



Request for Proposals

West Coast Ocean Alliance Tribal Caucus 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 host a hybrid meeting in 2023 to support technical and engagement capacity of Tribal Nations on the West Coast. The meeting will bring together the Tribal Caucus of the WCOA (Tribal Nations and Tribal servicing Organizations) along with invited representatives and indigenous collaboratives that aim to support meaningful consultation, data sovereignty, energy sovereignty, technical and programmatic capacities of Tribal Nations, Tribal stewardship and

co-management of marine resources, and similar. The primary purpose of the meeting will be to convene the WCOA Tribal Caucus on ocean and marine science and policy as it relates to Tribal Nation land and resource stewardship in the U.S. West Coast. The format of the meeting should prioritize inclusion of Tribal staff and leadership as well as invited speakers or other WCOA members as determined by the Caucus. The meeting format has not been determined but will promote information sharing and can include facilitated discussions and relevant breakout sessions, as well as provide opportunity for relationship-building between sovereigns.

Tribal Summit Objectives (*These objectives will need final approval by the Tribal Caucus*):

- Convene Tribal Leadership and staff to share the latest updates and perspectives on priority ocean and marine initiatives and issues for Tribes;
- Knowledge sharing via Tribal Leadership, staff and Tribal experts as a means to support Tribal Nation capacity for individual sovereigns and collectively discuss prior work of the Tribal Caucus and explore appropriate role(s) for the Tribal Caucus with respect to ocean and marine stewardship;
- Provide opportunities to engage in ongoing strategic planning activities of the West Coast Ocean Alliance;
- Strengthen inter-Tribal relationships and increase awareness of Tribal perspectives, initiatives and authorities (potential audience: federal, state, Tribal organizations or experts, and non-governmental stakeholders);
- Identify regional needs and associated actions for the Tribal Caucus moving forward.

Additional Information

The West Coast Ocean Tribal Caucus Summit will be a hybrid 2 day meeting tentatively scheduled for October 16 and 17, 2023 in Portland, Oregon. WCOA will be hosting its Annual Member Summit October 18-20 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 will likely need to integrate with those activities and the consultant team supporting it.

We anticipate having a closed portion of the Summit (Tribal Nation, Tribal Servicing, and Tribal experts only) and potentially setting aside some time for federal or state engagement depending on Caucus priorities. Total attendance will likely be 30-60. The meeting will be a hybrid format and should be as inclusive as possible of remote attendees.

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, especially for hybrid meetings.
3. A description of your proposed approach to meeting planning.
4. Three client references.
5. 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 page limit.)
6. Suggested project timeline with major tasks and milestones.
7. Project budget by task, including a breakdown by time, materials, and travel (if proposed).

Eligibility

Consultants should be experienced in planning engaging workshops for audiences of 30-60 people. Experience working with Tribal governments is required. Experience with federal and state agencies is strongly 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, WCOA Leadership Team, and Offshore Wind Summit Planning Committee to clarify expectations and desired outcomes of the strategic plan;
- Reviewing relevant documents and background materials identified by the WCOA;
- Collaborate with WCOA Staff and WCOA Tribal Caucus on designing the Summit agenda;
- Determine best facilitation methods to reach Summit objectives;
- Facilitate the Summit on-site and for virtual participants;
- Provide logistical support at the Summit;
- Develop meeting summary and follow up materials as appropriate.

Project Timeline

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

Project Budget

Not to exceed \$30,000 including labor and travel.

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

| Item | Amount |
|---|----------|
| Meeting materials (document printing, nametags, easel pads, etc.) | \$1,000 |
| Facility and A/V Rental | \$12,000 |
| Transportation and/or event rental | \$5,000 |
| Conference meals and refreshments | \$5,000 |

Scoring Criteria

Proposals will be evaluated by WCOA staff (Executive Director, Project Coordinator, and Tribal Coordinator) and Tribal Caucus members using the following scoring criteria.

| Element | Score |
|--|-------------|
| Expertise in event planning and coordination, including details on key personnel | _____ / 20 |
| Previous work experience with Tribal governments (required) | _____ / 10 |
| Previous work experience with federal and state governments | _____ / 10 |
| Approach, thoroughness, and completeness of the proposal, including the extent to which the approach will accomplish the objectives listed above | _____ / 25 |
| Experience running hybrid meetings | _____ / 10 |
| Budget alignment with the objectives and proposed approach | _____ / 10 |
| References | _____ / 10 |
| Small and minority business, women's business enterprise | _____ / 5 |
| TOTAL | _____ / 100 |

Submitting a Proposal

Please submit your proposal to jobs@westcoastocceanalliance.org by midnight (Pacific) Friday, July 14, 2023.

If you have any questions or would like more information about the RFP please contact WCOA Tribal Coordinator Margaret Corvi at mcorvi@westcoastocceanalliance.org / 541-808-7357 or jobs@westcoastocceanalliance.org.