



## **REQUEST FOR PROPOSALS**

### **FOR PROFESSIONAL SERVICES FOR THE BUSINESS/OPERATION PLAN DEVELOPMENT**

The Prairie State Conservation Coalition, *An Illinois Association of Conservation Land Trusts* (PSCC) and 501(c)3 not for profit, requests proposals for the following:

#### **I. SCOPE OF SERVICES:**

Integration and alignment of the strategic plan (attached) with a business/operation plan that provides:

- a) an assessment of PSCC's assets including all of its programs, services and products and their impacts;
- b) a clear articulation of our desired impact;
- c) a roadmap for financial sustainability and growth;
- d) growth and revenue strategies for delivering on our desired impact while remaining financially stable;
- e) a deliverable that can be updated continuously as challenges and opportunities arise.

#### **Additionally the proposer will submit:**

- a) professional service qualifications for the individuals working on the project and an organization chart;
- b) a descriptive narrative approach to the work including providing all necessary facilitation process design and facilitation services and;
- c) proposal for the work, including hourly rates and travel for the PSCC Business Plan Development;
- d) a timeline for the tasks within the prescribed timeframe and;
- e) a list of additional services outside of this scope that may potentially include a marketing plan linked to the business plan, and a 'campaign council' effort to follow up on strategies.

Generally, the PSCC board will:

- Review proposals and select a consultant
- Assist with communications to the coalition members
- Design and lead conference calls and in-person meetings as needed
- Provide logistics support as needed

#### **II. UNDERSTANDING AND HISTORY OF THE PSCC:**

The Consultant will have an understanding of the PSCC's history, purpose, structure and focus. The chosen consultant will be contracting with the PSCC, and the consultant will be working with and taking direction from the board of the PSCC during the course of the contract. More information on the PSCC and its activities can be found at:

<http://www.prairiestateconservation.org/pssc/>



The Prairie State Conservation Coalition (PSCC) was founded in 2005 with the overarching goal to increase the amount of protected natural habitat and open space in the State of Illinois by convening a strong network of conservation land trusts that have ample capacity, resources, technical skills and public support. To achieve this goal, PSCC assists conservation land trusts in protecting land and water resources in Illinois by providing continuing education and training for conservation land trusts and advocating for strong statewide policies that benefit land conservation.

### III. PROJECT OBJECTIVE:

- 1) Create a business/operation development plan that provides a clear vision for the expanded role and capacity needed for PSCC, and strategies to maximize future revenue and provide a consistent funding stream.

This RFP submission should include the consultants approach to the business plan formation where participants are able to contribute, and work towards goals that they understand, believe in and helped create. Collaborating with other organizations to achieve a common end can be challenging and we want to know your thoughts on how to achieve the trust and respect that is the foundation for effective decision making within a statewide coalition. This is an opportunity for us to build trust and awareness, and requires a high level of facilitation skill, coordination and planning, and an understanding of the issues.

Our Strategic Plan reflects the communities that we serve across a geographically and demographically diverse state. Developing a business/operation plan for the PSCC is an important step in making this organization strong and relevant across the state. The PSCC's role is to advance the capacity and impact of all conservation land trusts throughout Illinois, and in order to do that we need to be able to provide impactful products, services and programs, all within the guidelines of a business/operation plan based on our strategic plan.

While PSCC's new strategic plan defines a number of strategic and business goals, this work will allow PSCC to focus on three of the essential strategic priorities: 1) Creating a business/development plan that provides a clear vision for the capacity needed for PSCC, along with a strategy to maximize future revenue support for long-term impact; 2) Increase the ability of PSCC to positively impact land trust work by implementing an organizational model led by permanent staff, and supported by outsourced contract labor and an engaged board and ; 3) Advance specific efforts to enable land trusts to build upon current momentum and powerfully speak with one voice in articulating the benefits of land and water protection on a statewide, regional, and local basis.

PSCC's new 5-year strategic plan outlines an ambitious vision to significantly expand the growth and impact of independent conservation land trusts throughout Illinois to



meaningfully increase the amount of land and waterways protected and stewarded in perpetuity. PSCC will help drive this growth by being the respected, collaborative conduit of the land trust community led by a dynamic executive director and supported by an active board of land trust experts, targeted contract staff, and a business plan to project financial clarity and security.

In this critical role, PSCC will specifically coordinate and launch model initiatives in land trust training and outreach and strategic collaboration, and advocate that sufficient scientific, human and financial resources are efficiently marshaled to protect the health of our State's natural infrastructure.

As a conservation "service center", the PSCC organization has the unique ability to add capacity and coordination to the entire sector of Illinois land trusts, and truly drive conservation at a grass roots, community-based level. PSCC believes that ongoing coordination of land trust work among independent land trusts – both in terms of advocacy, stewardship, and acquisition – will be greatly accelerated and made more permanent by collective focus and resource sharing.

**The following is a list of the Proposal documents to be reviewed by Applicants:**

- A) REQUEST FOR PROPOSAL & QUALIFICATIONS, PROPOSAL INFORMATION
- B) PSCC 2018 STRATEGIC PLAN, VISION AND GUIDING PRINCIPLES

**The following is a list of the Proposal documents to be submitted by Applicants:**

- A) CONSULTANT NARRATIVE OF APPROACH TO THE PROJECT (MAX. 2 PAGES)
- B) APPLICANT ORGANIZATIONAL AND EXPERIENCE CHART WITH RATES OF PAY FOR EACH INDIVIDUAL WORKING ON THE PROJECT
- C) APPLICANT EXAMPLES OF SIMILAR PROJECTS, REFERENCES AND PROFESSIONAL QUALIFICATIONS
- D) COMPLETED SCOPE OF SERVICES SUMMARY & BUDGET
- E) TIMELINE FOR INTERIM PROJECT BENCHMARKS
- F) ADDITIONAL SERVICES

**Any questions must be submitted by August 15, 2019.**

**Proposals Due:** August 22, 2019; **Project Completion:** February 28, 2020

**Proposals should be submitted electronically in pdf format to:**

**[pscc@prairiestateconservation.org](mailto:pscc@prairiestateconservation.org)**, attention Mary Vandevord.

**Project Budget:** NTE \$12,000

**Interviews for finalists will be held prior to Sept. 13, 2019**



## **Five-Year Strategic Plan**

*Adopted by the PSCC Board of Directors*

*March 1, 2018*

### **PSCC Vision**

The Prairie State Conservation Coalition (PSCC) envisions Illinois as a state that celebrates and promotes its rich natural landscapes – places that define our collective heritage, improve and anchor our economy, and enrich our quality of life by connecting people to nature and the outdoors.

To achieve this vision, we must significantly expand the growth and impact of independent conservation land trusts throughout Illinois to meaningfully increase the amount of land and waterways protected and stewarded in perpetuity. PSCC will help drive this growth by being the respected, collaborative conduit of the land trust community led by a dynamic executive director and supported by an active board of land trust experts, targeted contract staff, and financial security. In this critical role, PSCC will coordinate and launch model initiatives in land trust training and outreach and strategic collaboration, and advocate that sufficient scientific, human and financial resources are efficiently marshaled to protect the health of our State's natural infrastructure.

Success will mean more land saved while political and geographic boundaries are no longer viewed as impediments to collaborative strategies and funding, which are essential to guarding against environmental threats such as climate change. The success of existing land trusts will fuel the emergence or expansion of land trusts in areas of the State historically not covered. The resulting patchwork of protected landscapes and access to green space will give all residents a platform for improved health and wellness as well as economic health and community renewal. People of all ages will find joy in swimming, fishing, paddling, hiking, community gardening, sustainable farming or simply experiencing the beauty of nature.

### **PSCC Mission**

**Empower the conservation land trust community to fulfill the promise that our wild places and open spaces will be preserved for generations to come.**

## **PSCC Guiding Principles**

### **We Believe In:**

***Service to the Entire State:*** PSCC recognizes its role to connect, serve and advance the capacity and impact of *all* land trusts throughout Illinois, and through them, protect our land and water resources.

***Collaborative Leadership:*** We are grateful for and respect the work of member land trusts who are the backbones of leadership for PSCC. We also appreciate many other organizations, foundations, agencies, municipalities and individuals in Illinois that dedicate themselves to furthering conservation. We work collaboratively and transparently by leading, serving, convening and coordinating to best leverage the work of all for maximum impact.

***Building Trust and Awareness:*** We acknowledge that many within Illinois may not understand the value of its natural assets or the long-term effectiveness of community-based land trusts to protect the health of our land and water. Therefore, it is our responsibility to support and promote our membership by providing some of the educational tools and operational assistance necessary to build awareness, relevance and trust, and ensure that their work is honored in perpetuity.

***Reflecting the Communities We Serve:*** We acknowledge that Illinois is geographically and demographically diverse and that individual land trusts must be sensitive and responsive to that diversity. We are made more whole by fully reflecting and engaging the depth and breadth of the populations we serve.

***Nature Nurtures:*** Our individual physical, intellectual and spiritual well-being is dependent upon access to and engagement with beautiful, natural spaces. We believe that nature is good for the soul, and that everyone is entitled to experience the outdoors.

***Healthy Natural Ecosystems That Sustain Communities and Strengthen Economies:*** The allure of Illinois and the quality of life enjoyed by its residents is inextricably linked to the health of the natural environment. Natural ecosystems benefit our well-being, and our State's future economic health is dependent on the sustainable use of its abundance of natural resources.

**Program Goals**

***(Strategic, Measurable, Attainable, Realistic, and Timely)***

**Goal #1: Strengthen the conservation expertise and organizational capacity of land trusts throughout Illinois through expanded training and educational opportunities.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
Maintain/expand the relevance and quality of the topics presented at the annual meeting.	Communication and PSCC Board	Start at the annual training conference by seeking feedback throughout the planning process.	Communication's time
Continue to make connections for peer-to-peer learning and mentorship through the various Strategic Collaborations.	PSCC Board Strategic Collaboration subcommittee	Calendar Year 2018	Board subcommittee members' time
Promote non-LTA webinars for PSCC members; investigate whether PSCC could offer webinars free or at a discount to members.	Communication and a Board champion	Could be ready to go by Fall 2018	Communication's time and Board champion's time
Create a consistent scholarship program for the annual conference that expands the number and distribution of attendees.	PSCC Board	Ready for announcement at 3/19 annual conference	\$\$ for scholarships
Identify and regularly share significant conservation, organizational development, socio-economic, demographic and statutory trends which impact and influence the work of Illinois land trusts.	Communications and a Board champion	Immediate implementation; communicated or shared through existing or new channels.	Board Champion and Communication's time

Work with LTA to offer partial scholarships to organizations for organizational assessments	PSCC Board	Ready for announcement at 3/20 annual conference	\$\$ for scholarships
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*Potential Measurable Outcomes:*

- Land trusts accredited through the Land Trust Alliance Commission will hold three quarters of all land trust protected lands in the State
- All land trusts will adopt LTA’s Standards and Practices
- Sustainability of land trusts throughout the state as measured through self-assessment
- Number of Board and staff who have gone to annual meeting or availed themselves of other PSCC training/education
- Percentage of organizations who are represented at the annual meeting and/or have availed themselves of other PSCC training/educational opportunities.

*Potential Measurable Outcomes (for trends):*

- Land trusts adapt their operations protocols to reflect latest developments/trends

**Goal #2: Advance PSCC’s Strategic Collaboration Initiative by providing member land trusts with a suite of services and resources which leverages their ability to learn from each other and their efficiency in conducting business.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
The PSCC membership identifies a number of potential services which would be of shared benefit to Illinois land trusts. This list could be prioritized at the upcoming annual meeting. The top candidate services will be identified, and a Shared Services Subcommittee created.	PSCC board	2018 Annual meeting and Calendar Year 2018	Annual meeting – likely via a voting mechanism during break times?
The Shared Services Subcommittee of the PSCC evaluates the top candidate shared services and select those believed to provide the highest benefit and are reasonably achievable. A draft approach will be developed and presented at the June PSCC board meeting.	Shared Services subcommittee; PSCC’S Board Strategic Collaboration Chair; PSCC board	March-June 2018	Shared Service committee members

The PSCC board will continue to evolve the shared service(s) to be developed, and jointly determine issues, approach, timeline, resources and budget.	PSCC board	June board meeting	PSCC approaches funders for support to launch and approaches members for enrollment in the shared service structure.
A prototype shared service project will be developed and made available for testing.	Shared Services Subcommittee	Remainder of 2018	Likely will require contractor to implement
Implement initial offering/service to the membership in a phased roll-out	Shared Services Subcommittee, contractor	Early 2019	
Stay engaged in the Research Partners Stewardship Funding Initiative and/or examine the Land Trust Calculator as a valued tool for helping to project stewardship costs for all members	Research Partners and PSCC	Research begins early 2018	VLI grant funding for Partners; PSCC assistance voluntarily

*Potential Measurable Outcomes:*

- Accessibility of all land trust members to each other and key service providers
- Maintenance or reduction of operating expenses through collaboration or economies of scale
- “Map” the collaborations/connections annually to monitor growth and complexity (perhaps through the Strategic Collaborations Dashboard)
- Access to and use of critical sample documents
- New funding obtained by member LT(s) or collaborating LT’s with PSCC assistance
- Research Partners funding report shared with membership; further outcomes TBD

**Potential Offerings/Services:**

Best practices sharing  
Board development resources  
Fundraising resources  
Strengthen collaboration (regional activities, etc.)  
Assistance on accreditation (assessments, checklists, etc.)  
Assessment of organizational capabilities  
Collective bargaining for resources (healthcare, insurance, etc.)  
Leverage purchasing power (equipment, etc.)  
Membership/Expertise directory  
Consultants listing – attorney, appraisal, easements, mitigation, etc.  
Shared services (healthcare, administrative, HR, finance, defense, payroll)  
Illinois LTA – broker LTA offerings, vet relevant content, etc.  
Mentoring programs - Executive Director, Board members, etc.  
Hike directory by region (possible integration of hike app and IView)  
Host regional meetings (collaboration, training, networking, etc.)

**Content/Areas of Focus:**

- Easements (templates, examples, financials, etc.)
- Mitigation (templates, examples, financials, etc.)
- Prescribed fire (insurance, burn plans, schedules, etc.)
- Land restoration (technical information database, etc.)
- Risk management
- Real Estate transactions

**Goal #3: Develop tools to enable land trusts to consistently and powerfully speak with one voice in articulating the benefits of land and water protection.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
Develop print and digital materials for the land trust community in Illinois to use (and tailor) to communicate the case for conservation in Illinois.	PSCC Volunteer or hire marketing/graphic designer/copy-writer	2019	Grant to help with production costs

Review and solicit land trusts' needs related to I-View use. Expand and promote I-View capabilities or data as possible.	Contractor + identify backup expert	Ongoing; E.g. apply to present at LTA Rally in 2018	Contractor fees from PSCC budget; licensing fees to those outside the state
Develop communications about the Hike App and expand the use of the app so that all quadrants of the state are using it.	Contractor + identify backup expert	Communications-2018, Expansion ongoing	
More aggressively share/promote information and news relevant to the work of land trusts in Illinois through email alerts, social media, e-newsletter, and website updates with varied audiences, including legislators, foundations, and donors.	Contractor + identify backup expert	Ongoing	
Encourage land trusts throughout the state to participate and contribute their voices to the work of PSCC. Examples include surveys and individual meetings with land trusts	PSCC Volunteer, board members/subcommittee or a contractor	Ongoing	Web survey software, travel expense for board or contractor for meetings

*Potential Measurable Outcomes:*

- Completion and distribution of Illinois land trust/conservation video
- Completion of new brochure that tells all the why-what-how of conservation
- Expansion of data available through Hike App and IVIEW
- Expansion of Hike App and IVIEW users/subscribers/licensees

**Goal #4: Advocate for public policies and nurture a policy climate that enables conservation to flourish throughout the state.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
A new grant program under the Natural Areas Stewardship Act is positively affecting land stewardship across the state; and an ongoing media effort widely shares successful projects with elected officials and state agencies.	Government Relations Staff at Member or Partner Organizations (for example: Andrew Szwak at Openlands; Jen Walling or other staff at IEC); Communication	IDNR administrative process time frame; ongoing	Contractor fees for Communications; IEC membership dues
At least one land trust board or staff member visits each new state legislator within that legislator's first year of office	Recruit one PSCC member to organize	Organize in 2018 and launch in 2019, ongoing	TBD
At least once annually, the PSCC board offers members basic information about lobbying; sets talking points relevant to that year; and asks member land trusts to invite their legislators to attend an event.	Communication and PSCC Board President	calendar for eblast after June PSCC Board meeting, once annually thereafter	contractor fees for Communication; time of the PSCC Board Pres.
The PSCC Board forms a government relations team/subcommittee and accountability framework whose purpose is to build and maintain relationships with Illinois Environmental Council, League of Women Voters, gubernatorial and other high-level state office candidates and officials and others to scan and push opportunities for visionary public support for conservation, (e.g. Open Land Trust, Conservation 2000, conservation easement donation transferrable tax credits).	Need one lead from within the land trust community to spearhead and recruit	Plan 2018, solicit feedback on launch at 2019 Annual Meeting	This might be a good role for a paid contractor

The PSCC board regularly solicits feedback from members about legislative, legal and regulatory challenges they are facing (such as challenges to property tax exemptions; problems with the conservation easement statute, pesticide drift, solar energy issue/opportunity, et al). These challenges are catalogued, tracked and referred to the government relations team.	Communication and GR lead	Include request in June eblast and annually thereafter	TBD
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*Potential Measurable Outcomes:*

- IDNR grant program established as envisioned by the Natural Areas Stewardship Act
- Number of meetings between legislators and land trusts
- Number of local & state legislators who visit/tour protected properties
- Legislative coalition develops strategy to push for more state support of conservation
- New “campaign” developed to address issue of concern to land trusts  
Legislative coalition develops strategy to push for more state support of conservation

**Infrastructure Goals:**

**Goal #5: Strengthen PSCC’s human resources and capacity to deliver on goals and programs.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
Increase the ability of PSCC to positively impact land trust work by reorganizing into a model led by permanent staff, and supported by outsourced contract labor and an engaged board.	PSCC BOD	By 2019 Annual Meeting	Est. \$75K annual operating budget
Determine a “location” for new PSCC staff to be “headquartered”	Outreach to member land trust(s) via eblast and individual solicitation	Explore 2019	Arrangement TBD

Coordinate and collaborate with other statewide environmental coalitions (IEC, Vital Lands, etc.) to clarify the unique competitive advantages of each organization and take advantage of PSCC's important leadership role in Illinois conservation to improve efficiency and effectiveness.	BOD led meeting with partner organizations	By 2019	none
Establish and formalize board of director roles, responsibilities, feedback and evaluation protocol to ensure each board member (including non-officers) helps drive PSCC's mission while ensuring active support of the Executive Director model.	BOD subcommittee	2019	TBD
Create engagement opportunities for non-Officer Board members by establishing tangible and timely project responsibilities	Board Officers	First quarter 2018	TBD

*Potential Measurable Outcomes:*

- Staff and Board structures are completely aligned with strategic priorities
  - Hire an experienced and compelling Executive Director who is recognized throughout the state as leading our collective land trust vision
- Improved collaboration and delegation between staff and Board (or other assigned volunteers)
- Inclusion of permanent staff position(s); revision of by-laws to accommodate org change
- Secure funding and location for permanent staff
- MOU's outlining relationship with other NGO's

**Goal #6: Increase PSCC’s financial capacity to support the goals and initiatives of the 5-year strategic plan.**

<b>Strategies (in sequential order as appropriate)</b>	<b>Parties Responsible</b>	<b>~ Timeline (start &amp; end date)</b>	<b>Estimated Resources</b>
Create a business/development plan that provides a clear vision for the capacity needed for PSCC, and a strategy to maximize future revenue and provide a consistent funding stream.	BOD (subcommittee)	Begin Q1 2018 and complete Q1 2019	TBD
Being mindful not to compete with member land trusts for limited resources, pursue and secure an endowment to support PSCC’s ongoing work for the long-term.	BOD (in advance of final staff decisions)	Begin 2018	varied
Expand Sponsorship of Annual Meeting	BOD	Begin late 2018	Personal solicitation
At the request of member land trusts, pursue grants for individual project endeavors	Future ED and BOD	Ongoing	Grant writing
Examine ways to maximize the revenue potential of existing (or new) PSCC products such as I-View or the Hike App	BOD subcommittee/consultants	Begin 2018	Legal costs for licensing attorney
Increase membership (whether paid or scholarship) to include 100% of Illinois Land Trusts	PSCC BOD	By 2019	Phone calls and BOD resolutions.

*Potential Measurable Outcomes:*

- Operations budget has increased to a minimum of \$75,000 annually
- Permanent (contract and/or other) staff of 1-2 FTE