

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONSULTANT SERVICES DEVELOPMENT AND IMPLEMENTATION OF A DIVERSITY, EQUITY, INCLUSION, AND JUSTICE TRAINING SERIES

SECTION I - INTRODUCTION

1.1 Purpose: The purpose of this Request for Proposals ("RFP") is to solicit services to develop and implement a Diversity, Equity, Inclusion, and Justice (DEIJ) Training Series in partnership with the Chesapeake Bay Funders Network (CBFN) as part of the Capacity Building Initiative. The work to be supported will advance outcomes from the Chesapeake Bay Agreement. The Funding is supplied by the Chesapeake Bay Trust and the Environmental Protection Agency (EPA) Chesapeake Bay Program through the National Fish and Wildlife Foundation.

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

2.1 Scope

Maximum bid: Bids not to exceed \$125,000.

Timeline: Work must be completed by June 1, 2022

a. Scope of Work – Introduction

Many Chesapeake environmental funders have committed to or have expressed interest in advancing racial equity in environmental grant-making and acknowledge that the watershed will not be restored without a broad range of communities investing in and gaining access to the benefits of healthy natural resources. Currently, the composition of the Chesapeake Bay environmental community does not reflect the demographic diversity of the region, though some progress has been made. Many factors drive the under-engagement of various audiences. Some audiences may be under-engaged due to historic and systemic exclusion. For example, information has emerged not just about the exclusion of Black, indigenous, and people of color (BIPOC) communities dating back to the early days of the environmental movement, but also about disturbing connections between some of those perceived as pillars of the environmental movement and discriminatory social and political philosophies.

Advancing diversity, equity, inclusion, and justice efforts among regional non-profits and funders is important for several reasons. Given the breadth of the natural resource restoration challenges, the participation level necessary for solutions will only be reached if more communities in the watershed are brought into the effort and natural resource stewards are developed from wider audiences. Second, given that healthy natural resources improve lives in various ways, populations who are not engaged will continue to be at a disadvantage. Humans have capacity to improve natural resources, and natural resources have the capacity to improve human life.

To accomplish this goal, the funding and non-government organization (NGO) community need significant training and support. The Trust, CBFN, and other partners have assessed these needs and have concurrently been piloting a variety of strategies to address them, including a broad assessment of the community's understanding and adoption of DEIJ practices and the development of an associated DEIJ guide to assist regional non-profits and funders in increasing DEIJ efforts. These efforts have shown the potential for shifts to occur but have not yet taken the form of a robust and extended learning series, including a space for informed discussion about needs and opportunities and for funders and NGOs to forge collaborative actions that advance racial equity in the region's water movement. While individual NGOs and funders can and should pursue tailored organizational assessments and training opportunities, research has shown that third-party training using multiple instruction methods, including facilitated discussion and information sharing among different groups can significantly improve outcomes among training participants. Considering this information, the intent of this training series is to develop a shared understanding among funder and NGO leaders of the history, systems, and practices that contribute to inequities in the clean water movement and increase access to resources, technical assistance, and facilitated peer to peer sessions to develop near term concrete plans of action that advance DEIJ. This RFP calls for the development and implementation of such a training series.

b. Scope of Work – Deliverables.

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

- Deliverable A – Written summary of lessons learned from other funders network's DEIJ training efforts for their shared grantee communities.
- Deliverable B – Draft year-long DEIJ Training Series topics, methods, and goals for review and refinement. Where relevant and appropriate, training topics and formats should be tailored for regional non-profits and funders with a focus on the environment, including clear knowledge objectives for both audiences for each of the proposed trainings within the series. The training series should clearly leverage lessons learned from other similar efforts as well as existing data collected through the 2018-2019 regional DEIJ assessment. Specific criteria to guide selection of participants as well as the number of participants will be developed with the contractor. For planning purposes, the following can be used to estimate costs: number of funder participants = 15-25; number of NGO participants = 20-50.
- Deliverable C – Final year-long DEIJ Training Series topics, methods, knowledge objectives, and timeline.
- Deliverable D - Draft pre- and post-evaluation of training series, demonstrating increased knowledge as a direct result of trainings offered.
- Deliverable E – Draft virtual training modules, including resource documents and power-point slides, some of which can be shared publicly at the conclusion of the year on the Trust and CBFN's website.
- Deliverable F – Written final report summarizing the outcomes of the training series, including:
 - pre- and post-evaluation survey outcomes,

- final edited versions of recorded virtual trainings (all identifying information from participants should be edited out of final recordings),
- lessons learned from training implementation,
- recommendations for next steps and/or other actions to increase implementation of the existing Diversity, Equity, Inclusion, and Justice in Action Guide.

c. Qualifications and expertise

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

- A. A minimum of six years of experience designing and leading DEIJ trainings (required);
- B. Demonstrated experience designing trainings that use multiple instruction methods both in-person and through web-based platforms (required);
- C. Demonstrated experience designing trainings that leverage best practices in pursuit of individual and organizational change; in particular, designing trainings that link to existing or developing organizational goals (required);
- D. Experience working with non-profits and philanthropic institutions (required);
- E. Trainers who identify from a diversity of racial and cultural backgrounds (preferred).

SECTION III – ADDITIONAL SERVICES

Additional Services. This RFP is part of an ongoing initiative with the Trust and CBFN to advance DEIJ and the Contract Officer may seek additional services to support implementation of actions developed during the training series or other related needs. 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: Kacey Wetzel
Telephone Number: 410-974-2941 x104
E-Mail: kwetzel@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=35341

no later than **4:00 p.m. on April 1st** (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 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. 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.

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, a Proposer 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 based on 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 based on 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 and may be subject to EPA approval prior to Contract award.

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 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 and Environmental Protection Agency Chesapeake Bay Program through the National Fish and Wildlife Foundation. 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."

6.9 **Branding**: All products (outreach materials, events) will be branded with the Chesapeake Bay Funders Network, Environmental Protection Agency Chesapeake Bay Program, National Fish and Wildlife Foundation, and Trust logos.