

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

FACILITATOR SERVICES FINANCIAL LITERACY SERIES

SECTION I - INTRODUCTION

1.1 Purpose

The purpose of this Request for Proposals ("RFP") is to develop and deliver a series of financial literacy trainings for Chesapeake Conservation and Climate Corps (Corps) Members.

SECTION II – SERVICES/SCOPES OF WORK and OFFEROR'S MINIMUM QUALIFICATIONS

Maximum bid: Bids not to exceed \$14,500

Timeline: Work must occur between August 1, 2026 and August 1, 2027. Contingent upon funding availability, the timeline may be extended to support an additional two years of facilitator work. The Trust will notify the contractor by the end of the period of performance if additional facilitator services in subsequent years will be requested as part of this contract.

2.1 Scope of Work – Introduction

The Chesapeake Bay Trust (Trust) is a nonprofit, grant-making organization dedicated to improving the bays, streams, rivers, forests, parks, and other natural resources of all our local systems, from the Chesapeake to the Coastal Bays to the Youghiogheny River. As part of these efforts, the Chesapeake Bay Trust is proud to partner with the State of Maryland, BGE an Exelon Company, and the Maryland Department of Service and Civic Innovation to administer the Chesapeake Conservation and Climate Corps (Corps) program (<https://cbtrust.org/chesapeake-climate-corps/>).

The Corps Program is one of the Trust's flagship programs which promotes and protects the environment by providing emerging professionals (young adults ages 18-25) with the opportunity to gain career skills and become more engaged through meaningful community service. The program places young adults with nonprofits organizations and government agencies conducting environmental projects in the state of Maryland for a one-year term of full-time equivalent, stipend-supported service. Throughout the year, Corps Members gain real-world experience, leadership and professional development training, mentorship, and a support network of young environmentalists.

To empower Corps Members with the tools and knowledge to manage their personal finances, the Corps program seeks a facilitator to develop and deliver a series of in-person and virtual Financial Literacy trainings. The training series will be delivered to the approximately 80 Corps Members the Trust anticipates placing in the 17th Corps cohort beginning on August 18th, 2026 and ending on August 17th, 2027. Subsequent cohorts (2027-28 and 2028-29) will likely have similar participant numbers.

2.2 Scope of Work – Deliverables

Offerors must outline in detail their ability to perform in timely fashion the following services:

- Deliverable A – Confirmation of date(s) on which:
 - The first training session will take place. The session will occur in-person for one half-day (4 hours) and focus on providing Corps Members with budgeting tools to manage their Corps annual stipend (\$33,280). The training session will take place toward the beginning of the Corps term in Fall 2026. Due to the size of the cohort, this in-person training session will be delivered to one half of the cohort (~40 individuals) at a time for a total of two, 4-hour sessions on separate dates.
 - The subsequent virtual training sessions will take place. These sessions will occur virtually with the full cohort (~80 Corps Members) and may vary in length (1-2 hours) depending on the topic for a total of 6 hours of virtual training over the course of the Corps term (between Fall 2026 and Summer 2027).

Dates will be determined collaboratively between the Trust and contractor.

- Deliverable B – Design of draft agenda(s) for:
 - The first 4-hour, in-person financial literacy training sessions for Corps Members. The training should focus on short-term tasks and goals such as setting a budget, cash-flow management, building savings, and related financial tools to support Corps Member management of their personal finances during the Corps term.
 - The 6-hours of virtual financial literacy training sessions for Corps Members. These sessions should focus on mid and long-term tasks and goals to achieve financial security, including but not limited to: taxes, credit cards, credit scores, loans, debt management, investment management, etc.

All training sessions (in-person and virtual) should be interactive and use multiple instructional methods. The Trust welcomes the addition of other financial topics that would be beneficial to young professionals entering the environmental field.

- Deliverable C – The contractor will provide final agendas for the 4-hour, in-person sessions and 6-hours of virtual training sessions for Corps Members that incorporates the feedback, and with the approval, of the Trust.
- Deliverable D – The contractor will deliver the in-person and virtual Financial Literacy training sessions to Corps Members. The 4-hour, in-person session will be delivered twice, to one-half of the cohort at a time, and the 6-hours of virtual training sessions will be delivered once to the full cohort.
- Deliverable E – The contractor will provide 4-hours of virtual, private coaching sessions for Corps Members over the course of the term. These sessions will be held individually between the contractor and Corps Members, to serve as an opportunity for Corps Members to ask personal, financial questions and can vary in length at the discretion of the contractor.

a. Qualifications and expertise

Offeror's personnel assigned to perform under the Contract should have the following experience:

- Experience designing and delivering financial literacy training courses for professionals using multiple instructional methods – at least 5 trainings with demonstrated formal curriculum over the past five years – required;
- Experience working with young professionals (18-25 years old) - preferred;

- Demonstrated academic or professional training and education in finance or a related field - preferred; and
- A background working with a diversity of audiences - preferred.

SECTION III – ADDITIONAL SERVICES

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.

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 21401

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://us.grantrequest.com/application.aspx?sid=1520&fid=35735> no later than **4:00 p.m. on Friday, April 17th, 2026** (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 materials 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 2.5,
- 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.

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. Offerors are strongly encouraged to engage Disadvantaged/Minority 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:**
Not-for-profit and for-profit entities are eligible organizations.

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 Documents**: The Contract shall include the following documents: this RFP, the Contractor's 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.

6.7 **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.

6.8 **Billing Procedures and Compensation**:

- a) **Method**. 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.

6.9 **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."

6.10 **Branding**: All products (outreach materials, events) will be branded with Chesapeake Conservation and Climate Corps, Chesapeake Bay Trust, and Maryland Corps/Service Year Option logos.