as needed

All electronic files, supporting data, and documents generated by the retained consultant in the performance of this contract shall become the property of the LCA, and the LCBP/NEIWPC as grantor. The consultant may retain copies of the files and documents as well.

## 5. Request for Proposal and Project Timeline

### **Request for Proposal Timeline:**

All proposals in response to this RFP are due no later than 5 PM EST December 1, 2023.

Evaluation of proposals will be conducted before December 8, 2023. If additional information or discussions are needed with any bidders during this window, the bidder(s) will be notified.

The selection decision for the winning bidder will be made no later than December 15, 2023.

Upon notification, the contract negotiation with the winning bidder will begin immediately. Contract negotiations will be completed by December 22, 2023.

Notifications to bidders who were not selected will be completed by December 29, 2023.

### **Project Timeline:**

Initial kickoff meeting with project team is anticipated in January 2024. Program evaluation should be complete by March 2024. Strategic plan should be completed by May 2024. Final report and press release should be complete by end of June 2024. This schedule may be flexible if this timeline does not work for a consultant.

## 6. Bidder Qualifications

Bidders should provide the following items as part of their proposal for consideration:

- Qualifications - description of experience in financial & strategic planning
- Examples of 2 or more related projects you have completed
- Scope of Work – detailing the consultant’s proposed approach to the work tasks described in the RFP, and any recommended adjustments to the scope or individual tasks
- Proposed Schedule – include completion of work tasks and deliverables as well as any key meetings
- Resumes of key staff (not exceeding 2 pages for each person), a brief description of their role in the project, and a brief description of their work on related or similar projects
- References (please provide a minimum of two, including the name, email, and telephone number of the contact person).
- Required Cost Information: schedule of staff to be assigned to the project, their hourly rates, and estimated hours per person by task. Include overhead rates, equipment fees, mileage charges, printing fees, etc.

## 7. Proposal Evaluation Criteria

Lewis Creek Association will evaluate all proposals based on the following criteria by a selection committee comprised of staff/volunteers of LCA. To ensure consideration for this Request for Proposal, your proposal should be complete and include all the following criteria:

- Qualifications of the firm and the personnel to be assigned to the project (20 pts)
- Demonstration of overall project understanding, insights into project goals, insights into potential issues, and demonstrated understanding of the project deliverables (20 pts)
- Demonstrated ability to successfully implement financial & strategic plans, as well as produce quality written work (30 pts)
- Clarity of the proposal and creativity/thoughtfulness in addressing the scope of work (20 pts)
- Submission of a complete proposal with all elements required by the RFP (10 pts)

Once the proposal is discussed and ranked, the cost proposal will be reviewed for consistency with, and in light of, the evaluation of the proposal. LCA reserves the right to seek clarification of any proposal submitted and to select the proposal considered to best promote LCA's goals.

All proposals become the property of LCA upon submission. The cost of preparing, submitting and presenting a proposal is the sole expense of the consultant. LCA reserves the right to reject any and all proposals received as a result of this solicitation, to negotiate with any qualified source, to waive any formality and any technicalities or to cancel the RFP in part or in its entirety if it is in the best interest of LCA. This solicitation of proposals in no way obligates LCA to award a contract.

For further information on this RFP, please contact: Kate Kelly, LCA Program Manager, at [lewiscreekg@gmail.com](mailto:lewiscreekg@gmail.com), (802) 488-5203.