Request for Proposals

West Coast Ocean Alliance Annual Summit Support

Background and Purpose

The West Coast Ocean Alliance (WCOA) is a regional ocean partnership focused on enhanced management and coordination along the West Coast of the U.S. by working closely with its tribal, state and federal government members. Ocean conditions are changing, new uses of the sea are emerging, and the authorities for ocean management are complex and overlapping. These West Coast-wide challenges are best evaluated holistically rather than through the lens of individual management entities. Our work will support healthy, resilient ocean ecosystems and communities that thrive on ocean resources.

The WCOA has embarked on a new suite of project efforts after receiving funding administered by the National Oceanic and Atmospheric Administration (NOAA) secured through the Bipartisan Infrastructure Law (BIL). The BIL authorized funding for established Regional Ocean Partnerships for five years to support the interstate and intertribal management of ocean and coastal resources.

The WCOA will resume hosting its hybrid annual meeting as the Annual West Coast Ocean Alliance Summit. The meeting will bring together all members of the WCOA to inform ongoing projects, as well as invited guests and stakeholders to learn about the latest WCOA activities and
gain public input. The meeting will include internal WCOA member discussion to inform future work and project strategic planning, and report on specific project progress and outcomes. The meeting will likely provide opportunities to engage with partner entities such as the West Coast Ocean Data Portal and Pacific Fishery Management Council, as well as include public comment opportunities for stakeholders to provide feedback to WCOA members and staff. Lastly, the meeting will provide the unique opportunity to connect all WCOA members over an extended amount of time to strengthen working relationships and identify new opportunities for collaboration.

**Annual Summit Objectives:**

- Connect WCOA members in person (and remotely) to provide a focused opportunity to inform WCOA strategic planning and future project activities.
- Report on the progress of current projects, and work to maximize uptake and utilization of project products by WCOA members.
- Provide an opportunity for formal public comment and informal stakeholder input on all WCOA activities to guide current and future regional priorities.
- Build awareness around WCOA activities and increase utilization of project products by regional stakeholders.
- Strengthen relationships between WCOA members, WCOA staff, partner organizations, and regional stakeholders.

**Additional Information**

The Annual Summit will be a 2-3 day meeting scheduled for October 18-20, 2023 in Portland, OR. WCOA will be hosting a Tribal Summit October 16-17 also in Portland, OR. A separate RFP has been published to support that event; however, coordination is likely to be required to ensure these events are synchronized.

The WCOA will be undergoing a strategic planning process throughout 2023 and a portion of this Summit may need to be dedicated to Strategic Planning.
The majority of the Summit will be invite only (for WCOA members); however, we may plan for a portion of the event to be public. Total attendance will likely be 80-125 (closer to 80 for the member-only portions). We estimate approximately 20% of the member attendance will be remote.

Proposal Requirements

Proposals shall not exceed 5 pages and shall include the following:

1. Firm name, address, contact name, title, phone number & email address.

2. A summary of relevant meeting planning and facilitation experience.

3. A description of your proposed approach to meeting planning.

4. Identify who will be involved on your project team, their role, and resumes that show their relevant experience. (Each resume should be no longer than two pages. Resumes do not count toward the proposal page limit.)

5. Suggested project timeline with major tasks and milestones.

6. Project budget by task, including a breakdown by time, materials, and travel.

Eligibility

Consultants should be experienced in planning engaging workshops for audiences of 75-150 people. In addition, experience working with state and federal agencies and Tribal governments is highly preferred. Experience running hybrid meetings is required.

Per 2 CFR § 200.321, applicants with state or federal certification as a small and minority business and/or women’s business enterprise will be given preference.

Scope of Services

At a minimum, the scope of work should include a description of the proposed approaches for:
- Engagement with WCOA Staff and Leadership Team to clarify expectations and desired outcomes of the Annual Summit;

- Reviewing relevant documents and background materials identified by the WCOA;

- Collaborate with WCOA Staff and Leadership Team on designing the Summit agenda;

- Determine best facilitation methods to reach Summit objectives (listed above);

- Facilitate the Summit.

- Provide logistical support at the Summit.

- Develop meeting summary and follow up materials.

**Project Budget**

Not to exceed $40,000 including labor and travel. A separate budget will be used for meeting expenses such as venue, WCOA member travel, meeting materials, technology, etc.

The WCOA has a separate budget for meeting expenses as follows:

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting materials (document printing, nametags, easel pads, etc.)</td>
<td>$2,000</td>
</tr>
<tr>
<td>Facility and A/V Rental</td>
<td>$15,000</td>
</tr>
<tr>
<td>Transportation and/or event rental</td>
<td>$6,000</td>
</tr>
<tr>
<td>Conference meals and refreshments</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

**Project Timeline**

Work should commence upon contract signing and all deliverables must be finalized by November 30, 2023.
Scoring Criteria

Proposals will be evaluated by WCOA staff (Executive Director, Project Coordinator, and Tribal Coordinator) and Members (Tribal, state, and federal government representatives) using the following scoring criteria.

<table>
<thead>
<tr>
<th>Element</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expertise in event planning and coordination, including details on key personnel</td>
<td>_____ / 25</td>
</tr>
<tr>
<td>Previous work experience with Tribal governments</td>
<td>_____ / 10</td>
</tr>
<tr>
<td>Previous work experience with federal and state governments</td>
<td>_____ / 10</td>
</tr>
<tr>
<td>Approach, thoroughness, and completeness of the proposal, including the extent to which the approach will accomplish the objectives listed above</td>
<td>_____ / 30</td>
</tr>
<tr>
<td>Experience running hybrid meetings</td>
<td>_____ / 10</td>
</tr>
<tr>
<td>Budget alignment with the objectives and proposed approach</td>
<td>_____ / 10</td>
</tr>
<tr>
<td>Small and minority business, women’s business enterprise</td>
<td>_____ / 5</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>_____ / 100</td>
</tr>
</tbody>
</table>

Submitting a Proposal

Please submit your proposal to jobs@westcoastoceanalliance.org by midnight (Pacific) Friday, July 14, 2023. Questions and requests for additional information should also be sent to jobs@westcoastalliance.org.

If questions are received from potential applicants, a question and answer document will be added to the WCOA website.