Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONSULTANT SERVICES
TECHNICAL ASSISTANCE TO SUPPORT CHESAPEAKE BAY PROGRAM GOALS AND OUTCOMES – FISHERIES, HABITAT, AND SCIENTIFIC, TECHNICAL ASSESSMENT & REPORTING

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SECTION I - INTRODUCTION

1.1 Purpose

The purpose of this Request for Proposals ("RFP") is to invite entities experienced in various aspects of fisheries, habitat, watershed science and policy, climate resilience, monitoring, and other watershed issues to submit proposals to the Chesapeake Bay Trust ("the Trust"). The Trust has been designated to receive federal funds from the U.S. Environmental Protection Agency as part of the Chesapeake Bay Program ("CBP") Goal Implementation Team Project Initiative. The work to be supported will advance specific outcomes from the 2014 Chesapeake Bay Watershed Agreement that have been identified as top priorities to address, and these stretch across all Goal Implementation Teams ("GITs") and workgroups.

This RFP includes two "projects" that have been separated into two individual Scopes of Work (Scopes #2 and #3). Offerors can bid on one or more of the individual Scopes of Work, with each Scope of Work addressed in a separate proposal. The two individual Scopes of Work are listed below, and scope details and qualifications of Offerors are described in more detail in the sections that follow. A maximum bid amount is listed for each Scope of Work. Cost will be a factor in evaluation of bids as described in Section IV.

The Trust has been designated to receive federal funds from the United States Environmental Protection Agency ("EPA") as part of the CBP GIT Project Initiative to advance specific outcomes from the 2014 Chesapeake Bay Watershed Agreement. Awards under this RFP for Scopes #2 and #3 will be issued as "contracts". The Trust will establish and manage the contracts in compliance with Title 2 Code of Federal Regulations (CFR) 200 and the terms of the federal funding by the US EPA (CFDA# 66.466) through the Cooperative Agreement 96341401 dated 5/18/19.

The source of the CBP GIT Project Initiative is federal funding. Therefore, awarded projects must adhere to federal requirements regarding contracting, including contracts with consultants and the purchase of supplies and equipment. For example, contractors shall obtain multiple estimates/bids for subcontracted services over $3,000 and use good-faith efforts to engage Disadvantaged Business Enterprises (DBEs), including Minority Business Enterprises (MBEs), Women Business Enterprises (WBEs), and Small Business Enterprises (SBEs).

1.2 Scopes of Work and Offeror's Minimum Qualifications

This section provides a description of the two Scopes of Work, maximum bid amount, project outcomes, project steps and timeline, expected deliverables, and minimum qualifications. A general description of each Scope of Work item is included in Appendix A.

List of Scopes of Work:

Scope #	FFY20 Scope Title	Maximum Bid Amount	Award Details
Scope of Work 2	Volunteer Monitoring Support for Macroinvertebrate Sampling to Fill Chesapeake Bay Program Data Gaps	$50,000	One contract will be awarded
Scope of Work 3	Developing Communications and Guidance on Shoreline Protection Options for Coastal Landowners	$50,000	One contract will be awarded

Note, as applicable, reports, data, and deliverable products shall be provided to the GIT technical leads sufficiently in advance of the end of the contract date in order for an effective iterative process to take place before the contract terminates. These materials, depending on the nature of the deliverable, should be provided in draft report form or in the form of a GIT or workgroup summary presentation. This will allow technical leads, GITs, workgroups, and other CBP partners to review, provide comments, ask questions, and get clarification related to the project directly from the awardee. This draft review process should be reflected in all RFP responses where applicable; awardee hours should be allocated to the oral presentation of final draft results to the CBP via one webinar. The appropriate CBP lead, in cooperation with the awardee, will determine when that presentation would be most advantageous. Any substantive comments, questions or edits received through this process shall be incorporated into the final deliverable products. A table of project deliverables and timeline must be developed as part of the Offeror's proposal that will account for this iterative process (Section 3.5).

1.3 Scope of Work 2: Volunteer Monitoring Support for Macroinvertebrate Sampling to Fill Chesapeake Bay Program Data Gaps (Maximum Bid Amount: $50,000)

Goal Implementation Team (GIT): Scientific, Technical Assessment & Reporting (STAR)

Purpose and Outcomes: Infrastructure and equipment for volunteer monitoring groups are needed for macroinvertebrate sample collections to contribute to decision-making data to fill gaps identified in the Chesapeake Bay Program's (CBP's) Strategic Research and Science Framework: https://www.chesapeakebay.net/who/group/scientific_and_ technical_analysis_and_reporting.
This Framework was developed as an approach to identify and prioritize short- and longer-term science needs. The Framework results will be used to help focus existing science resources, and leverage the research enterprise, to more effectively provide science to advance Chesapeake restoration and conservation efforts and decision making.

Approximately 90% of the catchment areas within the Chesapeake Bay Watershed have data gaps associated with macroinvertebrate sampling. This scope will cover the entire Chesapeake Bay Watershed to fill macroinvertebrate sampling gaps while ensuring compliance with local Coronavirus Disease 2019 (COVID-19) safety protocols for personal protective equipment (PPE), maximum individuals per group, social distancing requirements, and any other requirements associated with field sampling and training.

This Scope focuses on the following Outcomes:

- Purchasing and providing equipment for macroinvertebrate sampling events that will be completed by volunteer monitoring groups to fill benthic data gaps.
- Developing macroinvertebrate training resources through a written protocol and two published training videos for volunteer monitoring groups.
- Improving the resolution of data and density of existing monitoring sites - by coordinating with volunteer monitoring groups to conduct more sampling events at existing sites OR by communicating with volunteer monitoring groups to sample new monitoring sites to represent a greater diversity of watershed conditions that are not currently sampled or under-sampled by agencies and institutions.

The ultimate idea is that volunteer monitoring groups would follow a specified protocol for collecting and preserving macroinvertebrate samples developed by the contractor as part of this scope to fill current benthic data gaps. These volunteer monitoring groups would then bring their collected and preserved samples to a common event at a later date where volunteer monitors gather each year, perhaps a State monitoring meeting (such as the Maryland Water Monitoring Council) or a regional event (such as the Watershed Forum in Shepherdstown, WV) as part of their regular travels. The contractor could organize and gather the samples at the event(s) and provide to the EPA attendees at the event(s). Any volunteer team/group contributing samples will eventually receive results of their work. It is expected that this scope will contribute to more robust models that are used to fill data gaps in space and time for the Stream Health Indicator and progress assessing goal attainment with the Stream Health outcome.

Project Steps and Timeline:

Step 1: 12/1/2020 to 12/31/2020
Attend an initial (virtual) meeting with the Stream Health Working Group and the Scientific, Technical Assessment & Reporting (STAR) team to discuss gaps in existing watershed sampling and targeting of areas that will be valuable to filling gaps and enhancing the robustness of the existing model used to fill gaps in unsampled regions. Maps of under-sampled areas will be provided to the winning bidder. A discussion of potential volunteer teams and monitoring groups that may want to collect and contribute samples will also be included in the initial meeting.

Step 1 Deliverables:

- Meeting minutes and summary of initial meeting (word).
- List of gaps in watershed sampling and targeted areas to fill data gaps and to enhance robustness of the model used to fill gaps in unsampled regions as required in the Strategic Science and Research Frameworks needs (word).
- List of volunteer teams and monitoring groups that may want to collect and contribute samples (word).

Step 2: 12/1/2020 to 12/31/2020
Develop a Draft Quality Assurance Project Plan (QAPP), respond to comments on draft QAPP, and submit a signed and approved Final QAPP.

Step 2 Deliverables:
- Draft QAPP (word).
- Final and Approved QAPP (word and pdf).

Step 3: 12/1/2020 to 4/1/2021
Develop a draft list of field equipment and supplies suitable to support COVID-safe considerations for volunteer monitoring groups to effectively collect and preserve/store samples for laboratory processing. Make the assumption that at least 100 samples over a period of 3 to 5 years could be collected. Anticipated equipment items to create field kits will include but may not be limited to: PPE, D-nets, field work tables, pans to pick bugs, grids for randomizing fields to choose bugs, entomology tweezers, jewelers loop magnifiers, tablecloths, sample sorting sieve bucket, preservative alcohol for preserving bugs collected, and gallon-two gallon containers for preserving a sample. Submit a final list of equipment and supplies for sampling. Purchase the supplies after EPA approval of the final equipment list. Purchase enough supplies for at least 10 volunteer monitoring groups to simultaneously conduct macroinvertebrate sampling.

Step 3 Deliverables:
- Draft and Final list of field equipment and supplies (word).
- Financial documentation of purchased equipment and supplies (pdf).

Step 4: 4/1/2021 to 12/31/2021
Consistent with the CBP Stream Health Working Group guidelines for macroinvertebrate sampling, propose a location for field training(s) of sample collection, preserving, and storing *AND* provide training to groups of volunteers on sample collection and assessment in a COVID-safe approach to working in the field. The bidder should include all costs associated with travel to training(s) as well as any costs for the training location(s) in their budget for this scope.

Step 4 Deliverables:
- Draft and Final materials for training (word and pdf).
- List of all attendees that attended the training (excel).

Step 5: 1/1/2021 to 12/31/2021
Produce a training video on a COVID-safe approach for the field sample collection process of stream insects, data recording and sample storage requirements preparing samples suitable for laboratory processing – the *unpicked* sample collection approach (i.e., samples that have debris *and* bugs in the jar from the sample and sieving process). The training video produced should be between 10 and 30 minutes in length.

Step 5 Deliverable:
- Final training video (video file).

Step 6: 1/1/2021 to 12/31/2021
Create written procedures for individuals and volunteer monitoring groups interested in doing additional work with the samples by picking samples to create clean (debris-free, bug-only) bug samples for

laboratory processing to save time and money by the professional entomologist in the laboratory.

<u>Step 6 Deliverable:</u>

- Draft and final written procedures (word and pdf).

Step 7: 6/1/2021 to 12/31/2021
Produce an advanced training video on the process to correctly take the unpicked field sample and create a picked sample of bugs of a target sample size (e.g., 100 or 200 bugs) using a picking tray and a randomization process for collecting the bugs from the tray. The training video produced should be between 10 and 30 minutes in length.

<u>Step 7 Deliverable:</u>

- Final training video (video file).

Step 8: 12/1/2020 to 12/31/2021
Attend quarterly meetings for one year with the Stream Health Work Group and CBP STAR regarding: progress updates; status and issues discussion and resolution; any prioritization for site selection; sharing product development and review; sharing of accounting for samples; and related information needs and support.

<u>Step 8 Deliverable:</u>

- Summary of quarterly meetings attended (word).

Step 9: 12/1/2020 to 12/31/2021
Submittal of final deliverables, including the created GIS data layers of any sampling that was conducted by volunteer monitoring groups to address the data gaps. Publish the final training videos on a public website supporting the reference needs of volunteer monitors on macroinvertebrate sampling and sorting according to both an unpicked and picked approach.

<u>Step 9 Deliverables:</u>

- Final GIS data layers and metadata.
- Final training videos (two) on a public website.

<u>Stakeholder Participants:</u>

- Stream Health Working Group
- Scientific, Technical Assessment & Reporting (STAR)
- USEPA-Wheeling/USEPA-Philadelphia/USEPA Headquarters
- Volunteer monitoring groups in areas where priority gaps for sampling are identified
- Experts as necessary from Federal, State, Local agencies and academic institutions

<u>Summary of Deliverables (see details in Steps 1 through 9)</u>:

- Meeting minutes and summary of initial meeting
- Develop a Draft and Final/Approved QAPP
- Develop of list of gaps in watershed sampling and targeted areas to fill data gaps and to enhance robustness of the model used to fill gaps in unsampled regions as required in the Strategic Science and Research Frameworks needs.

- Develop a draft and final list of equipment needed to establish an inventory of sampling equipment that adheres to COVID-19 safety guidelines.
- Submit proof of purchase and financial backup documentation of required equipment that was purchased and will be used by the volunteers.
- Develop a written protocol published on a public website for volunteer monitoring support.
- Develop two training videos published on a public website supporting volunteer monitors reference needs on macroinvertebrate sampling and sorting according to both an unpicked and picked approach.
- Develop GIS data layers of any sampling events that occurred as part of this scope.
- Proof of published training videos (two) on a public website.

Quality Assurance Project Plan (QAPP) Requirement: Yes, a QAPP will be required for this Scope for sample collection, sample picking, and sample preservation as well as writing the protocol.

Qualifications of Applicant: Bidders familiar with macroinvertebrate monitoring programs, extensively networked with volunteer monitoring groups, GIS and sampling design experience, and history of coordination and collaboration on monitoring projects in the Chesapeake Bay watershed.

1.4 Scope of Work 3: Developing Communications and Guidance on Shoreline Protection Options for Coastal Landowners (Maximum Bid Request: $50,000)

Goal Implementation Team (GIT): Sustainable Fisheries Goal Implementation Team / Vital Habitats Goal Implementation Team

Purpose and Outcomes: The goal of this project is to develop content that can be used to communicate potential shoreline protection options with landowners, with an emphasis on natural and nature-based methods, including living shorelines. Improved communication will contribute to increased awareness and behavior change among coastal landowners considering shoreline modification projects, as well as shoreline management (marine) contractors that implement these projects. A successful project outcome would be a change in the perspective of coastal shoreline owners about living shorelines, that eventually lead to a change in their behavior due to accessible and easily understandable shoreline information. The primary target audience is coastal landowners, with shoreline management contractors as the secondary audience for this project. Living shorelines experts and the general public are tertiary audiences. This project will focus on the geographic regions of Virginia (VA), Maryland (MD) and Delaware (DE).

The winning bidder will be expected to develop communications products and deliverables based on the recommendations in the *Shoreline Implementation Plan* (https://cbtrust.org/wp-content/uploads/16788_Draft-Shoreline-Implementation-Plan-2020-09-09.pdf). The goal of this social marketing scope was to conduct research, design strategies and improve materials to help shoreline properties in the Chesapeake Bay reduce excessive shoreline erosion, prevent sediment, nitrogen and phosphorus pollution, and create healthy ecosystems by reducing shoreline hardening and installing living shorelines. As part of this plan, *Survey Results of the Shoreline Management Barriers and Benefits Report* was also competed and is located here: https://cbtrust.org/wp-content/uploads/16788_Final-Survey-Results-%E2%80%93-Shoreline-Management-Barriers-and-Benefits.pdf. The *Shoreline Implementation Plan* seeks to understand high impact behaviors, perceptions and barriers surrounding nature-based approaches to shoreline hardening, inform messaging and ways to reach target and secondary audiences (landowners, shoreline management contractors, engineers). The report strongly recommends that deployment of social diffusion strategies by engaging local organizations and trusted residents to be "ambassadors" can spread awareness, knowledge and information. We recognize that multiple options exist for reaching owners who have upland vegetation, an existing living shoreline, or no current armor.

For the final product for this scope , the winning bidder will use the existing resources listed below to brainstorm and develop additional communications and guidance products that focuses on educating coastal landowners on shoreline permitting processes and the benefits of natural and living shorelines. This scope will focus on developing materials and the creation of engagement campaigns/materials for targeted outreach that include a collection of best practices to effectively engage residents in the three variety of shoreline tiers (no armor, upland vegetation, living shorelines).

Project Steps and Timeline:

Step 1: 12/1/2020 to 12/31/2020
Attend a kickoff meeting with the project advisory team (made up of Bay Program subject matter experts and coordinated/setup initially by the CBP) to set expectations, provide resources for getting started and share points of contact. The winning bidder will check in on a regular basis with the project advisory team (in-person or via webinar at least quarterly).

In addition to the resources noted below, the winning bidder will gather available shoreline and permitting information from MD, DE and VA, as well as existing programs, trainings and outreach campaigns that target shoreline property owners and shoreline management contractors as part of a Literature Review. The project advisory team will assist in providing key contacts and making connections to facilitate gathering permitting information.

The winning bidder will also review previously completed research and suggested implementation strategies outlined in the *Shoreline Implementation Plan*: https://cbtrust.org/wp-content/uploads/16788_Draft-Shoreline-Implementation-Plan-2020-09-09.pdf. In addition to the strategies outlined in this plan, the winning bidder will develop a list of other recommendations to engage shoreline property owners. The winning bidder will, in consultation with the project advisory team, create a list of implementation strategies that they plan to put into action.

Other Information and Resources to Review:

- *Survey Results of the Shoreline Management Barriers and Benefits Report*: https://cbtrust.org/wp-content/uploads/16788_Final-Survey-Results-%E2%80%93-Shoreline-Management-Barriers-and-Benefits.pdf
- Existing research results on shorelines in the Chesapeake Bay, including Landowner surveys such as the two VIMS surveys below:
  - https://www.vims.edu/ccrm/outreach/workshops/2019/presentations/5_stafford_propertyowners.pdf
  - https://www.vims.edu/ccrm/_docs/nsf_project/nsf_propertyowner_report.pdf
- Permitting steps specific to each state jurisdiction and application instructions
- Comparisons of hardened versus nature-based shoreline effectiveness, ecosystem services, resilience to storms, maintenance costs, lifespan from the three sources below :
  - https://estuaries.org/wp-content/uploads/2018/08/RAE_LS_Barriers_report_final.pdf
  - https://www.habitatblueprint.noaa.gov/living-shorelines/
  - https://ewn.el.erdc.dren.mil/
- Example shoreline program: https://elizabethriver.org/living-shorelines-shoreline-buffers
- Previously funded project led by Vital Habitats Goal Implementation Team, https://www.wetlandswork.org (a similar end-product for shorelines is envisioned, if a website-based

communications strategy is recommended

- Web model http://floridalivingshorelines.com/
- https://coastalscience.noaa.gov/project/influence-shoreline-changes-chesapeake-delmarva-bay-ecosystems/
- Research from VIMS (unpublished), previous Sustainable Fisheries Goal Implementation Team funded project, to establish thresholds for shoreline hardening beyond which forage species are impacted. See June 2019 research update in the two sources below:
  - https://www.chesapeakebay.net/channel_files/37472/tuckey_sfgit_june_2019_forage_fish_and_shorescapes.pdf
  - https://www.chesapeakebay.net/channel_files/37472/seitz_cbt_thresholds_06-27-19_rev.pdf
- The Delaware Living Shorelines Committee provides a great example of a website that shows information and resources for providers and landowners who wish to implement living shorelines: https://www.delawarelivingshorelines.org
- Use similar approaches as shown in the existing https://www.wetlandswork.org website case studies

Step 1 Deliverables:

- Meeting minutes and summary of initial meeting (word).
- Annotated list of resources being reviewed by the winning bidder (excel).
- List of recommendations to engage shoreline property owners (word).

Step 2: 1/1/2021 to 2/28/2021

Continue gathering above-referenced shoreline information. Work with the project advisory team to identify example shoreline sites to highlight and implement initial outreach strategies to identify natural or living shoreline ambassadors. This list will augment an existing list provided to the winning bidder of potential living shoreline ambassadors. Ambassadors are members of a local community who have implemented a living shoreline on their property and are willing and able to provide information and assistance to their neighbors. Conduct outreach to see if landowners from the list would be willing to participate as an ambassador. Research any potential funding sources/grant opportunities for living shorelines and total maximum daily load (TMDL) projects. Specify criteria of funding, and develop a database summarizing the results.

Step 2 Deliverables:

- List of *updated* references and summary of resources collected by building on Step 1 (excel).
- List of shoreline sites to highlight and implement initial outreach strategies (excel).
- Updated database with any newly identified ambassadors, engaged local organizations and landowners (excel).
- Literature Review that takes into account existing shoreline and permitting information from MD, DE, and VA, as well as existing programs, trainings and outreach campaigns that target shoreline property owners and shoreline management contractors.

Step 3: 3/1/2021 to 5/31/2021

Based on the list of ambassadors previously developed in the *Shoreline Implementation Plan* as well as any newly-identified ambassadors by the winning bidder for this scope and research conducted, the winning bidder will develop a list of 6 to 10 potential case studies (requesting two to three each in MD, VA, and DE (the CBP Communications Office will build these case studies into three-to-five longer success stories). The project advisory team will review the list of possible case studies and provide a final list to the CBP Communications Office. Conduct interviews with shoreline landowners

(ambassadors or success story cases) and shoreline management contractors (at least two total interviews conducted per state) and develop audiovisual footage, in consultation with the CBP Communications Office. Determine the following:
-What materials would be helpful for the landowners to serve as ambassadors with their neighbors?
-What concerns have shoreline management contractors had to work through with landowners on their projects? What has worked? What hasn't worked? What materials would be useful to them?

As part of this step, the project advisory team will assist in providing key contacts and making connections to facilitate the gathering of permitting information for MD, VA, and DE.

Step 3 Deliverables:

- Develop a list of potential case studies (6 to 10, word).
- Provide video interviews completed with shoreline landowners similar to what is found on https://www.wetlandswork.org (video files)
- Provide a list of potential materials that would be helpful for landowners to have in order to serve as ambassadors within their communities. Additionally, this list should contain concerns from shoreline management contractors, their lessons learned and useful materials that they could use to promote natural and nature-based methods for shorelines (word).
- Develop a database or inventory of existing MD, VA, and DE training and outreach for shoreline property owners and shoreline management contractors (excel).
- Provide recommendations for additional product development, design and/or media channels for de-armoring (word).
- For MD, VA, and DE, develop a simple guidance document and visual products (infographics) of process and contacts for state-specific shoreline permitting processes. Include visual products, simple infographic(s) or visual product(s) that explain the steps required in each of the three states to obtain a shoreline permit (pdf or ppt).
- Summary or annotated table with web links of funding sources/grant opportunities for living shoreline projects to offset the cost of nature-based shoreline projects in MD, VA, and DE (excel).

Step 4: 6/1/2021 to 10/31/2021
Develop a detailed communication and outreach plan for this project using results from Steps 1 through 3 above, including the Literature Review, database of materials and interviews with ambassadors and shoreline management contractors, the proposed communications products from the *Shoreline Implementation Plan* and/or any additional products. The deliverables should consider messaging in simple, easy-to-understand language and provide a format that could be easily replicated online or in print. Additionally, the messages should be tailored per the guidance in the CBP local engagement strategy https://www.chesapeakebay.net/channel_files/37484/cbp_local_engagement_strategy.pdf and the Shoreline report (*Survey Results of the Shoreline Management Barriers and Benefits Report*: https://cbtrust.org/wp-content/uploads/16788_Final-Survey-Results-%E2%80%93-Shoreline-Management-Barriers-and-Benefits.pdf).

Step 4 Deliverables:

- Provide recommendations for additional product development, design, and/or media channels for de-armoring (word)
- Using the information previously collected, create a database that identifies any additional shoreline ambassadors and local organizations assisting with engagement and the type of shoreline project (excel).

- Develop a draft communications and outreach plan – including all content and draft deliverables for the project advisory team feedback. Materials should consider any content or information requested by landowners and shoreline management contractors in their interviews (word).

Step 5: 11/1/2020 to 11/31/2021
The final communications and outreach plan should be submitted that addresses comments and feedback from the project advisory team. The project advisory team will review the list of proposed communications products and select which should be implemented. The winning bidder will then develop/finalize the content and deliverables. The project should be completed by December 2021.

Step 5 Deliverables:
- Final communication and outreach plan (pdf)
- Creation of engagement campaigns/materials for targeted outreach that include a collection of best practices to effectively engage residents in the three variety of shoreline tiers (no armor, upland vegetation, living shorelines) (pdf):
    - Key messages that will resonate with targeted audience(s) of 3-tiered approach identified through the *Shoreline Implementation Plan.*
    - Final messaging that explains benefits of alternative, nature-based approaches, engineering, effectiveness and cost comparisons of nature-based versus traditional/hardened approaches.
    - Detailed final communications and outreach plan on how to use these communications materials.
    - Web content for the CBP website (the winning bidder is developing content only, not creating a website).

Stakeholder Participants: Throughout the project, the contractor will be engaged with a project advisory team through regular meetings. The project advisory team should include staff from the Chesapeake Bay Program, state agency representatives from the Maryland Department of Natural Resources (MD DNR), Virginia Institute of Marine Science (VIMS), Delaware Department of Natural Resources and Environmental Control, and other contacts determined by the project advisory team lead.

This project shall also take into account existing efforts within the Chesapeake Bay Program, including projects funded by the Sustainable Fisheries Goal Implementation Team, Communications Workgroup, and local government engagement efforts by the Local Leadership Workgroup.

The winning bidder will also be expected to consult with other external partners that will be part of the project advisory team (initially coordinated and setup by the CBP) and may include: National Oceanic and Atmospheric Administration, Smithsonian Environmental Research Center, Maryland Department of the Environment, Department of Natural Resources and Environmental Control, Virginia Department of Environmental Quality, the Virginia Marine Resources Commission, Elizabeth River Project, Restore America's Estuaries, United States Army Corps of Engineers and others.

Summary of Deliverables (see details in Steps 1 through 5):

Major deliverables include the following:
- Draft and final communications and outreach plan (pdf)
- Development of draft and final outreach content and deliverables, including engagement campaigns and messaging materials (pdf)

Other deliverables include the following (as defined in detail in Steps 1 through 4):

- Database of all references and resources reviewed and collected (excel).
- List of shoreline sites for implementation of outreach strategies (excel).
- Database of ambassadors, engaged local organizations, and shoreline management contractors (excel).
- Shoreline and permitting information from MD, DE and VA, as well as existing programs, trainings and outreach campaigns; a visual guidance document of the state-specific shoreline permitting processes; and web links of funding sources for implementation of living shoreline projects (word, excel).
- List of potential case studies in each state (word)
- Video interviews with shoreline landowners (video files)
- Web content for the CBP website (the winning bidder is developing content only, not creating a website).

Quality Assurance Project Plan (QAPP) Requirement: A QAPP will not be required for this Scope.

Qualifications of Applicant:

- Marketing Experience: Knowledge of communication best practices and experience with community-based social marketing, behavior change campaigns, and product development.
- Digital Marketing Experience: Expertise with website design and development, digital advertising and social media campaign design and development.
- Graphic Design Experience: Brand development and print and digital collateral development.
- Ability to compile and synthesize information from various sources into easily accessible end-product.
- Preferred: Experience in shoreline permitting process for coastal Maryland, Virginia, and Delaware.

SECTION II – BUDGET AND ADDITIONAL SERVICES

Amount Available: It is anticipated that as a result of this procurement action, one contract will be awarded for Scopes #2 and #3. Each successful bidder for each Scope may be engaged in one additional phase of work through this procurement action

Additional Services. The Contract Officer may request ancillary or additional services within the capacity of the Contractor as may be useful or necessary in the interests of the Trust and the Project for the above Scope of Work.

ADD/DEDUCT: The Trust reserves the right to add or remove items from the base bid proposal during the contract and modify or adjust scope of work and payment as needed.

SECTION III - PROPOSAL FORMAT AND SUBMISSION INFORMATION

3.1 Principal Solicitation Officer and Issuing Office:

Contract Officer:	Sarah T. Koser
Telephone Number:	410-974-2941, ext. 106
E-Mail	skoser@cbtrust.org
Address:	Chesapeake Bay Trust

108 Severn Avenue
Annapolis, MD 21403

The sole point of contact for the purpose of this RFP is the Contract Officer.

3.2 **Prospective Offerors**: An "Offeror" is a person/entity submitting a proposal in response to this RFP.

3.3 **Cancellation; Discretion of Contract Officer**: This RFP may be canceled in whole or in part and any proposal may be rejected in whole or in part at the discretion of the Contract Officer. In addition, the Contract Officer has the right to negotiate separately with any Offeror in any manner which will best serve the interests of the Trust. The Contract Officer may waive any mandatory condition or minimum qualification if the Contract Officer determines that such action is in the best interest of the Trust.

3.4 **Submission Instructions/Proposal Closing Date**: Offerors must submit proposals using our Online Application System, located at: https://www.grantrequest.com/SID_1520?SA=SNA&FID=35071 no later than **4:00 p.m.** on **Monday, October 19, 2020** (the "**Closing Date**"). Requests for extensions will not be granted, late applications will not be accepted, and the online funding opportunity will close promptly at 4:00 pm. **Offerors are strongly encouraged to submit at least a few days prior to the deadline** given potential for high website traffic on the due date. The Trust cannot guarantee availability of Online Application System technical assistance on the deadline date. If email confirmation of submission is not received within two business days, please contact the Principal Solicitation Officer listed in Section 3.1.

Proposals are irrevocable for 90 days following the Closing Date.

3.5 **Proposal Format**: A project narrative and a project budget are required, as described below.

a. Project Narrative. You will be asked to submit a narrative. Each proposal (i.e., a submission in response to each Scope of Work) must include responses to items 1 through 7 in a concise (≤ 5 page) description. Items 8 and 9 may be addressed outside of the 5-page limit and may be attached as additional pages. All material must be submitted as one electronic file. Organize your proposal as follows:

1. Names of individuals providing the services and number of years of experience in such areas.
2. Scope number for which the Offeror is bidding (Scope #2 or Scope #3).
3. The individual's proposal for how to address the elements of the Scope of Work and required outcomes described in the deliverables section.
4. Response to the qualifications section: a description of the experience to provide services in the topics described in the bidder qualifications section
5. Names, phone numbers, and email addresses of three references.
6. A deliverables schedule using the table format below, including details for each deliverable format (e.g., excel spreadsheet). A template is provided for the first deliverable. Add rows for additional deliverables and include total cost in the last row. **Awards will be managed as firm-fixed-price contracts and both scopes will need to be completed at the latest by December 31, 2021.**

Table X. Project deliverables and timeline.			
Report # and Reporting Period	**Project Deliverables**	**Date of Delivery**	**Amount**
Report #1: X/X/20XX to X/X/20XX	The deliverables include: • (add name of deliverables here, along with format of each deliverable)	X/X/20XX	$
Report #1: X/X/20XX to X/X/20XX	The deliverables include: • (add name of deliverables here, along with format of each deliverable)	X/X/20XX	$

7. Description of subcontracting process, if applicable. For contacts only, if a subcontractor is proposed for services over $3,000, describe how you will or have met the below criteria for subcontractual work as described in items “8a” or “8b” (whichever is appropriate for your project, and is consistent with Section 3.8):
   a) If the subcontractor has already been identified by attaining at least three estimates or through a competitive bid process and using good faith efforts to reach MBE/WBE/DBE firms, describe the process and results, e.g., describe the bid process used to obtain bids, including length of time the bid was open for responses, a description of the selection process/criteria used to select the winning bidder (e.g., low bidder, qualifications, criteria, etc.), and reason(s) for selection of the winning contractor (lowest qualified bid, etc.).
   b) If the subcontractor has not already been identified describe the process you will take to secure the subcontractor, e.g., describe the bid process to be used to obtain bids, including length of time the bid was open for responses, a description of the selection process/criteria used to select the winning bidder (e.g., low bidder, qualifications, criteria, etc.), and reason(s) for selection of the winning contractor (lowest qualified bid, etc.).

8. The resume or CV of the individual(s) providing the service.
9. Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities

b. Project Budget: You will be asked to upload your budget using the “Application Budget” worksheet of the Chesapeake Bay Trust’s Financial Management Spreadsheet (FMS), an excel file template. The template is available in the online application and can be found by visiting www.cbtrust.org/forms where you can also watch a video with instructions on how to complete the FMS. The budget is a spreadsheet that is uploaded separately into the online application. For your budget request:

   1. The body of work described in your proposal should be able to be accomplished with the resources requested in your budget; be as detailed as possible.
   2. The Offeror shall submit a budget including total number of hours and hourly rate of compensation for the services to be performed during the term of the contract broken down by direct rate, benefit rate, indirect rate, profit, and direct expenses; any additional costs required to complete the project; and total compensation. Under this program, food and beverage costs will not be supported.

3. **If your proposed indirect rate is higher than 10% of the direct costs and your proposal is selected for funding, you will be required to provide the Negotiated Indirect Cost Rate Agreement (NICRA) documentation**.
4. Matching/leveraged resources are encouraged but not required. Indicate whether each match entry is applied for, pledged, or in-hand. Indicate in the narrative whether your organization has requested financial support from any other sources for the project not listed as match in the budget submitted.
5. Use the "Additional Budget Justification" section in the online application to justify and explain costs. Budgets that are detailed, justified, and itemized are ideal.
6. The proposed rates of compensation will be irrevocable for a period of 90 days from the Closing Date, or if modified during negotiations, for a period of 90 days from the date such modified rates are proposed by the Offeror.

3.6 Professional Liability Insurance: The Offeror shall agree to maintain in full force and effect during the term of the Contract usual and customary amounts of liability insurance coverage in connection with the performance or failure to perform services under the Contract. Proof of professional liability insurance coverage by the Offeror will be required prior to entering into a Contract with the Trust.

3.7 Eligible Organizations: No entity may enter into a Contract with the Trust under this funding opportunity if the entity is listed in www.sam.gov as debarred, suspended, or otherwise excluded and unless the entity has provided its DUNS (Dun & Bradstreet) number to the Trust. You will be asked to submit your DUNS number in the online application form.

3.8 Subcontracting Opportunities and Procurement: This solicitation will result in one "contract" per Scope of Work. The Offeror should specify the intent to procure subcontracting services and demonstrate compliance with federal procurement guidelines for all subcontracting services between $3,000 and $150,000, including:

a. Obtain three estimates for subcontracted work or
b. Obtain subcontracted services through a competitive bid process.

For all subcontracted work, the Offeror shall be able to demonstrate that Good Faith Efforts were used to engage minority/disadvantaged/women/small business enterprises (MBE/DBE/WBE/SBE) by reaching out to MBE/DBE/WBE/SBE firms to obtain estimates or bids. The following websites may be helpful in identifying MBE/DBE/WBE/SBE firms in states/districts within the Chesapeake Bay Watershed:

DC	https://dslbd.secure.force.com/public/
DE	https://deldotcivilrights.dbesystem.com/FrontEnd/searchcertifieddirectory.asp
MD	https://mbe.mdot.maryland.gov/directory/
NY	https://ny.newnycontracts.com/frontend/searchcertifieddirectory.asp?
PA	http://www.dgs.internet.state.pa.us/suppliersearch
VA	https://www.sbsd.virginia.gov/directory/
WV	http://apps.sos.wv.gov/business/corporations/searchadvanced.aspx

All subcontractors must be verified by checking at www.sam.gov to ensure that they have not been suspended, debarred, excluded, or disqualified to do work with federal government resources.

SECTION IV - EVALUATION PROCEDURE

4.1 Qualifying Proposals: The Contract Officer will review each proposal for compliance with the minimum qualifications set forth in "Offeror's Minimum Qualifications."

4.2 Deviations and Negotiation: The Contract Officer shall have the sole right to determine whether any deviation from the requirements of this RFP is substantial in nature, and the Contract Officer may reject non-conforming proposals. In addition, the Contract Officer may waive minor irregularities in proposals, allow an Offeror to correct minor irregularities, and negotiate with responsible Offerors in any manner deemed necessary or desirable to serve the best interests of the Project.

4.3 Evaluation: Proposals shall be evaluated by a review committee composed of technical experts and facilitated by the Contract Officer. Evaluation will be made on the basis of the evaluation criteria discussed below and may include any oral presentation that may be required by the Contract Officer, through a recommendation by the technical review committee, at his or her discretion. The Contract Officer reserves the right to recommend an Offeror for contract award based upon the Offeror's proposal without oral presentations or further discussion. However, the Contract Officer may engage in further discussion if he or she determines that it might be beneficial. In such case, the Contract Officer will notify those responsible Offerors with whom further discussion is desired. In addition, the Contract Officer may permit qualified Offerors to revise their proposals by submitting "best and final" offers.

4.4 Evaluation Considerations: Proposals and any oral presentation by Offerors who meet the minimum qualifications requested will be evaluated by the technical review committee on the basis of the following criteria:

a. Proposed Team (Specific Individual(s) Responsible for Performance of contract). Evaluation of the qualifications, reputation, and compatibility with needs of the Trust and the Project of the individual or individuals who will perform the contract.
b. Proposed Approach. Evaluation of the work to be performed to accomplish the goals outlined in the Scopes of Work.
c. Experience of Offeror. Evaluation of the quality and quantity of the Offeror's experience and expertise in the areas proposed, supported by references.
d. Capacity. Evaluation of the Offeror’s ability and commitment to meet timeline for the Project.
e. Price and Hours. Hourly rate, number of hours to be devoted to the project, and indirect rate. Budget line items and associated costs per line item must: a) support the scope of work and b) be appropriate and cost-effective. Ensure compliance with federal procurement guidelines (federal funds will support this work), including Title 2 CFR 200 and ensure that all subcontractual work was or will be secured by attaining at least three estimates or by using a competitive bid process and that Good Faith Efforts to engage MBE/DBE/WBE/SBE firms have been documented. Cash and in-kind match are not required but leveraging funds to make a project more robust is encouraged.

SECTION V: OTHER INFORMATION

5.1 Disclosure: Proposals submitted in response to this RFP may be provided to government agencies and be subject to disclosure pursuant to the provisions of the Access to Public Records Act of the State Government Article of the Annotated Code of Maryland (the "Public Information Act") or equivalent for your area. Offerors must specifically identify those portions of their proposals, if any, which they deem to contain confidential or proprietary information and must provide justification why such materials should not, upon request, be disclosed by the State under the Public Information Act.

5.2 Quality Assurance Project Plan: One of the Scopes of Work (Scope #2) will require a Quality Assurance Project Plan ("QAPP"). General guidance on QAPP's can be found on the EPA QAPP website: https://www.epa.gov/osa/elements-quality-assurance-project-plan-qapp-collecting-identifying-and-evaluating-existing. If data originates from sources other than federal reports and peer reviewed journals, a statement on data quality suitability will be required in the final report. When submitting a proposal for a scope of work that requires a QAPP, the Offeror should understand and account for any costs associated with completing this component of the work.

5.3 Expenses: The Trust and the Contract Officer are not responsible for any direct or indirect expenses that an Offeror may incur in preparing and submitting a proposal, participating in the evaluation process, or in consequence of this solicitation process for any reason.

5.4 Acceptance of Terms and Conditions: By submitting a proposal in response to this RFP:

a. the Offeror accepts all of the terms and conditions set forth in this RFP;
b. the Offeror, if selected for award, agrees that it will comply with all federal, State, and local laws applicable to its activities and obligations under the contract;
c. the Offeror shall be deemed to represent that it is not in arrears in the payment of any obligation due and owing the United States Government or the State or any department or unit thereof, including, without limitation, the payment of taxes and employee benefits, and, if selected for award, that it shall not become so in arrears during the term of the contract; and
d. the Offeror, acknowledges that they are compliant with federal employment and non-discrimination laws and have not been debarred, convicted, charged or had civil judgment rendered against them for fraud or related offense by any government agency (federal, State, or local) or been terminated for cause or default by any government agency (federal, State, or local).

5.5 Minority Business Enterprise (MBE) Program, the Disadvantaged Business Enterprise (DBE) Program, Women Business Enterprise (WBE), and Small Business Enterprise (SBE) Program Participation: This RFP encourages the participation of MBE/DBE/WBE/SBE firms (members of a group as defined in the State Finance and Procurement Article of the Annotated Code of Maryland (the "Procurement Article"), Section 14-301(f)(i)(ii)). The Trust encourages MBE/DBE/WBE/SBE firms who meet the qualifications to respond to this RFP.

5.6 Parties to the Contract: The contract to be entered into as a result of this RFP (the "Contract") shall be between the successful Offeror (the "Contractor") and the Trust and may be subject to EPA approval prior to Contract award.

5.7 Contract Documents. The contract shall include the following documents: this RFP, the Proposal (to the extent not inconsistent with the RFP or the contract), and the contract. In the event of an inconsistency, the Contract shall have priority over the other documents and specific conditions of the contract shall have priority over General Conditions.

5.8 Contract Term. The contract term shall commence as of a date to be specified in the Contract and, unless sooner terminated in accordance with the contract , shall end when all work authorized under the contract has been successfully completed by the project end date, unless the contract is renewed or extended at the sole option of the Contract Officer.

5.9 Billing Procedures and Compensation.

a. Method: The contract to be entered into as a result of this RFP will not exceed the small procurement threshold fixed at 41 U.S.C. 403 (11) (currently $150,000). The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and EPA. These may entail monthly reporting of time and eligible expenses or may be based upon satisfactory completion of benchmark tasks.
b. Records: The Contractor(s) shall submit invoices in a form acceptable to the Contract Officer and maintain records relating to the costs and expenses incurred by the Contractor(s) in the performance of the contract for a period of three years from the date of final Project payment under the contract.

5.10 Certification. The Offeror shall certify that, to the best of its knowledge, the price information submitted is accurate, complete, and correct as of the Closing Date, and if negotiations are conducted as of the date of "best and final offer."

5.11 Branding. All products (outreach materials, events) will be branded with the US EPA and Chesapeake Bay Trust logos.

APPENDIX A: DESCRIPTION OF THE SCOPE OF WORK SECTIONS

Goal Implementation Team (GIT)	This section indicates the Goal Implementation Team **(**GIT) that is presenting the scope of work for the RFP.
Purpose and Outcomes	This section provides the purpose of the work and the expected outcomes of the work as well as the background information and context for applicants.
Maximum Request	This section identifies the maximum request amount allowed for the scope of work.
Project Steps and Timeline	This section outlines the specific steps and proposed timeline of work that should be accounted for by the applicant. The applicant should also account for and provide detail regarding any additional steps or work that may be undertaken to deliver the final products as listed in the "Deliverables" section of the table for that scope of work. Additional project steps and extended timelines may be added throughout the project as agreed upon by the chosen Contractor, the GIT team, the Chesapeake Bay Program (CPB), and the Chesapeake Bay Trust (Trust).
Stakeholder Participants	This section lists the project participants that the Applicant will need to engage throughout the project to meet the deliverables of that scope of work.
Deliverables	This section outlines the specific final products that will need to be submitted and approved by the GIT and Trust teams in order to successfully meet the terms of the contract. Additional deliverables may be added throughout the project as agreed upon by the Awardee, the GIT team, the CPB, and the Trust.
QAPP (Quality Assurance Project Plan) Requirement	This section identifies if there is a need for a Quality Assurance Project Plan (QAPP). General guidance on QAPP's can be found on the Environmental Protection Agency (EPA) QAPP website: https://www.epa.gov/osa/elements-quality-assurance-project-plan-qapp-collecting-identifying-and-evaluating-existing. If data originates from sources other than federal reports and peer reviewed journals, a statement on data quality suitability will be required in the final report. When submitting a proposal for a scope of work that requires a QAPP, the applicant should understand and account for any costs associated with completing this component of the work. Additional information about QAPP's can be found in the following documents: 1. *EPA Requirements for Quality Assurance Project Plans*, QA/R-5, March 2001 *2. Guidance for Quality Assurance Project Plans*, QA/G-5, December 2002 (http://www.epa.gov/quality/qs-docs/g5-final.pdf) In some cases when secondary data is used, a QAPP is required. Guidance for developing a QAPP for secondary data can be found at https://www.epa.gov/quality/quality-assurance-project-plan-requirements-secondary-data-research-projects. If data originates from sources other than federal reports and peer reviewed journals, a statement on data quality suitability will be required in the final report.
Qualifications of Applicant	This section outlines the experience required by the Applicant's personnel assigned to perform under the Award.