

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONTRACTUAL SERVICES TO PROVIDE OUTREACH AND TECHNICAL ASSISTANCE FOR THE CHESAPEAKE CONSERVATION AND CLIMATE CORPS PROGRAM

Proposal Deadline: November 2nd, 2023 at 4:00pm EST

SECTION I - INTRODUCTION

1.1 **Purpose:** Through this Request for Proposals (RFP), the Chesapeake Bay Trust (Trust) seeks qualified contractors to increase awareness of and engagement in the Trust's Chesapeake Conservation and Climate Corps (Corps) and provide support for eligible young adults through the application process and their potential placement with the Corps.

SECTION II – SCOPE OF WORK and OFFEROR'S MINIMUM QUALIFICATIONS

2.1 **Scope of Work – Introduction:** The Chesapeake Conservation and Climate Corps Program (<https://cbtrust.org/chesapeake-climate-corps/>) is one of the Trust's flagship programs which promotes and protects the environment by providing young adults with opportunities to gain career skills and become more engaged through meaningful community service. The Corps is a one-year term of stipend supported service that places young adults (ages 18-25) with nonprofits or government agencies to work full-time in the environmental field. Throughout the year this program provides young professionals with experience, leadership and professional development training, mentorship, and a support network of young professionals. Positions offered by Host Organizations are in the fields of climate change, environmental restoration, energy conservation, community engagement, environmental education, sustainable agriculture, and forestry. The Trust encourages applications from Host Organizations that are based in and/or partner with communities that are traditionally under-engaged, such as communities of color. The initiative is supported by the Trust; BGE, an Exelon Company; and the state of Maryland.

The Trust is committed to the advancement of diversity, equity, and inclusion in its award-making and environmental work. As a result, the Trust strongly encourages Corps Member applications from under-engaged groups within the environmental movement and, specifically, from young adults from fenceline communities and/or communities disproportionately affected by climate impacts. Through this RFP, the Trust seeks qualified contractors to increase awareness of and engagement in the Corps Program from young adults within these groups.

The Trust anticipates placing approximately 50-55 Corps Members beginning on August 14, 2024 and ending on August 13, 2025. The subsequent cohorts in 2025-26 and 2026-27 will likely have similar participant numbers.

2.2 Scope of Work – Maximum Bid and Timeline:

- Maximum Bid: Bids not to exceed \$6,000
- Timeline:
 - Deliverable A must be completed by February 22nd, 2024.

- Deliverable B must be completed by the Chesapeake Conservation and Climate Corps Member application deadline, March 7th, 2024.
- Deliverable C must be completed by the Corps Member Ranking Form deadline, May 23rd, 2024.
- Contingent upon funding availability and contractual performance, the timeline may be extended through a contract amendment to support up to an additional 2 years of work. The Trust will notify the contractor by the end of the period of performance if additional services in subsequent years will be requested as part of this contract.

2.3 **Scope of Work – Description & Deliverables:**

Deliverable A: Member Applicant Outreach for the Chesapeake Conservation and Climate Corps Program

The selected contractor will have meaningful connections with the key audiences as defined in section 2.1. The contractor will advertise the Chesapeake Conservation and Climate Corps Program to these key audiences and individuals who may be eligible to receive technical assistance to apply to the program. The methods to be used by successful Offerors can include a variety of practices, and the methodologies chosen should be matched to the audience and justified in the proposal. Example methods may include, but are not limited to:

- Virtual convening/meeting platforms (e.g. Zoom, Google Meet, etc.) or in-person workshops to advertise the program and provide outreach for the key audience;
- Email communications or listservs;
- Phone calls;
- Social media; and/or
- Traditional media such as radio or television targeted to the key audience.

The selected contractor will translate the Trust’s goals into language best received by the proposed audience(s) where appropriate and will have appropriate experience working with young adults in the career development field. “Appropriate experience” is demonstrated by a history of successfully connecting young adults to career development opportunities in the last three years. **The specific deliverables for this portion of the scope of work include:**

1. Completion of outreach and engagement efforts to advertise the Trust’s Chesapeake Conservation and Climate Corps Program (<https://cbtrust.org/chesapeake-climate-corps/>) to at least eight to ten (8-10) young (ages 18-25) people of color or from key audiences in section 2.1.
2. A final list of five (5) individuals who meet the eligibility requirements to apply to the Trust’s Chesapeake Conservation and Climate Corps Program who will receive technical assistance to apply for the program.
3. Introductory meeting(s) with the five (5) eligible, individuals **prior** to starting the application process. The meetings will be coordinated by the contractor and may be virtual or in-person, and must include the Contractor, the Trust Point of Contact, and the eligible individuals. The meetings may be held for each of the individuals or in a group.
4. A written report with invoice including:
 - a. The names and contact information (email address and/or phone number) of the 8-10 young adults initially identified and of the 5 young adults who will receive technical assistance to apply to the Corps;

- b. Written evaluation of the method(s) used; and
- c. Description of lessons learned including challenges and roadblocks and how they were addressed to ensure success.

Deliverable B: Member Application Submission Technical Assistance for Chesapeake Conservation and Climate Corps Program

The selected contractor will work with the young adults identified through Deliverable A to provide support throughout the application process including the submission of the Chesapeake Conservation and Climate Corps Member online application form located at <https://cbtrust.org/chesapeake-climate-corps/apply/> (to be opened in December 2023), development of required narrative responses, and any other optional application components. **The specific deliverables for this portion of the scope of work include:**

1. Support of five (5) eligible individuals in reading and understanding the Chesapeake Conservation and Climate Corps Member Application Package and Corps Member Responsibilities document if placed.
2. Support of five (5) eligible individuals to successfully, and robustly, answer the required “Narrative Questions” and to prepare any other materials for the application. Although the contractor is responsible for supporting the completion of responses to the required “Narrative Questions,” all responses must be the original thought and writing of the individual, not the contractor.
3. Assist five (5) eligible individuals in navigating the Trust online application portal, with the final result being the successful submission of five complete applications*.
4. A written report with invoice including:
 - a. Written evaluation of the method(s) used;
 - b. Description of lessons learned including challenges and roadblocks and how they were addressed to ensure success; and
 - c. A comprehensive list of all individuals identified through the outreach process, if not already included in the Deliverable A report, that may be interested in technical assistance later but were not ready to apply at this time. This list shall include contact information for individuals identified.

*A complete Corps application is defined as an application that meets the criteria and requirements as outlined in the Chesapeake Conservation and Climate Corps Member Application Package.

Deliverable C: Support for Member Applicants through the Corps Matching Phase

The selected contractor will provide technical assistance and support for young adults supported through Deliverable B, by ensuring attendance at the Corps Job Fair (typically held in April) and completion of the Corps Member Ranking Form by the deadline, May 23rd, 2024. Information about the Job Fair and Ranking Form can be found at <https://cbtrust.org/chesapeake-climate-corps/apply/>. **The specific deliverables for this portion of the scope of work include:**

1. Ensuring the attendance of the five (5) individuals (supported through Deliverable B) at the Virtual Corps Job Fair, anticipated in April 2024.
2. Support of five (5) individuals (supported through Deliverable B) in the completion and successful submission of the Corps Member Ranking Form. The Ranking Form outlines the Corps Member Applicant’s preference of Host Organizations and is used in the Matching Phase to determine the best available Host and Member placements.

3. A written Final Report with final invoice including:
 - a. A summary of Deliverable C;
 - b. Written evaluation of the method(s) used; and
 - c. Description of lessons learned including challenges and roadblocks and how they were addressed to ensure success.

2.4 **Qualifications and expertise:** Offeror's assigned to perform under the Contract should have the following:

- A minimum of three to five years of experience working with or engaging the priority audience;
- Experience with the advertisement methods chosen;
- Demonstrated established relationships with members of the priority audience;
- An organization mission that focuses either on the priority audience or that crosscuts that of the priority audience and natural resources;
- A minimum of three to five years of experience with application writing and mentorship; and
- A minimum of three to five years of experience with, and a proven track record of, successfully assisting applicants in developing career skills and securing professional development opportunities.

The Offeror should be as specific as possible when describing outreach, technical assistance, and support methods to be used. Generally, a scope of work that involves a combination of the strategies above will be more effective than using one strategy. Contractor(s) will have access to resources for the Chesapeake Conservation and Climate Corps program (if needed) to aid in the creation of advertisement materials.

SECTION III – ADDITIONAL SERVICES

3.1 **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 any of the above Scopes of Work.

3.2 **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 IV - PROPOSAL FORMAT AND SUBMISSION INFORMATION

4.1 **Principal Solicitation Officer and Issuing Office:**

Contract Officer:	Hayley Rost
Telephone Number:	410-974-2941 x119
E-Mail	hrost@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.

4.2 **Prospective Offerors:** An "Offeror" is a person or entity that submits a proposal in response to this RFP.

4.3 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 she determines that such action is in the best interest of the Trust.

4.4 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=35756 no later than **4:00 p.m. on November 2nd, 2023** (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 4.1.

Proposals are irrevocable for 90 days following the Closing Date.

4.5 Proposal Format:

Narrative: You will be asked to submit a narrative. Each proposal must include responses to a-d in a concise (≤ 5 pages) description. Items e) and f) may be addressed outside of the 5-page limit and may be attached as additional pages. All material must be submitted in one electronic file.

- a) Names of individuals providing the services and number of years of experience in such areas.
- b) The individual's proposal for how to address the elements of the scope(s) of work and required outcomes described in the services and deliverables section (Section II above).
- c) Response to the qualifications section: a description of the experience to provide services in the topics described above as described in Section II.
- d) Names, phone numbers, and email addresses of three references.
- e) The resume or CV of the individual(s) providing the service.
- f) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

Budget: 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. Use the Application Budget worksheet in the Financial Management Spreadsheet accessible at www.cbtrust.org/forms, and if needed, provide additional justification or explanation as an attachment to the proposal. 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. 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.

4.6 Subcontracting Opportunities: It is assumed this solicitation will result in small procurements that will not provide realistic opportunities for subcontracting, though multiple organizations may apply as a collaborative or partnership with an identified project lead. If, however, an offeror considers

subcontracting of services to be available, they should so specify, and in that case demonstrate compliance with Good Faith Efforts to engage Disadvantaged Business Enterprises.

4.6 **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.

4.7 **Eligible Organizations:** No entity may enter into a contract with the Chesapeake Bay Trust under this funding opportunity unless the entity has provided its DUNS number to the Trust.

SECTION V - EVALUATION PROCEDURE

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

5.2 **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.

5.3 **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.

5.4 **Evaluation Considerations:** Proposals and any oral presentation by Offerors who meet the minimum qualifications set forth in Section II will be evaluated by the technical review committee on the basis of the following factors:

- 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 in Section II.
- 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 and number of hours to be devoted to the project.

SECTION VI: OTHER INFORMATION

6.1 **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"). 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.

6.2 **Expenses:** The Trust and the Contract Officer are not responsible for any direct or indirect expenses which 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.

6.3 **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).

6.4 **Disadvantaged Business Enterprise/Minority Business Enterprise (DBE/MBE) Participation:** This RFP encourages the participation of DBE/MBE 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 DBE/MBE firms who meet the minimum qualifications to respond to this RFP.

6.5 **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.

6.6 **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, unless the Contract is renewed or extended at the sole option of the Contract Officer.

6.7 **Billing Procedures and Compensation:**

- a) **Method:** The Contracts 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. 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 Contracts for a period of three years from the date of final Project payment under the Contracts.

6.8 **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."

6.9 **Branding**: All products (outreach materials, events) will be branded with the Trust logo.