



RFP for Strategic Planning Consultant

June 6, 2024

INTRODUCTION

The Oyster Recovery Partnership (ORP) is requesting proposals from qualified strategic planning consultants to conduct a far-reaching and inclusive process to develop a Strategic Plan that will guide the organization's work over the period 2026-2030.

The selected consultant will be responsible for leading the ORP Board and Executive Director in the development of a Strategic Plan. ORP is soliciting proposals for these services in accordance with the terms, conditions, and instructions set forth in this Request for Proposal.

There is no expressed or implied obligation for ORP to reimburse responding firms for any expenses incurred in preparing proposals in response to the request or for attending any meetings or conferences related to preparing or presenting proposals.

BACKGROUND

Founded thirty years ago, the Oyster Recovery Partnership, a Maryland-based 501(c)(3) non-profit, is at the forefront of oyster recovery efforts in Maryland. Since its inception in 1994, ORP has planted more than 11.5 billion oysters on more than 3,000 acres of reefs in the Chesapeake Bay and its tributaries and recycled more than 320,000 bushels of shell, thanks to community, state, and federal partners' support. ORP promotes and manages projects that restore oyster reefs located in oyster sanctuaries and repletes shell and oysters to public fishing grounds. ORP also supports the sustainable harvest of Chesapeake Bay fish and shellfish, which enhances a thriving seafood industry, strengthens the regional economy, and preserves the rich culture of communities surrounding our waters. ORP's advocacy and actions are improving the health of our waterways and making it easier for oysters, crab, fish, and other local marine life to thrive.

ORP's administrative office is in Annapolis, MD. ORP maintains its restoration facility with staff at the Horn Point Oyster Hatchery in Cambridge, MD. ORP works with a diverse set of partners to implement its mission. Our partner list includes a long-standing relationship with the University of Maryland Center for Environmental Studies Horn Point Laboratory, Chesapeake Bay watermen, the Maryland seafood industry, restaurants, and other environmentally conscious organizations. ORP maintains its operations with a majority of funding from both state and federal agencies. A smaller portion of ORP's annual funding comes from private donations. The organization's annual revenue is approximately \$7 million per year. ORP is composed of 20 staff, including scientists, technicians, marketing experts, and a full suite of administrative and financial support personnel.

ORP's Board of Directors includes a maximum of 21 members and provides governance over the organization and helps to guide the overall mission. Board Members have diverse backgrounds, with experience in various environmental, corporate, and governmental organizations, and the seafood industry. Each year, the Board holds an annual meeting in February, and three quarterly meetings follow in May, August, and November. Most are held at the ORP office in Annapolis, but occasionally meetings are conducted at offsite locations.

In 2020, ORP implemented an organization-wide strategic plan with a five-year lifespan. As we approach the terminus of this plan, we wish to develop a new plan to guide our organization in the years ahead, building upon the work of ORP's first 30 years. As such, ORP is seeking proposals for consultant services to develop a strategic plan for 2026 through 2030. We expect

to begin this effort during September of 2024 and have a finished product for approval by the Board at its quarterly meeting in May 2025. We anticipate the effort will require between \$30,000-\$50,000.

ELIGIBILITY

Consultants should be experienced in working with organizations in the development of a long-term strategic plan. In addition, experience working with environmental nonprofit organizations is preferred. The intent of this Request for Proposals is to garner proposals from qualified strategic planning consultants to work in partnership with the Strategic Planning Committee, Board of Directors, staff, and community of stakeholders. The successful proposer will work directly with the Strategic Planning Committee and the Executive Director to ensure all activities in this project are completed.

ANTICIPATED SCOPE OF WORK

ORP has already established a Strategic Planning Committee composed of Board and staff members. We anticipate that the consultant will work directly with the committee to define and implement the strategic planning process. We envision the process will include:

- Regular meetings with ORP's Executive Director and the Chair of the Strategic Planning Committee, brief weekly email progress reports, and meetings with the full Strategic Planning Committee, as necessary
- Interviews of the entire ORP Board of Directors (19 members) and ORP Staff (15 staff)
- Outreach to stakeholders (approximately 25) including:
 - Organizational partners
 - Oyster harvesters
 - Aquaculture industry
 - Marine science community
 - Restaurant industry
- Reviews of relevant documents identified by the Strategic Planning Committee including our current Strategic Plan
- Gathering insight regarding critical issues and priorities for ORP including oyster restoration, support for sustainable fisheries, public outreach and education, and fundraising

We anticipate that project deliverables would include:

- Framework document outlining the selected consultant's process and direction to develop the organization's strategic plan
- Documentation of findings from the Board, staff, and external stakeholder meetings
- Draft Strategic Plan, provided to ORP's Strategic Planning Committee for feasibility review that includes goals and objectives for each of ORP's major focus areas, including:
 - Oyster restoration
 - Support for sustainable fisheries
 - Operations
 - Public outreach and education
 - Fundraising
 - Other areas, as appropriate
- Strategic Plan presentation to ORP Board of Directors at quarterly meeting in May 2025

PROPOSAL REQUIREMENTS

The following information is required for the proposal submission to be considered:

- Firm name, address, contact name, title, phone number, and email address
- Description of the background, experience, and capabilities of your firm as it relates to the Scope of Work outlined above

- The name and title of the primary consultant/project lead and any other key team members assigned to this project. For each individual, provide a summary of qualifications and experience
- Proposed Task Plan including an outlined approach and strategy to complete the requested Scope of Work, including timeframe for major tasks
- Cost estimate for the proposed Scope of Work, and any other project-related costs
- List of three references and examples of similar projects

SCHEDULE

Proposals must be received no later than 5:00 p.m. EDT on July 19, 2024. Proposals received later than the date and time specified may not be considered. ORP assumes no responsibility or liability for late delivery or receipt of responses. To be considered eligible for the project, the consultant who would be assigned to the project must be available in person or by phone/videoconference to respond to questions the week of August 26, 2024. The project will be awarded, and terms finalized thereafter, with work to begin in September 2024. Selection of a consultant under this Request for Proposal does not commit ORP to procuring any services pursuant to this Request for Proposal. ORP will negotiate contract terms upon selection.

Send Proposals and questions to Ward Slacum, Executive Director of Oyster Recovery Partnership, at <mailto:wslacum@oysterrecovery.org> by 5:00 p.m. EDT on July 19, 2024.