

RFP FOR OUTREACH AND ENGAGEMENT CONSULTANT Climate Pollution Reduction Grant

Central Pines Regional Council, Durham, NC

TABLE OF CONTENTS

SECTION 1 - INTRODUCTION & SCHEDULE

SECTION 2 - SCOPE OF SERVICES & REQUIRED DELIVERABLES

SECTION 3 - SUBMISSION REQUIREMENTS

SECTION 4 - EVALUATION CRITERIA

SECTION 5- SUBMISSION DOCUMENT TEMPLATES

Section 1: Introduction and Schedule

1.1. Definitions

The following definitions apply to this RFP:

- Community-based organizations (CBO's) are organizations who are trusted local sources of information and assistance to people at a neighborhood, neighborhoods, city, county, or regional scale.
- Greenhouse gas emissions or GHG emissions are air pollutants that hold heat in our atmosphere. The largest sources of these emissions are the burning of fossil fuels like coal, oil, natural gas, and gasoline to create energy—typically at power plants or for vehicles like cars and trucks. Some GHG emissions come from methane that is formed in oxygen free environments like landfills.
- “Principal” shall mean the key team member of the consultant firm responsible for making all significant decisions (administrative as well as business) on behalf of the firm. This person shall be one of the signatories of the contract if awarded.
- “Proposal” implies “Statement of Qualifications” in response to this Request for Proposal (RFP).
- “Metro area” in the case of this RFP is the entire two-MSA area for Raleigh-Cary and Durham-Chapel Hill, including the counties of Person, Granville, Orange, Durham, Wake, Franklin, Chatham, Johnson.
- [Metropolitan statistical areas](#) (MSA) are delineated by the U.S. Office of Management and Budget (OMB) as having at least one urbanized area with a minimum population of 50,000.

1.2 Background

Central Pines Regional Council (CPRC) is a regional council of government that was awarded a four-year metro-area Federal Planning Grant-Climate Pollution Reduction Grant (CPRG) by the United States Environmental Protection Agency (EPA) in August 2023. The overall goal of this grant is to develop a metropolitan (metro)-area Priority Climate Action Plan (PCAP), a subsequent metro-area Comprehensive Climate Action Plan (CCAP), and a Status Report for the Metropolitan statistical areas (MSA) of Raleigh-Cary and Durham-Chapel Hill. In keeping with the State of North Carolina efforts, the emissions sectors to be included in these plans/reports are:

- Electricity Generation
- Transportation
- Residential Energy Consumption
- Commercial/Institutional Buildings Energy Consumption
- Industrial Energy Consumption
- Waste Management Operations
- Agricultural Activities
- Carbon Sequestration

CPRC views this grant as an opportunity to engage our local community in a level-setting exercise—to take a global issue and make it local. Climate change is a huge global issue that can be intimidating to think about, let alone be tasked with thinking about how to solve it. How can we work with stakeholders in our region to envision solutions that are tailored to us, our unique needs, and that will inspire people? Talking about change can be scary, but it can also be exciting. What is a positive and exciting outcome for our area that moving to clean energy can create? How can we get there? What do you want your grandchildren’s lives and your great grandchildren’s lives to look like?

1.3 Introduction

- This Request for Proposal (hereinafter RFP) is being issued by CPRC to execute stakeholder outreach and engagement for the CPRG planning grant in support of the development of two climate plans, the first completed climate plan is due to EPA at the end of February 2024 and the second completed plan is due to EPA July 2025. CPRC seeks proposals from qualified consulting firms (Consultant) based out of North Carolina to develop a stakeholder engagement strategy and associated implementation materials for stakeholders in Metropolitan statistical areas (MSA) of Raleigh-Cary and Durham-Chapel Hill for two Climate Action Plans- Priority Climate Action Plan (PCAP) and Comprehensive Climate Action Plan (CCAP). Deliverables will include materials development, workshop delivery, and extensive community-based organization support for conducting equitable engagement, with an emphasis on effective engagement of low-income and disadvantaged communities.

- In order to achieve effective stakeholder engagement and equitable community engagement in working with local low income and disadvantaged communities, the following are highly desired in a consultant:
 - Locally based (this is a mandatory requirement).
 - The proposal team is representative of the diverse 2-MSA community.
 - The proposal team has reasonable experience working directly with low income and disadvantaged communities and community-based organizations (CBO's) in the 2-MSA region.
 - The proposal team has existing relationships with leaders/representatives/active residents of low income and disadvantaged communities in the 2-MSA region.
 - The proposal team has reasonable understanding and experience in engaging with and developing outreach materials for diverse stakeholders such as municipal officials, business leaders, planners, residents, renters, minority communities, youth, seniors, etc.
 - The proposal team's business is a certified Micro- Locally Based Enterprise (LBE) and Small LBE firm, MBE/WBE, or B-Corp

1.4 Contract Award

The anticipated contract terms are as follows:

Not to exceed amount: \$145,000

Period of Performance: Nov 2023- Nov 2025

Please note, the contract award is set at \$145,000 and we do not have any ability to increase this. Any submitted proposals exceeding this amount will not be considered and rejected outright. If there are elements where the Consultant would like staff support from CPRC and their academic team then that should be outlined in as much detail as possible.

1.5 Schedule

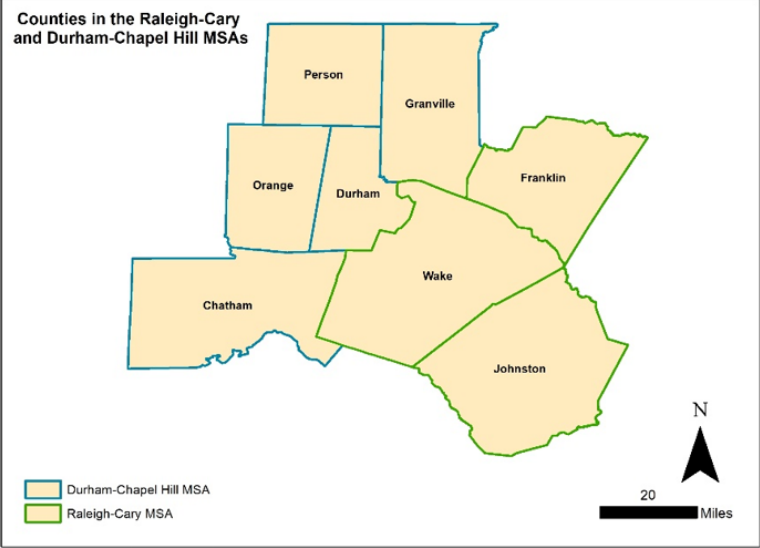
Phase	Deadline
RFP Issued	Sept 18, 2023
RFP Information Webinar (Virtual)	Sept 25 th , 2023 from 4PM to 5PM EST
Optional scoping meeting	To schedule a meeting send an email to Project Lead, Emily Barrett at ebarrett@centralpinesnc.gov
Deadline to submit proposals	Noon EST, October 2nd, 2023
Shortlisted applicants invited for an interview/discussion at CPRC office in Durham, NC	Oct 4 th -5 th

Award Notice and Contract Completion	October 2023
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Section 2: Scope of Services

This project has a very quick turnaround given the timelines dictated by the EPA as the federal funding agency for this grant. All work done under this RFP must fall under the 2-MSA’s of Raleigh-Cary and Durham-Chapel Hill.

There are 8 counties in the 2-MSA region, and the expectation is that the deliverables address outreach needs for populations in all these counties.



We acknowledge that given the short turnaround for PCAP (February 29, 2024), the approach and tactics used to develop the PCAP will likely differ from approach and tactics used to develop the CCAP.

Deliverables	Due Date
<p>Develop a draft high-level metropolitan (metro)-area Stakeholder Outreach and Engagement Strategy and schedule with outline of supporting materials that will be developed for the Priority Climate Action Plan (PCAP) and the Comprehensive Climate Action Plan (CCAP).</p> <p>The completed PCAP is due to EPA on 2/29/2024. The completed CCAP is due to EPA July 2025. The consultant is not responsible for completing the PCAP and CCAP plans, however the consultant will be responsible for drafting an outreach and engagement strategy that informs and feeds information into these two documents that will be submitted to EPA under the CPRG planning grant process.</p> <p>Feedback on this outreach and engagement strategy draft will be provided by the Triangle Sustainability Partnership on 12/4/2023. This remote meeting is scheduled for 9AM to 10AM EST on 12/4/23.</p>	November 30, 2023
<p>Revise and finalize Engagement and Outreach plan according to feedback.</p>	December 8, 2023
<p>Conduct at least 6 large in-person workshops and summarize details (location, timing, attendance, and summary of stakeholder feedback) for input into the PCAP</p>	November 2023 to January 2024

Develop, Test, and Finalize CBO Toolkit	February 2024
CBO Support for Toolkit (limited to 4 hours per CBO—may include travel to CBO to support and give feedback during a CBO-led workshop)	March 2024 to May 2025

Specific Sub-Tasks	Description
<p>Develop a 2-MSA-wide stakeholder engagement strategy that shall be utilized to collect inputs to develop both - Priority Climate Action Plan (PCAP) and Comprehensive Climate Action Plan (CCAP)</p>	<p>Stakeholder engagement strategy development for the 8 counties in the 2 -MSA grant region. The developed strategies should be effective in giving attendees a level-set on basic information about climate change in our region, engaging and collecting inputs on implementable climate pollution reduction strategies and actions, from multiple key stakeholder groups such as elected officials, municipal officials, planners, residents (urban and rural), renters, minorities, youth, seniors, people facing accessibility issues, immigrants etc.</p> <p>The developed strategies should have an emphasis on engagement with potentially low income and underserved communities. Separate from this scope of work, CBO’s will be contracted by CPRC to work with Contractor to serve as trusted points of contact in the community. Consultant will develop a toolbox of materials for CBOs to use in engagement. More on this deliverable is below.</p> <p>The developed engagement strategies should be delineated for different groups of stakeholders. These should be wide ranging such as tabling at local community events, engaging with faith leaders, online polling, social media, climate ambassadors, mass media, translation of materials in different languages, virtual meetings, website presence, webinars etc.</p> <p>The recommended strategies for any given stakeholder group must consider strengths, needs, abilities, and barriers of that group. As an example, a complex tech heavy tactic may not be best option for senior population; organizing an in-person meeting for low-income populations has barriers of childcare, travel costs, losing work time etc.</p> <p>In addition to other tactics that reach all eight counties, consultant must conduct 6 in-person public meetings, distributed for</p>

	<p>convenience for the eight counties in the 2-MSA region, to collect inputs from stakeholders as a part of the process to develop the greenhouse gas mitigation strategies. Costs for room rental, food, and any associated meeting costs should be included in overall proposal costs.</p> <p>We are interested in strategies that will increase engagement, including press releases and discussions with the media to create interest in in-person meetings or feedback tactics that may be recommended.</p> <p>CPRC has an outreach and engagement staffer who can commit 3-4 hours each week to the implementation of this strategy in partnership with Consultant. The kinds of tasks that this person can engage in are press release drafting and release, social media posts, webinar engagements, etc. We have additional staff support within CPRC and in our academic partnerships, however the 3-4 hours from the outreach and engagement staffer is a higher level of specialized expertise that is available for direct work on this project.</p> <p>It is important to note that CPRC is hiring an Outreach and Engagement consultant for your particular expertise. We expect that you will make recommendations for engagement that have not been listed in this RFP. You can distinguish yourself by demonstrating a knowledge of demographics (like those in https://carolinaacross100.unc.edu/) and advising on how to connect with what is unique to each county/region. If the Consultant has recommendations for the CPRG outreach and engagement that we have not included, or elements that we have missed, we strongly encourage you to include those in your proposal. This will reflect a strong, capable, creative, and constructive team approach.</p> <p>Consultant may also want to reference EPA CPRG guidance on meaningful engagement here: CPRG Training, Tools and Technical Resources US EPA</p>
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<p>Workshop delivery of 6 large in-person workshops</p>	<p>A large in-person interactive workshop to collect inputs from multiple stakeholders on GHG reduction tactics – what is most important to them. The tactics should span across all the emission sectors:</p> <ul style="list-style-type: none"> • Electricity Generation • Transportation • Residential Energy Consumption • Commercial/Institutional Buildings Energy Consumption • Industrial Energy Consumption • Waste Management Operations • Agricultural Activities • Carbon Sequestration <p>The reduction tactics should be categorized for each stakeholder group based on its broad affordability, needs and abilities. As an example, replacing a gasoline car with an EV or getting a higher efficiency HVAC are mostly unviable tactics for an average income family (even upper middle class) mostly because of associated costs. However, tactics like incentives to reduce those costs like combining discounts with low-or-no-interest loans may make these accessible to some. Also, tactics that help to build jobs and the local economy may be of more interest to people living in counties with higher unemployment rates, or to those who have had issues finding employment.</p> <p>Additionally, lack of infrastructure and other resources as barriers, which are outside the control of individuals must be considered and noted while developing the GHG reduction tactics for all groups of stakeholders.</p> <p>CPRC will summarize existing climate plans and tactics in the two-MSA region. This summary will be available to Consultant immediately.</p> <p>The information collected at the consultant-led workshops will feed into the PCAP that will be developed by the CPRC team in partnership with two local universities.</p>
<p>Develop toolbox materials for CBO’s and training CBO’s on this toolkit.</p>	<p>Develop materials which will be utilized by local community-based organizations (CBO’s) to engage the the communities they work with, including low income and disadvantaged communities. CPRC will release a separate RFP inviting CBOs in the region to conduct community engagement to collect inputs on GHG reduction tactics for the CCAP.</p>

	<p>Develop materials for CCAP engagement beginning with level-setting information about climate change and the most meaningful local tactics possible to reduce GHG emissions. This should include basic information about climate change from a statewide and local perspective. This can include the NC Clean Energy Plan as well as information and graphics from local plans and efforts like the City of Raleigh’s Community Climate Action Plan, the Town of Hillsborough’s Comprehensive Sustainability Plan, Orange County’s Draft Climate Action Plan, and Cary’s Count Me In Sustainability and Climate Action Strategy, and those materials from the CPRG Priority Climate Action Plan.</p> <p>All the materials developed must have easy to understand, interesting, visually appealing graphics/information with minimal bureaucratic citations.</p> <p>The consultant is strongly encouraged to use best practices around climate communication, including guidance that is part of the Yale Program on Climate Change Communication.</p>
<p>CBO toolkit is a specific outcome amongst other outreach materials.</p>	<p>The consultant will develop a CBO toolkit. The toolkit is intended to be used by local community-based organizations (CBO’s) for conducting in-person outreach amongst their target audiences which will include low income and disadvantaged communities. CPRC will release a separate RFP inviting CBOs in the region to serve as local connections to the community for this project.</p> <p>The consultant should plan to test the draft toolkit by collaborating with at least one local CBO with insights into reaching low-income and traditionally marginalized communities; the toolkit should subsequently be refined and finalized. This CBO should be identified in the proposal. <i>The CBO (and the individuals who participate in the testing) must be given fair compensation by the consultant. These costs should be clearly listed in the budget submitted.</i></p> <p>The toolkit should be comprised of simple, relatable and meaningful engagement strategy(ies) of 1-2 hr. duration, which will level-set on climate change information and help the implementing CBOs to collect input from their communities on actionable GHG reduction tactics while keeping in mind the economic hardships and environmental justice realities of these communities.</p>

	Consultant will be expected to train the CBO's on the use of this toolkit.
Providing extensive support to CBO's for conducting equitable engagement, particularly in low-income and disadvantaged communities.	<p>CPRC will release a separate RFP inviting CBOs in the region to utilize the toolkit developed by the consultant to engage with their communities to collect inputs on actionable GHG reduction tactics for CCAP.</p> <p>The consultant will act as a “train the trainer” for toolkit deployment for the CBOs awarded the separate community engagement grants by CPRC.</p>

Section 3: Submission Requirements

The proposal must be submitted in full compliance with guidelines and instructions as described below.

- Submit your proposal via email to Emily Barrett and Shuchi Gupta, at ebarrett@centralpinesnc.gov and sgupta@centralpinesnc.gov by **Noon EST on Monday October 2, 2023.**
- All proposals must include the following documents:
 - Submission document #1: Cover Document (see template below)
 - Submission document #2: Qualifications and Experience of the Team
 - Submission document # 3 Project Approach: Should include project approach, broad stakeholder groups to be covered, schedule, budget, CBO partnership to test the toolkit.
 - Appendices (if any)
- If you would like to submit hard copies of your proposal, please email Ms. Barrett and Ms. Gupta to make appropriate arrangements.
- Late or partial submittals will be considered as failure of compliance with submission requirements rendering the proposal ineligible for consideration.
- Any proposal with a submitted budget higher than \$145,000 will be rendered ineligible for consideration and rejected outrightly. If there are elements where the Consultant would like staff support from CPRC and their academic team then that should be outlined with as much detail as possible.
- File size: The size of a pdf file cannot exceed 5MB as these may be rejected by our email system. Ensure to compress and zip your files if they exceed 5 MB.
- Font size: Minimum 11-point size
- Font Type: Calibri or Times New Roman
- Margins: One-inch margins should be provided on all sides (excluding header and footer).

- Page Orientation: All pages should be properly oriented for screen viewing so that the portrait pages are presented in portrait mode and all landscape pages are in landscape mode.
- Page numbering: All pages should be properly numbered.
- Submitted pdf's should be readable in Adobe and shall not require additional software or plug-ins to be read and navigated.

3.1 Reporting, Invoicing and Reimbursement

- a. Monthly meeting with CPRG staff to review progress and get feedback.
- b. Quarterly invoices to be submitted to CPRG in templates provided once the contract is executed.
- c. All invoices will be reimbursed within 30 days upon review and approval.

SECTION 4: EVALUATION CRITERIA

1. Keeping in mind the tasks expected to be completed under the deliverables, all consultant proposals received will be first evaluated by CPRG staff on the following criteria:
 - Locally based in the 2-MSA region with proposal team staff who live locally.
 - Demonstrated hands-on experience in stakeholder engagement with wide ranging audience such as elected officials, state and local government staff, area residents, community-based organizations, low income and marginalized communities.
 - Has existing working relationships with local communities, in grant region, which are home to diverse population groups in terms of race, ethnicity, rural background etc.
 - Demonstrated ability to produce variety of outreach materials for effective community engagement with diverse audiences –including people from low income and disadvantaged communities, renters, youth, seniors, minorities etc.
 - Demonstrated ability to communicate with a wide array of stakeholders about climate change.
 - Degree to which this RFP fits the capabilities and strengths of the consultant.
 - Has existing staff capacity to kick off the project as soon as the award is made.
 - Has capacity and ability to complete the project according to the timeline.
 - Demonstrated instances of agility and creativity in project approach.
 - Demonstrated ability of applicant to produce measurable results.
 - Willingness to learn, be open-minded and empathetic.
2. The shortlisted applicants will then be invited for an in-person interview/discussion at CPRC office in Durham for selection of final applicant to be awarded the contract.

Submission Document #1: Cover Page

(Submit as a PDF)

1. Consultant (Primary Applicant)

- a. Principal
- b. Title
- c. Email
- d. Best Phone Number

2. Consultant's Organizational Information

- a. Name
- b. Address
- c. Web address
- d. Name of the President/Executive Director
- e. Staff size
- f. Does your organization's top leader/President/Executive Director identify as a person of color (POC), belong to an ethnically diverse minority?
- g. Organization's vision and/or mission statement
- h. Organization's total annual operating budget for each of the past 3 years
- i. Highlight any staff/leadership related ethnic/cultural/linguistic (etc.) diversity related information that helps you work more effectively within your communities of work.
- j. Highlight any governing board and/or volunteer pool related. ethnic/cultural/linguistic (etc.) diversity related information that helps you work more effectively within your communities of work.
- k. A brief description of your organization's work in promoting equity and inclusion in client work (or in specific projects) over past 2-5 years (Suggested word limit: 500).
- l. A brief description of what your organization has done in its own journey to become diverse, equitable and inclusive internally over past 2-5 years (Suggested word limit: 300).

3. Co-Applicant (if any) (Submit information similar to that of Primary Applicant)

4. Co-Applicant's Organizational Information (if any) (Submit information similar to that of Primary Applicant)

Submission Document # 2: Qualifications and Experience

(Submit as a PDF)

Note: This project has a very quick turnaround given the timelines dictated by the EPA as the federal funding agency for this grant. The deadlines have absolutely no flexibility as the deliverables of this grant are federally-driven by our grant terms.

Please be mindful of your staff capacity when applying since there are key deliverables due soon after award.

For each team member who would be working on the submitted proposal, please provide the following:

1. Name
2. Title
3. Role on the project (including approx. time to be spent)
4. Qualifications
5. Experience with stakeholder engagement and development of outreach materials on climate issues.
6. Experience with low income and disadvantaged communities:
 - a. Any existing relationships with such communities
 - b. If yes, provide a brief description of both the community itself and the nature of the relationship.
 - c. Brief description of work done with the community including the time when the work was done.

Submission Document #3: Project Approach
(Submit as a pdf)