



***DEVELOPMENT OF A HIGH-LEVEL RESILIENCE PLAN FOR THE
POCOMOKE SOUND REGION***

REQUEST FOR PROPOSAL

SEPTEMBER 2023

CONFIDENTIAL

Disclose and distribute solely to employees of The Nature Conservancy having a need to know
and to potential vendors' employees with a need to know

1. GENERAL ADMINISTRATIVE PROVISIONS

1.1. Statement of Purpose

The Nature Conservancy ("TNC") is issuing this Request for Proposals ("RFP") for consulting services. The work will result in a High-Level Plan for the Pocomoke Sound region (the "Pocomoke Plan") that will outline a path toward increasing habitat and community resilience. The consultant will identify, assess, and integrate existing projects in the Pocomoke region as a precursor to development of a cohesive plan for the landscape. The High-Level Plan will set a framework for how existing projects could feed into a landscape-scale plan, including options for how existing and new partners could collaborate to develop and implement that plan. Our goal is for the High-Level Plan to identify a path forward for collaboration and action to address resilience in the Pocomoke Sound region. Later phases of this work could add further detail to the framework to create a full landscape-scale plan and implement it. A description of the Pocomoke Sound region and detailed scope of work is provided as Exhibit A.

Funding for the High-Level Plan is being provided by the Environmental Protection Agency through the Chesapeake Bay Trust, and the successful bidder will be subject to all relevant Federal and State terms and conditions pertaining to such funds (see Section 2.1: Attachments).

THIS IS NOT AN ORDER.

TNC is a District of Columbia, USA, non-profit corporation with its principal place of business in Arlington, Virginia, USA. TNC has offices across the United States and in over 79 countries and territories around the world.

Since 1951, The Nature Conservancy has been working with communities, businesses and people like you to protect more than 125 million acres of land and 5,000 miles of rivers worldwide. We also operate more than 100 marine conservation projects globally. Our mission is to conserve the lands and waters on which all life depends. Our vision is a world where the diversity of life thrives, and people act to conserve nature for its own sake and its ability to fulfill our needs and enrich our lives. Please see www.nature.org for more details on what the Conservancy does and where we work.

1.2. TNC's Procurement Process

Procurement activities will be conducted in a nondiscriminatory manner with fair treatment given to all consultants/firms. TNC reserves the right to reject any and all offers for any reason whatsoever, to waive technicalities, and to pursue purchasing in a manner that is in the best interest of the organization.

Proposals will be evaluated based on the following criteria:

- (1) The background, education and experience of the party responding to this RFP (each a "Consultant") in providing similar services elsewhere and the quality of services performed.
- (2) The Consultant's responsiveness and compliance with the RFP requirements and conditions.

- (3) The Consultant's ability, capacity and skill to fully and satisfactorily provide the services required in this RFP.
- (4) Prioritization of nature-based solutions in strategies where possible.
- (5) The timeliness and work load capability of the Consultant to provide the services in a timely fashion within an agreed upon budget.
- (6) A detailed budget itemizing the costs for services and related expenses, including profit listed as a separate line item.

1.3. TNC's Obligations

TNC incurs no obligation or liability whatsoever by reason of issuance of this RFP or action by anyone relative thereto.

1.4. Consultant's Obligations

Consultant must analyze and respond to all sections of this RFP providing sufficient information to allow TNC to evaluate the Proposal. Consultant, by submitting its Proposal, agrees that any costs incurred by the Consultant in responding to this RFP are to be borne by Consultant and may not be billed to TNC.

Consultant's proposal must include all of the information requested in the RFP or clearly state where the information resides. If TNC has any confusion or difficulty in retrieving the required information from a Consultant's proposal, it may result in such proposal to be disqualified.

Consultant may not have the ability to resubmit their proposal to TNC.

TNC requests firm fixed pricing for the proposal. *If a particular entity is chosen as an award winner and any additional costs are presented at the time of agreement negotiations or implementation, TNC shall have the right to reject that entity as the contract winner.*

Consultant shall not use the names, logos, images or any data or results arising from the anticipated contract for advertising without TNC's prior written consent.

1.5. Submission Requirements

1.5.1. Submission of Proposal

All responses to this RFP shall be sent as a PDF or Word document via email to the below contact. Top candidates may be asked for an interview that may include a presentation.

1.5.2. Address and email for Consultant's Submission of Proposal

**The Nature Conservancy
Volgenau Virginia Coast Reserve
P.O. Box 158
11332 Brownsville Road
Nassawadox, Virginia 23413**

**Email: susan.bates@tnc.org
Phone: 757-414-9229**

1.5.3. Critical Dates

(1) Proposal deadline to TNC	October 15, 2023
(2) Proposal evaluation	October 16-31, 2023
(4) Final selection of awardee	November 1, 2023
(5) Contract negotiation with awardee	Begins November 1, 2023

Any question about this RFP must be submitted no later than October 1, 2023 to the TNC staff person identified above.

TNC will use its best efforts to answer questions by October 8, 2023.

Answers may be shared by e-mail with all potential bidders. Consultant understands and agrees that it has a duty to inquire about and clarify any RFP questions that the Consultant does not fully understand or believes may be interpreted in more than one way. TNC, however, is not required to answer all questions that are not pertinent to the RFP or are considered to be TNC's proprietary information.

1.6. Restricted Communications

It is the policy of TNC to avoid situations which (1) place it in a position where its judgment may be biased; (2) create an appearance of conflict of interest with respect to rendering an impartial, fair, technically sound, and objective decision prior to selection; or (3) give an unfair competitive advantage to competing Consultants. Therefore, to ensure an ethical evaluation process, all inquiries or other communications regarding this RFP shall be exclusively directed to the person and location specified in Article 1.5.2 of this RFP. Consultants are hereby expressly instructed not to otherwise communicate with anyone other than the TNC staff person identified above regarding this RFP. This prohibition is also applicable to the Consultant's affiliates, officers, employees, agents, consultants, and subcontractors.

1.7. Disposition of Proposals

All material submitted in response to this RFP will become the property of TNC and may be returned only at the option of TNC. Successful and unsuccessful bidders will be notified in writing. TNC shall not be obligated to detail or disclose any of the results of the evaluation.

1.8. Contractual Commitment of Proposal

The contents of submitted Proposals will be considered obligations of the successful Consultant. No information should be submitted that is not intended to be incorporated into the Proposal and any contract that may result from such Proposal. If there is any inconsistency between the terms herein and any of the other contract documents, the terms in the other contract documents shall prevail.

1.9. Confidentiality

Any data, documentation or other business information furnished by or disclosed to the Consultant shall be deemed the property of TNC and must be returned to the TNC upon request.

1.10. **Conflict of Interest Disclosures**

It is the policy of TNC to identify actual, potential or perceived conflicts of interest in any situation in which TNC has a significant business interest. To assist TNC in complying with this policy, we request that all individuals and/or organizations that will be involved in a proposed transaction with TNC complete our Conflict of Interest Inquiry Form. This requirement relates to people who will be working, directly or indirectly, to respond to this RFP, as well as may be doing the resultant work if the Consultant receives the contract.

Please complete the attached Conflict of Interest Inquiry Form (Attachment 2.1.1) and send with your RFP response.

The information will be kept confidential and given out only on a "need to know" basis.

2. ADDITIONAL INFORMATION

2.1. **Consultant's Structure**

Please provide a description of the organization's structure and the names and experience of key individuals. Provide their names, title, location, telephone number, and email.

2.2. **Subcontracting**

Any subcontractors must be identified along with the defined work they will perform. TNC will not refuse a proposal based on the use of subcontractors but does retain the right to refuse the subcontractors selected. The Consultant shall remain solely responsible for all subcontracted work. Describe your rationale for using subcontractors.

2.3. **References**

TNC requires Consultant to provide at least five (5) references with contact name and phone number. TNC shall have permission to contact each reference directly.

2.4. **TNC is a non-profit organization**

We strive to minimize administrative costs to ensure that maximum dollars go to our mission. If the Consultant can aid in our efforts by a donation or special pricing, it would be greatly appreciated.

2.5. **Work Plan**

The consultant will design a work plan to address the scope of work and specific tasks outlined in Exhibit A.

2.6. **Codes**

The Consultant will refer to and abide by applicable building and construction codes and regulations for all Maryland and Virginia counties included in the project.

2.1 Attachments

The following documents will be provided with the RFP.

2.1.1 The Nature Conservancy's Conflict of Interest Inquiry Form

2.1.2 The Nature Conservancy's Standard Contract for Services Draft

Exhibit A

Project Location Background

The Pocomoke Sound and its surrounding lands (Figure 1) are a confluence of culturally and ecologically significant land- and waterscapes, spanning both Maryland and Virginia. The Sound holds one of the Chesapeake Bay's healthiest and most productive oyster habitats, supporting historic watermen communities on both sides of the Sound. The Sound is embraced by protected lands – Cedar Island Wildlife Management Area (WMA), Pocomoke Sound WMA, Saxis WMA, Irish Grove Sanctuary – that serve as vital habitat for vulnerable species, such as the saltmarsh sparrow, valued recreational landscapes, supporting activities such as hunting, birdwatching, boating, and fishing, and important storm surge buffers for adjacent communities. Stretching out from the Sound are climate resilient marsh migration corridors (Figure 2) that have been individually identified as priority lands by the Maryland Department of Natural Resources, Audubon, U.S. Fish and Wildlife Service, and the Delmarva Recreation and Conservation Network (Figure 3). On either side of the Sound sit climate justice communities – Crisfield, MD and Saxis, VA – each with their own rich and historically-significant watermen traditions.

The Pocomoke Sound faces an uncertain future as the land subsides, waters rise, and flooding and erosion degrade and re-shape the region's socio-ecological landscapes. Sea level in the Chesapeake Bay region is rising faster than the global average, and the rate is increasing. Coastal habitats are projected to be lost at an alarming rate, and rural communities, such as Crisfield and Saxis, are particularly vulnerable to the impacts of sea level rise due to limited adaptive capacity and access to adaptation resources. Extreme high tides frequently overwhelm roadways, causing children to miss school and interrupting the flow of commerce. As sea levels rise in the coming decades, these impacts will worsen, further burdening these communities.

The Pocomoke Sound region is transforming. Without a landscape-scale and unified strategy for adaptation, the Pocomoke Sound region stands to lose invaluable ecological and cultural resources. Together, through a cross-state, multi-organization/sector, socio-ecologically focused initiative, we could shift the region's future toward vibrancy.

Long-term Project Goals

Federal, state, and local governments and partner organizations are beginning to proactively plan for the anticipated impacts of a rising sea level. The Nature Conservancy proposes bringing these complementary efforts together to develop a unified, landscape-scale vision for climate adaptation in the Pocomoke Sound landscape. This cross-state initiative would aim to leverage existing investments and synthesize the values of the local communities with projected climatic changes to work toward a more resilient and vibrant Pocomoke Sound region.

Key initiative activities for the overall (long-term) project could include:

- Supporting the expansion of local adaptive capacity via coalition building between rural towns (e.g., Crisfield, MD; Saxis, VA), creation of new local government positions to lead climate adaptation planning, and trainings on how to use available tools (e.g., NOAA sea level rise viewer, Maryland's Coastal Atlas, and TNC's Virginia Eastern Shore Coastal Resilience Tool) to inform climate adaptation planning
- Anthropologic research and community engagement to define community resilience goals (e.g., economic development, flood safe/affordable housing, access to nature, youth development) in the context of flood and sea level rise impacts to inform restoration and landscape planning
- Assessment of fish habitat and ecosystem health as well as potential restoration measures to address current and future vulnerability

- Development of models (e.g., hydrodynamic/storm models, bay-wide water quality and circulation models) to inform restoration and landscape planning as well as adaptation and resilience
- Hosting inclusive and interactive design workshops to identify and generate nature-based, flood adaptation, habitat regeneration, and social resiliency strategies that integrate community values and ecological functionality in the landscape
- Implementation of restoration projects and monitoring of their effectiveness on the health of the environment and community resilience
- Career discovery, science communication, and public art programming to strengthen and support the development of social cohesion and community capacity
- Prioritize land protection strategies through acquisition or conservation easements

Ideally, these activities will be led and supported by partners from federal, state, and local government, regional and local non-profits, academic institutions, and, importantly, local community organizations and individuals. A goal of this work is to unite technical and local expertise in an inclusive and open format that supports community empowerment and ownership of the future of the Pocomoke Sound region. Further, by uniting habitat and community resilience goals across organizations, this initiative could result in transformational habitat restoration that preserves habitat health and associated ecosystem services in the future, alongside a shifting built environment.

Scope of Work

This RFP seeks proposals for Phase I of this landscape-scale habitat and community resilience project for the Pocomoke Sound region. We have defined three phases for the overall project -- Phase I: Project Scoping, Phase II: Developing a landscape-scale plan, and Phase III: Project implementation.

Project scoping will involve defining the project footprint and its relevant characteristics, an assessment of existing habitat restoration projects and partners, a preliminary desktop analysis of habitat restoration potential, mapping of potential project partners as well as mapping of relevant regulatory agencies, and suggested organizational structure for the continuation of the project in the subsequent phases. We anticipate Phase I to span December 2023 – July 2024.

Specific Tasks

(1) *Define the project boundaries*

Determine geographic features (i.e., watershed, habitat, etc.) and communities that may be impacted by current or future flooding as well as those features and communities that could negatively impact the Pocomoke Sound (i.e., water quality, habitat degradation).

(2) *Assess existing habitat restoration projects and partners*

List/map/categorize existing efforts related to natural habitat restoration, management and protection, including partners and funding, in the Pocomoke Sound region.

(3) *Assess existing community capacity and vulnerability*

Conduct a social, economic and cultural assessment of existing communities that includes but is not limited to: population characteristics, infrastructure, economic activity, and social vulnerability.

(4) *Identify potential habitat restoration activities*

Determine potential focus areas for different restoration activities including but not limited to: living shorelines, fish, oyster, and seagrass habitat restoration, and land protection for marsh migration. Conduct a desktop analysis to illustrate the benefits of these restoration projects.

(5) *Characterize community engagement needs*

Determine the communities that should be involved in the creation of this landscape plan and outline potential engagement activities or actions those communities could implement.

(6) *Determine project partners*

Based on results from items 2-4, determine what state, federal, university, or other partners need to be engaged for each suggested activity. Flag projects needing partners from both MD and VA.

Exhibit B

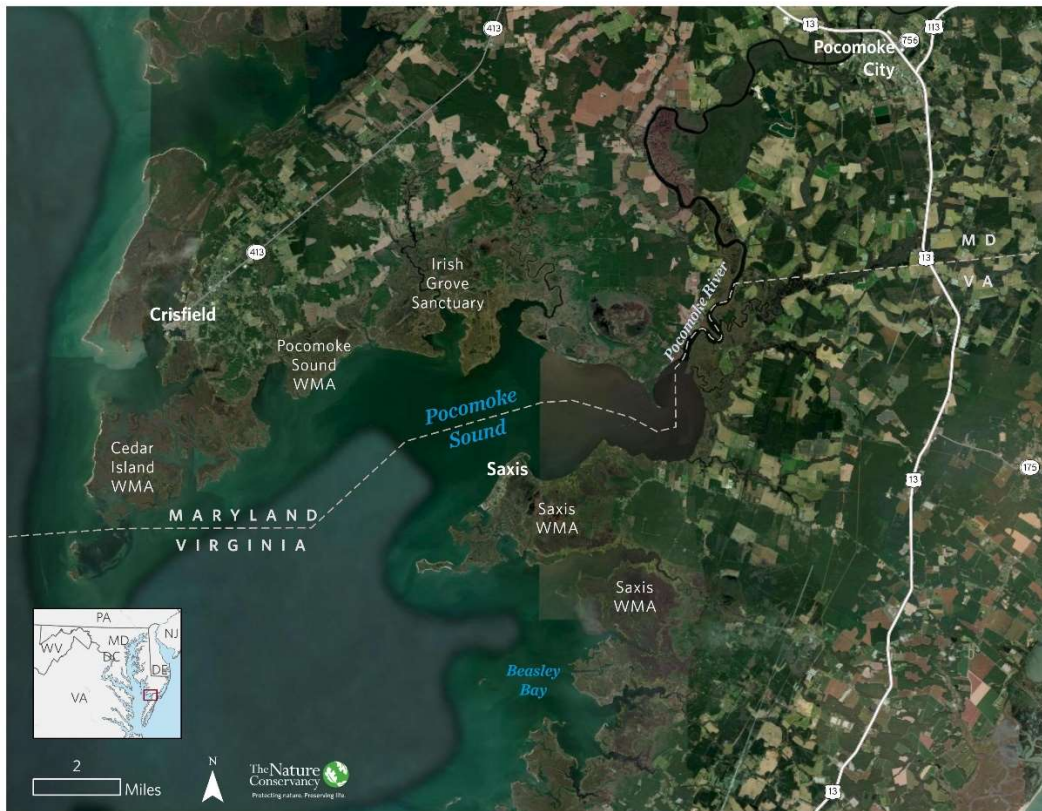


Figure 1: Map of the Pocomoke Sound and surrounding land area with Wildlife Management Areas denoted.

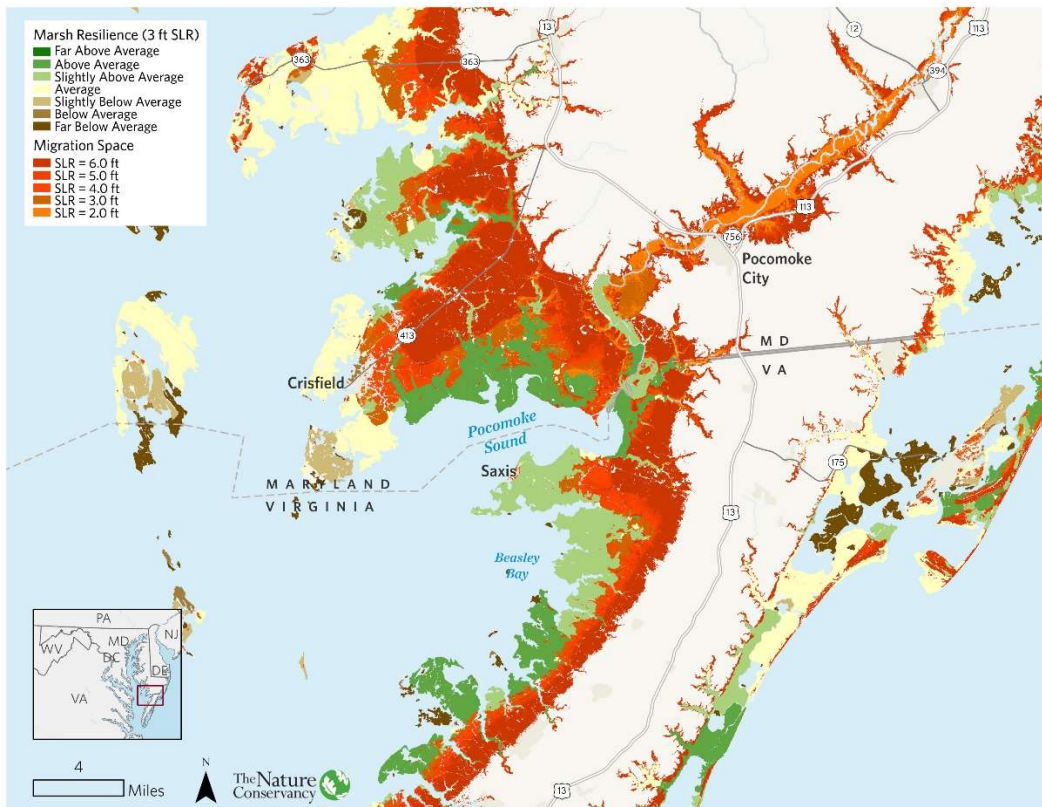


Figure 2: Resilient marsh habitat based on 3-foot SLR (green); marsh migration space for 2-6 feet of SLR (orange).

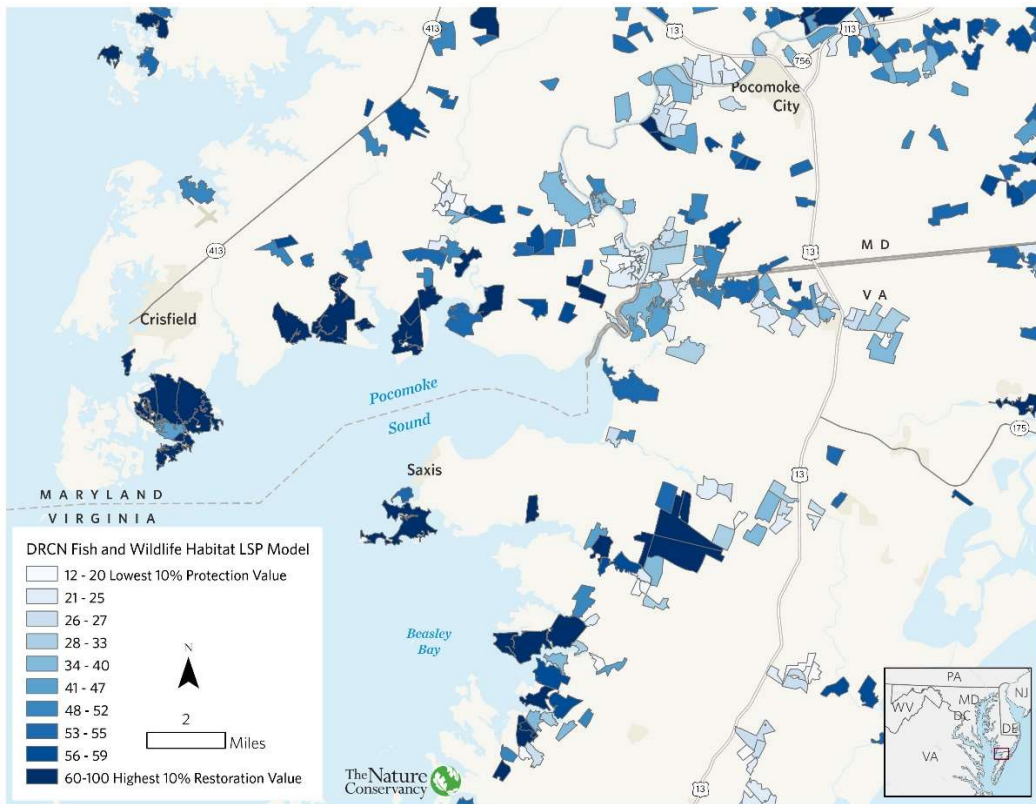


Figure 3: Map of habitat restoration value for fish and wildlife (<https://www.delmarvarcn.org/maps>).

3. VENDOR QUESTIONNAIRE

Please answer each of the following questions in the space provided. If additional space is required, please continue on a separate sheet and attach it to this form.

General Information:

Company Name: _____

Company Address: _____

Contact Name: _____

Phone: _____

Email: _____

Federal ID or SSN #: _____

Years in Business: _____

Customer Information:

Please indicate if you have done business with TNC in the past and provide contact information below.

Financial Information

Indicate your annual sales (in thousands of \$) for the past three (3) years.

What is your company's Dun & Bradstreet Number?

What is your company's Central Contractor Registration (CCR) number? _____

Please provide the following supporting documentation as attachments to this questionnaire:

- a. Income Statement
- b. Balance Sheet
- c. Annual Report (if applicable)
- d. Current Certificate of Insurance

Employee Information

Number of Employees: _____

Service Information

Are there any geographical areas that your company is not able to serve?
_____ YES _____ NO

If yes, please list.

Minority and Women - Owned Business Enterprise

Please indicate below if your firm is at least 51% minority or women owned, controlled and operated, classified as a small business, or a labor surplus area firm. Identify the % of minority or women ownership.

Legal

Are there any judgments, suits or claims pending against your firm?
_____ YES _____ NO

If yes, please explain:

Has your firm operated under a different name? (Please provide)

What is the Dun & Bradstreet Number of that firm: _____
What is that firm's Central Contractor Registration (CCR) number? _____