



**Request for Proposals
Justice, Equity, Diversity, and Inclusion (JEDI)
April 30, 2021**

Issued by:
Columbia Land Conservancy, Inc.
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Organizational Background

For more than thirty years, the Columbia Land Conservancy has worked to inspire our community to more deeply connect with, respect, and protect the natural world. We work with partners and volunteers to improve the health of the land, ensure a thriving farm economy, create environmental education opportunities, provide access to outdoor experiences, and support municipal leaders in conservation-minded decision making. Our website can be found at clctrust.org.

Mission

The Columbia Land Conservancy works with the community to conserve the farmland, forests, wildlife habitat, and rural character of Columbia County, strengthening connections between people and the land.

Vision

The Columbia Land Conservancy will be a dynamic force in supporting and sustaining a strong and vibrant rural community, where agriculture plays a central role in the economy, where development respects historic traditions and natural resources, and where there are accessible open spaces and abundant, healthy natural lands and wildlife habitats.

Core Values

In carrying out our work, the Columbia Land Conservancy is guided by the following core values:

- Stewardship - Columbia County's scenic landscapes, diverse wildlife habitats, and fragile natural resources are a trust to be conserved for future generations through sound stewardship practices.
- Community - A shared appreciation for the land contributes to a strong and healthy community. Our conservation agenda should be responsive to the needs and desires of the people who live here.
- Tradition - Agriculture has played a defining role in shaping Columbia County's natural environment and community character. The working landscapes of the countryside and historic rural patterns of settlement in hamlets, villages, and towns are central to our heritage and should be maintained.
- Collaboration - We collaborate with other groups and individuals with common objectives. We listen to all concerns. We treat everyone with respect.

Background

Since our founding in 1986, we have worked to protect Columbia County's rural character through several programs. Today, our board of [thirteen trustees](#) and [staff of twenty](#) [[staffing chart](#)] support programs including:

- **Land Protection** – We work strategically, collaboratively, and proactively to protect ecologically important natural lands, waters, wildlife habitats, forests, and farmland, guided by our Strategic Conservation Plan and in coordination with [regional partnerships](#). We promote land management practices that conserve the health of the land and mitigate/adapt to climate change. Alongside 230 private landowners, we have protected over 30,000 acres of land, many representing [donated conservation easements](#). We work to ensure important agricultural lands remain in production by serving as a resource for farmers and other land trusts. We coordinate the [Farmland Access, Resources, and Matching](#) (FARM) program to connect farmers and landowners and keep farmland in production. We have facilitated more than 80 matches between farmers and landowners through the Farmer-Landowner Match Program.
- **Public Conservation Areas** – We own and manage ten Public Conservation Areas, and balance providing public access to nature, open space, and recreation with maintaining and improving ecological health. These areas, over 4,000 acres, serve nearly 68,000 visitors annually as outdoor recreation centers, classrooms, and research sites. They are also the heart of CLC's volunteer program, with over 100 active volunteers each year.
- **Community Planning & Engagement** – We encourage and support municipalities to conserve important land and biological resources through land use policies and decision-making. We organize trainings/workshops and advocate for municipalities to adopt conservation-minded land use policies. Recently, we have developed a mini-grant program to support municipalities in their locally led conservation projects.
- **Education & Outreach** – We serve our community through our educational and public programming. This includes partnerships with local schools and community groups, providing environmental education programs free of charge, and engaging landowners in conservation-minded management through the [Landowner Engagement and Resource Network](#) (LEARN).
- **Operations, Communications, and Development** – An in-house team of support staff execute most fundraising, communications, and operations tasks for our organization. From our central office on Main St in Chatham, NY, we coordinate annually with nearly 1,000 individual supporters and 5,000 email subscribers locally and throughout the region. Last June, we sent an [email statement](#) regarding our commitments to growing in solidarity with marginalized peoples.

Case for CLC's Justice, Equity, Diversity, and Inclusion Efforts

In our last [strategic plan](#), CLC committed to “Conduct a diversity, equity, and inclusion assessment of our organization and develop plan to strengthen” as part of the overall goal to “strengthen the organization to ensure a sustainable future.” This initiative is also integral to our goal of “serv[ing] a broader cross-section of the community” through reaching a broader audience with a robust suite of programs.

Toward that goal, we have convened a JEDI working group in 2021 to ensure our collective efforts (board and staff) are meaningful, considered, and sustainable. We have delved into readings, developed our own internal working materials ([team operating procedures](#) and [team glossary](#)), and reviewed similar initiatives at other land trusts. [Our team charter articulates our intended purpose and initial workplan.](#)

Culminating from these efforts, we created an internal call-to-action statement to share with our colleagues why this work is critically important in fulfilling our mission as stewards of the land for future generations.

Equitable access to the natural world – the time is now.

Columbia Land Conservancy (CLC) acknowledges that BIPOC, LGBTQ+, immigrant, and differently abled communities have been historically denied equitable access to open spaces for health and well-being, personal enjoyment, land security, and food production. As we work to ensure that we are addressing the needs of future generations, CLC must be committed to celebrating and supporting Indigenous and non-white land stewards. We recognize that a diversity of voices and perspectives is critical in defining the work of land trusts, climate policymaking, food security, and environmental education. We know that barriers to entry still exist in outdoor recreation, agriculture, and advocacy due to race, ethnicity, socio-economic status, gender identity, ability, and language.

We admittedly have far to go on this journey and can only start by looking inwards at ourselves. CLC is beginning an organization-wide process of incorporating the principles of Justice, Equality, Diversity, and Inclusion (JEDI) into every facet of what we do. While starting with a small internal working team (three staff and three board members), we aspire that every board and staff member will be fully engaged in this work. We will also be looking to expand these efforts among all those with whom we share local resources – such as our volunteers, program participants, supporters, and fellow land trusts – in order to fulfill our mission of strengthening connections between people and the land. Our ability to collaborate and respond to the needs and desires of our neighbors is not only shaped by a shared sense of purpose, but our ability to be a genuinely inclusive community.

Objectives for CLC's Justice, Equity, Diversity, and Inclusion Work

Activities and Inputs

The consultant, alongside the JEDI working group (supported by the President and Board Chair), will provide overall project management for each objective in coordination with staff and trustee team(s).

Given the interlocking challenges of JEDI, we seek concurrent progress at three levels:

- Individual – CLC trustees and staff, personally and through their professional roles, have the interest and opportunity to effect change related to justice, equity, diversity, and inclusion.
- Operational – CLC commits our staff and program teams to think critically about how they can engage in practices that enact justice, equity, diversity, and inclusion while striving towards our strategic mission-oriented goals.
- Institutional – CLC commits as an organization to create and maintain structures that support a sense of belonging, value, and collective ownership of success in our work. Through CLC's work, we can enact justice, equity, diversity, and inclusion-focused social change in our communities, both in Columbia County and broadly in the conservation sector.

The objectives offered below represent our working JEDI plan, a work in constant progress, in the frame of the fiscal year 2022 (July 2021 – June 2022). We welcome alternate ideas and methods and are not unduly tied to any specific strategy or objective.

Toward meaningful JEDI change, we have outlined preliminary objectives in each level:

- Individual - Facilitate training of JEDI working group and staff/board trainings in inclusive work practices and active allyship, likely including but not limited to:
 - Education in frequently used and discussed JEDI terms and topics to develop a shared vocabulary.
 - Develop the internal call to action to encourage active implementation of JEDI practices as they pertain to CLC's work.
 - Educate and encourage best practices to engage staff and board members in the process as the work progresses.
 - Recommend and/or implement other JEDI learning opportunities to staff/board as necessary.
- Operational - Guide CLC's JEDI working group in planning, understanding a scope of work, and objectives for CLC staff and board JEDI initiatives, including:
 - Provide input on the JEDI working group team charter in framing the continued actions and workplan of the JEDI team.
 - Review CLC's mission statement through the lens of JEDI as an initial step in working towards the organization-wide goal of inclusivity.
 - Review CLC's strategic plan, including programs and committee work plans through the lens of JEDI as an initial step in working towards the organization-wide goal of inclusivity.
 - Review current/proposed CLC JEDI activities, initiatives, and opportunities and provide enhancements in the organization's actions, culture, and practices.

- Institutional - Gather information on CLC's internal and external (as applicable at this stage) "weak spots" – areas where CLC staff and trustees can be more inclusive and equitable in our participation with institutional and community systems.
 - Assess internal JEDI readiness against community needs and industry imperatives.
 - Assess current organizational culture and external relationships through staff, trustees, supporters, community partners, local constituents, etc.
 - Assess CLC's community impact and reputation regarding JEDI principles and bring feedback to inform further objectives and practices.

Expected Outputs and Outcomes

Toward CLC's continued JEDI progress, the consultant (with JEDI working group, board, and staff assistance) will produce recommendations and wise next steps regarding the scope of further work for CLC's JEDI efforts in the community, such as:

- Describing a direction and vision for CLC's successful JEDI work within the community.
- Outlining advisable equity commitments and strategies to expand our programming to the community as well as where not to focus.
- Proposing metrics to track and communicate progress.

Pursuant to the consultant's work alongside the Board Chair, President, and JEDI working group, CLC will achieve:

- Alignment and purpose within CLC's JEDI working group on next steps for staff and board engagement.
- Improved fluency and engagement with inclusive and equitable practices individually as we pursue ongoing JEDI work.
- Increased staff, board, and community engagement with JEDI principles more generally and for CLC specifically.
- Clear identification of the gaps and shortcomings of our current business practices in light of JEDI and our evolving communities.
- Clear identification of current business practices that are currently working and aligning well with our JEDI intentions at CLC.
- A visioning timeline for how CLC can continue growing JEDI efforts internally and with our community, accompanied by outcome measures across the organization to measure progress.
- Compelling JEDI strategy, goals, and next steps that we can use to guide the next phases of JEDI at CLC.

Instructions for Submitting Proposals

Proposals can be sent via email to heidi.bock@clctrust.org and must be received no later than May 28 at 1:00 p.m.

The proposals submitted will be the documents upon which CLC will make its initial judgment regarding each proposer's qualifications, methodology, and ability to provide the services contemplated by the contract.

Those submitting proposals do so at their own expense. There is no expressed or implied obligation by CLC to reimburse any firm for any costs incurred in preparing or submitting any proposals, preparing or submitting additional information requested by CLC, or participating in any selection interviews.

Submission of any proposal indicates an acceptance of the conditions contained in the RFP unless the submitted proposal clearly and specifically states otherwise.

CLC reserves the right to accept or reject any and all proposals in whole or in part, to waive any and all informalities, and to disregard all non-conforming, non-responsive, or conditional proposals.

Proposal Contents

The following submission components and requirements/guidelines apply to this Request for Proposal:

Proposal. In your proposal, please include a narrative proposal of no more than 6 pages outlining a detailed work plan or description of the activities to be conducted which should include the following:

- Estimated calendar for phased workplan, proportion of total consultant hours dedicated per objective, and concurrent scope of work for JEDI working group, staff, board, and others in each objective.
- Specific activities to be conducted under each objective, including points for gathering feedback and incorporating perspectives from CLC staff, board, partners, donors, volunteers, and community members.
- Key milestones, deliverables, and buy-in from stakeholders within each objective.
- A detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables.

Supporting Materials. Please include other supporting materials, including:

- Description of your qualifications.
- Relevant case studies and references demonstrating relevant constituencies with which you have experience.
- A list of information that you will need to access from CLC (i.e., meeting schedules, full board and board committees, policies and procedures, etc.).
- An outline of your team structure that would be dedicated to this project including roles, resumes, tenure, geographic location, and hourly rates. If your proposal includes work with a second consultant, please describe that relationship.

Budget. In your proposal, please include:

- A Lump Sum Fee for each objective identified above including justification. Provide a fee schedule with hourly rates for the key personnel identified in the work plan.
- List of other reimbursable expenses, etc., to support the scope of work
- Proposals may include alternative matters or items not specified or requested in this RFP. **However, all such alternative matters or items must be listed separately from the proposal and the cost(s) thereof must be separate and itemized.**
- The cost proposal must provide a guarantee that no additional fees beyond those proposed will be charged to CLC without CLC's prior written consent.
- The selected proposer(s) shall submit itemized bills, properly executed claim forms, vouchers, and such other necessary information or supporting documentation as may be required by CLC in order to process payment. Payment will be made upon milestones identified in your proposal and enumerated in the executed contract.

The cost of services is one of the factors to be considered in awarding this contract. Please see full criteria under "Proposal Evaluation."

Proposal Requirements, Guidelines, Timelines

Proposal Requirements

- Proposals must remain valid for a period of 90 days.
- If you have a standard set of terms and conditions, please submit them with your proposal. All terms and conditions will be subject to negotiation.
- CLC anticipates selecting at least two individuals or firms to have more in-depth discussions with and aims to make an award to one of these individuals or firms.
- The objective of this Request for Proposal is to locate a source that will provide the best overall value to CLC. While price is a significant factor, other criteria will also inform the basis of our decision.
- Notification of interest and submission of proposal should conform to the RFP timeline below.

Timeline

- Questions may be submitted by email to heidi.bock@clctrust.org and are due by COB May 14, 2021.
- Questions/answers will be posted at clctrust.org/about/employment on May 21, 2021.
- **Proposals may be sent via email to heidi.bock@clctrust.org and must be received no later than May 28 at 1:00 p.m. EDT.**
- Selected candidates will be notified of virtual interviews by June 11, 2021 (please note any known schedule conflicts between June 14 – June 18 in your proposal).
- Selection of preferred candidate(s) is anticipated to be completed by July 19, 2021.
- Negotiation of contract, estimate start and key deliverables dates, and final scope of work is anticipated to be completed by July 31, 2021 (standard contract terms to be reviewed in advance).

Specification Clarification

All inquiries with respect to this Request for Proposals shall be directed via e-mail to heidi.bock@clctrust.org before COB May 14, 2021.

Questions submitted by e-mail will be compiled and both questions and answers will be posted online in a Q&A document at clctrust.org/about/employment on May 21, 2021. Oral or other interpretations or clarifications will be without legal effect.

Contract

Any award of the work contemplated by this RFP shall be conditioned on the later execution of a written contract. CLC reserves the right to revoke or rescind any award at any time prior to the execution of a formal written contract. A sample professional services agreement is available upon request.

Proposal Evaluation

Proposals shall remain valid until the execution of a contract by CLC. Proposals shall be examined and evaluated by a committee consisting of CLC staff and trustees. A recommendation will be made to CLC's Board of Trustees for a contract award based on the following criteria:

- The proposer's demonstrated capabilities, professional qualifications, experience, and track record in related engagements

- The wherewithal of the proposer to render the requested services to CLC in a timely fashion
- The completeness of the proposal and its responsiveness to the desired services
- Cost-effectiveness.

Indemnification

The selected proposer will be required to defend, indemnify, and save harmless CLC and its officers, employees, and agents, from and against all claims, damages, losses and expenses (including without limitations, reasonable attorneys' fees) arising out of, or in consequence of any negligent or intentional act or omission of the selected proposer, its employees or agents, to the extent of its or their responsibility for such claims, damages, losses, and expenses.

Modification and Withdrawal of Proposals

Proposals may be modified or withdrawn by an appropriate document duly executed (in the manner that a proposal must be executed) and delivered via email to heidi.bock@clctrust.org prior to the opening of proposals.

Insurance, Security, and Other Legal Statements

Insurance Requirements

The selected proposer will be required to procure and maintain at its own expense reasonable insurance coverage, which must be issued by an insurer which is licensed to do business in the State of New York and which has an A.M. Best rating of not less than "A":

Each policy of insurance required for the completion of this work shall be in form and content satisfactory to CLC and provide that:

- The CLC shall be named as an additional insured on a primary and noncontributory basis.
- The insurance policies shall not be changed or cancelled until the expiration of thirty (30) days after written notice to the CLC. In addition, said policies shall be automatically renewed upon expiration and continued in force unless the CLC is given 30 days written notice to the contrary.

No contract will be signed and no work shall be commenced pursuant to this RFP until the selected proposer has delivered to the CLC, via the person named as described above, proof of insurance for any policies of insurance required to execute the contract to be procured by the selected proposer. If at any time, any of said policies shall be or become unsatisfactory to the CLC, the selected proposer shall promptly obtain a new policy and submit proof of insurance of the same to the CLC for approval. Upon failure of the selected proposer to furnish, deliver and maintain such insurance, the contract may, at the election of CLC, be forthwith declared suspended, discontinued, or terminated. Failure of the selected proposer to procure and maintain any required insurance shall not relieve the selected proposer from any liability under the contract, nor shall the insurance requirements be constructed to conflict with the obligations of the selected proposer concerning indemnification.

Statement of Rights

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

- To reject any and all proposals.
- To issue additional solicitations for proposals and/or amendments to this Request for proposals.
- To waive any irregularities in proposals received after notification to proposers affected.
- 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.
- To conduct investigations with respect to the qualifications of each proposer.
- 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.
- To enter into an agreement for only portions (or not to enter into an agreement for any) of the services contemplated by the proposals.
- 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.