



Background

The 1990 Farm Bill enabled State Forestry Agencies to fund Urban and Community Forestry (U&CF) programs. One of the four conditions to states receiving federal funding is a U&CF State Council. The purpose of a State Council “is to act as a forum for the exchange of ideas, information, and needs between the various entities who influence the state’s U&CF resource.” A State Council can provide the State Forestry Agency with an extended network for the delivery of technical information in the following three major areas: 1. Knowledge & awareness, 2. Urban forestry and arboricultural education & training, 3. Urban forestry communications.

Summary

The South Carolina Urban & Community Forestry Council, d.b.a. Trees SC, was founded in 1990 as a non-profit organization to foster the stewardship of South Carolina’s urban and community forests through education, advocacy, and networking. Trees SC is a collaboration of individuals, organizations, and agencies dedicated to our state’s trees. Together, we work to foster the stewardship of South Carolina’s urban and community forests through education, advocacy, and networking.

Trees SC’s Board of Directors has determined the need to go through the strategic planning process to determine progress, create a five-year strategic plan and to strengthen organizational capacity to implement future action.

The terms 'contractor,' 'company,' and 'consultants' shall be deemed interchangeable throughout this Request for Proposal (RFP), and any references to one shall include the others unless explicitly stated otherwise.

REQUEST FOR QUOTE Strategic Planning Consultant

Trees SC is soliciting quotes from qualified consultants for the facilitation of the strategic planning process to assist in determining and documenting strategic direction of Trees SC.

The selected consultant will provide support to Trees SC’s Board of Directors and Board appointed leadership team. The strategic planning process is estimated to take six months, beginning in January 2025, and ending in July 2025. The quote should be inclusive of all work, including the completion of a written plan detailing goals, strategies, priorities, and performance measures.

A final strategic plan document must include the following in detail:

Strategic areas of focus and service priorities for the next five years

1. Goals and objectives to meet priorities
2. Activities and programs that will support goals, including partnerships with other organizations/sectors
3. Performance metrics with specific measurements connected to improvement and impact
4. Staffing and resource plan
5. Financial plan

All proposals received will be treated with the highest confidence and will be used internally in our decision-making process. Proposals should not be more than five pages (including any appendices and references), double spaced, 12-point font, and 1-inch margins. **All proposals are to be submitted via email to info@treessc.org no later than August 15, 2024, at 5pm.** A decision will be made as promptly as possible with implementation preparations to begin in October 2024. Information about Trees SC is available at TreesSC.org and questions may be submitted via email to info@treessc.org.

Project Description

Trees SC's board is looking to the future and embarking on strategic planning activities which provide our organization with clear goals, objectives and strategic priorities for 2026 – 2031 on how we will impact urban and community forestry.

Strategic Planning Objectives

1. Complete an internal assessment of the organization, report on the current environment. Report & assess organizational strengths, weaknesses, opportunities, and threats (SWOT).
2. Facilitate a strategic planning retreat.
3. Develop a strategic plan to include:
 - Vision, mission, long-term and short-term goals, objectives, and activities
 - An annual operational plan (with specific tasks, timelines and responsibilities identified)
 - An effective evaluation plan inclusive of appropriate checks and measures

Scope of Services

1. Organizational Review and Assessment, Review of Current Environment, SWOT Analysis & Deliverables
2. Attend The Trees SC Annual Board Retreat January 15-17, 2025 - Annual Retreat, Pinopolis, SC (food and lodging excluded from Lump Sum)
3. Board Planning Retreat & Deliverables
4. Strategic Plan - Organizational Objectives, Strategies and Measures of Success & Deliverables

Proposal must include the following information:

- **Company information to include company legal name, name and title of person authorized to enter into contract, address, telephone number and email address**
- **Statement regarding the ability to provide the services outlined in this document**
- **Outline, Timeline and Project Schedule on the completion of the process, having all documents to include, at a minimum, internal assessment of the organization, current environment report, SWOT report and Strategic Plan deliverables**
- **Overview of timing and requirements to hold a Board Planning Retreat. List what the objectives of the meeting will be and what deliverables will come from it. Assume for travel pricing the meeting will be in Columbia at 5500 Broad River Rd**
- **Communication Plan identifying project manager and the primary contact between Consultant and Trees SC**
- **Responsibilities of the Consultant**
- **Responsibilities of Trees SC**
- **Information required from Trees SC to complete the planning process**
- **A Lump Sum Price to complete Strategic Plan including all consultant costs**
- **Recent Clients List that you have completed strategic plans for and with**
- **References with names and contact information of not less than three recent clients, preferably similar in size to Trees SC (references to other non-profits preferred)**
- **Contractual terms your organization will require**

Terms & Conditions

Individuals and organizations providing a proposal agree to the following terms and conditions:

- Successful bidder will not release records or information related to Trees SC unless an application for public information is submitted and approved by Trees SC Board of Directors.
- Trees SC reserves the right to reject any or all quotes received, to request clarification of any quote, to waive informalities or irregularities; and to award a contract not based solely on the lowest cost.
- Pricing included in your quote must be valid for at least 60 days and may not be modified, withdrawn or canceled.
- Trees SC will not pay for receipt of any information requested herein, nor is it liable for any costs incurred by the participant in responding to this request. All quotes submitted become the property of Trees SC; they will not be returned.
- None of the information released either verbally or in writing during this request for proposal period shall be deemed binding to Trees SC in any manner.
- All quotes or offers must be signed by a duly appointed officer or agent of your company.

Evaluation

1. All responses are subject to a determination of "responsive" and "responsible" prior to award. Trees SC is the sole judge as to the Proposer's "responsiveness" and "responsibility." Trees SC reserves the right to request additional information.

2. Trees SC will review all proposals and reserves the right to request necessary modifications, waive minor technicalities, reject all proposals, reject any proposal that does not meet the mandatory requirement(s), or cancel this RFP, according to the Trees SC's best interests.
3. Trees SC evaluation team may elect to interview one or more proposing companies before making an award. Trees SC shall not reimburse the company for the costs associated with the interview process. Trees SC assumes no responsibility for costs incurred in responding to this RFP.
4. Trees SC evaluation team may elect to first rank proposals with a simple numeric score and then detail score only the top tier of proposals.
5. Trees SC will evaluate top tier proposals on a weighted evaluation system.

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Experience, Past Projects, References	Points Based	40 (40% of Total)
2.	Approach to Project and Capacity	Points Based	40 (40% of Total)
3.	Price	Points Based	20 (20% of Total)

Trees SC's Timetable

July 1, 2024 - Issue Request for Quote

September 1, 2024 - Requests Due

November 1, 2024 - Estimated Contract Award Time Frame (pending budgetary and qualifications criteria)

January 2, 2025 - Begin Strategic Planning Activities

January 15-17, 2025 - Annual Retreat, Pinopolis, SC (mandatory consultant participation) This is not the Strategic

August 1, 2025 – Final Draft of Strategic Plan Due from Consultant

November 6, 2025 – Adoption Date

Trees SC shall not discriminate and shall prohibit discrimination in its selection and retention of contractors, subcontractors, and suppliers, against any person or business on the basis of race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, status as a parent, age, disability, genetic information, or military status. Trees SC recognizes that disparate treatment on any such basis in the pursuit of economic opportunities is intolerable discrimination.

Adjustments in Scope or Quantity of Work

Trees SC reserves the right to increase or decrease quantities of work included by the specifications or to delete entire proposal items from the proposal schedule, either before execution of the agreement or during the agreement term. If related services are desired by Trees SC that are not covered by the specifications above or in the signed contract, the fee shall be negotiated, and a written work order issued accordingly by Trees SC. The contractor shall not be

entitled to compensation for additional services unless a prior written work order has been executed describing the work and specifying the compensation thereof.

Subcontractors

The awarded Company agrees that it shall not delegate, subcontract, or assign all or any portion of the project to any third party without the express written consent of Trees SC.