

Request for proposal: facilitation for organizational retreat



The [Schatz Energy Research Center](#) at Cal Poly Humboldt is currently seeking facilitation for an all-team strategic retreat that will help us articulate our values and develop a shared vision for our work.

This retreat will be held either virtually or in a hybrid format in Humboldt County, California. We expect this retreat may be broken into two or more smaller segments across several days.

Outcomes from the retreat sessions will be used to:

- Develop action items and integrate our vision and values throughout our institutional practices
- Inform our strategic planning and project development processes, and
- Update our mission and guiding principles, and our equity, diversity, and inclusion strategies.

Who we are

Since 1989, the Schatz Center has been a leader in applied research and project development for clean and renewable energy. Our current portfolio includes microgrid development, sustainable transportation design, carbon life cycle analysis, solar product testing, offshore wind feasibility studies, and planning and policy for clean energy access around the globe.

[Cal Poly Humboldt](#) recently became California's third polytechnic university, and the Schatz Center is one of our campus' leading research institutes. Our interdisciplinary team currently includes 34 professional staff and 10 student researchers. Since 2020, many of our staff have been working remotely from home or at project sites.

Our facilities are located on the campus of Cal Poly Humboldt in Arcata, California. Arcata's 800-acre community forest and 11 miles of trails begin one block away, and we are within biking distance of California's second largest inland bay and the Pacific Ocean. As residents of a rural coastal community, we are keenly aware of our social and environmental responsibilities. We are committed to increasing energy access and resilience for communities worldwide — and do so through clean and renewable design that reduces climate change and restores environmental and human health.

We are also committed to the ongoing development of a safe, inclusive, and collaborative work environment that supports the growth of each team member. This organizational retreat will be

following an all-staff, four-month training program on equity, diversity, and inclusion, and should build thoughtfully on those efforts.

Retreat format

Our last all-staff retreat was held in August of 2018. Historically, our retreats have been in-person, daylong events, which we have held about every 3 years.

We plan to hold our next retreat in August 2022. Due to COVID-19 and because some of our team members live outside the region, we anticipate that the format will be composed of several virtual or hybrid sessions of 2 to 3 hours each. We look forward to guidance from the facilitation team on making the retreat inclusive and productive for all team members.



Cal Poly Humboldt in Arcata, California

Scope of work and deliverables

1. Provide knowledge and insight on best practices for facilitating virtual and hybrid retreats that welcome and elicit honest and open contributions from all staff.
2. Meet virtually and collaborate with retreat committee members to develop an agenda and retreat plan.
3. Deliver and facilitate the retreat sessions, including materials development, event note-taking, webinar/meeting management, etc.
4. Provide a detailed and organized record of staff input, suggestions, and opinions generated during the retreat sessions, and develop a post-event staff survey.
5. Meet with the retreat committee for a post-event debrief.

Qualifications and proposal elements

- Minimum three years of experience in facilitating organizational retreats
- Experience in facilitating virtual and hybrid retreats or similar events
- Clear understanding of issues and challenges that face higher education and/or nonprofit research institutions serving the public and private sector

The Center will accept proposals until no later than **Monday, April 4, 2022 at 9 am PST** via email to schatzenergy@humboldt.edu. Please submit your proposal in PDF format, and include the following five elements:

1. Contact information
2. Summary of facilitation experience that includes: (a) a list of retreats conducted, including format (virtual, hybrid, in person) and category of client (government, nonprofit, academic, private), and (b) a description of key strategies and techniques used with other organizations of similar size and scope to the Schatz Center's program
3. Proposed work plan and timeline
4. Cost information that includes a rate sheet, the estimated number of hours and cost per task for the consultant, and the estimated level of effort per task for Schatz Center staff
5. Resume of key personnel and three professional references

These elements may be submitted as separate documents or combined into one.

Evaluation criteria

Proposals will be considered on the following basis:

- Includes all required elements
- Demonstrates experience, understanding, and success with organizations of similar size and scope
- Proposed approach and timeline align with Center objectives and schedule
- Cost is competitive and commensurate with effort

RFP Schedule

Proposal deadline:	April 4, 2022 at 9 am (PST)
Anticipated start date	June 1, 2022
Anticipated retreat	August 2022

Questions?

For inquiries, please contact the search committee:

- Maia Cheli – maia.cheli@humboldt.edu
- Charles Chamberlin – charles.chamberlin@humboldt.edu
- Carisse Geronimo – carisse.geronimo@humboldt.edu