CHESAPEAKE BAY TRUST

REQUEST FOR PROPOSALS

CONSULTANT SERVICES
TECHNICAL ASSISTANCE TO SUPPORT CHESAPEAKE BAY PROGRAM GOALS AND OUTCOMES—Water Quality

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SECTION I – INTRODUCTION AND SCOPE OF WORK

1.1 Purpose

The purpose of this Request for Proposals (RFP) is to invite entities experienced in various aspects of tree canopy, urban forestry, tree nursery supply, data review and development, climate resilience, environmental communication and information sharing, 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 (EPA) as part of the Chesapeake Bay Program (CBP) Goal Implementation Team (GIT) Funding Program. The work to be supported will advance specific outcomes from the *2014 Chesapeake Bay Watershed Agreement* (and Amendment, dated 2022) that have been identified as top priorities to address.

This RFP includes one "project" that is described as Scope of Work #4. The individual scope of work is listed below, and scope details and qualifications of Offerors are described in more detail in Section 1.2. A maximum bid amount is listed for the project scope. Cost will be a factor in the evaluation of bids as described in Section IV.

The Trust has been designated to receive federal funds from the United States EPA as part of the GIT

Funding Program to advance specific outcomes from the *2014 Chesapeake Bay Watershed Agreement*. Awards under this RFP 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 United States EPA, Catalog of Federal Domestic Assistance (CFDA) # 66.466, through the Cooperative Agreement (Federal Award Identification Number) 96374201 dated 8/2/2022.

The source of the GIT Funding Program 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 or put the work out for competitive bid (e.g., in a RFP) for subcontracted services over $10,000 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 Services/Scope of Work and Offeror's Minimum Qualifications

This section provides a description of the Scope of Work, maximum bid amount, project outcomes, project steps and timeline, expected deliverables, and minimum qualifications. A general description of the Scope of Work sections is included in Appendix A. *Please note that this scope was originally advertised in March 2023 and is being readvertised in this RFP with adjusted content.*

Scope of Work #4: Addressing Regional Tree Supply Challenges & Opportunities

GIT	Water Quality GIT
Maximum Bid Amount	$70,000
Purpose and Outcomes	Ambitious tree planting goals are included in the Chesapeake Bay Watershed Agreement (Tree Canopy: https://www.chesapeakeprogress.com/abundant-life/tree-canopy, Riparian Forest Buffers: https://www.chesapeakeprogress.com/abundant-life/forest-buffers) and the jurisdiction Watershed Implementation Plans (WIPs) for meeting Total Maximum Daily Load (TMDL) requirements, with current levels of tree planting lagging behind targets and far outpaced by tree canopy losses at the watershed scale. For example, the seven Bay jurisdiction WIPs (collectively) call for over 72,000 acres of urban tree BMPs by 2025, while only 11,857 acres have been reported as planted as of 2021. In addition to water quality related tree targets, climate resilience constitutes a newer policy driver for state goals, such as Maryland's Climate Solutions Now Act passed in 2021, which calls for 5 million additional trees to be planted by 2031, with 500,000 of these targeted to underserved urban areas. One of the important limiting factors on achieving these tree planting goals is having an adequate supply of high quality, diverse, and climate resilient seedlings and larger stock trees to plant. The few State tree nurseries that exist play a critical role in helping to meet seedling supply but there are a number of limitations and challenges that need to be addressed in order to effectively plan for and scale up supply for all the different entities that need trees to meet the planting goals. Private or non-profit nursery operations are essential to supplement state nursery supply and to provide the larger stock and variety needed in urban settings. New climate and infrastructure-related funding at the federal level could be directed to bolstering tree supply, but a well-informed, coordinated, and equitable approach is needed to produce the best outcomes from such opportunities. This project will lay the groundwork for such a strategic approach by: 1) completing a rapid assessment of the current network of tree suppliers serving the seven jurisdictions of the

	Chesapeake Bay watershed, including key gaps/issues to address; 2) convening one virtual Scaling Up Chesapeake Tree Supply Forum that will gather insights from state forestry agencies, nursery producers, and tree planting organizations working in both rural and urban/underserved community settings; and 3) providing an actionable set of strategies and recommendations based on Forum findings and "best practice" examples gleaned from across the country. Outcomes of this project include: • Assess current capacity of regional public and private tree nurseries in the seven Chesapeake watershed jurisdictions to meet current and future tree planting needs, accounting for needs of under resourced, low canopy communities • Identify key needs and strategies for meeting future demand and addressing the issues in scaling up supply such as equity and workforce development through a coordinated, proactive approach • Provide a set of recommended actions for CBP partners aimed at bolstering the supply of climate resilient trees for urban and rural contexts
Project Steps and Timeline	**Step 1: 11/15/2023 to 12/31/2023, Project Steering Committee Input & Rapid Assessment Workplan** The GIT Technical Lead will provide a contact/invite list for the steering committee, which will include key expert and stakeholder perspectives (e.g., state forestry agencies, nursery organizations and associations, other major planting organizations). The contractor will coordinate a project initiation meeting with the GIT Technical Lead and Chesapeake Bay Trust point of contact within a month of receiving award notification to discuss project deliverables, timeline for delivery, and expectations. The contractor will meet with the GIT Technical Lead and prepare for a kick-off meeting with the steering committee to get preliminary input on key issues, list of stakeholders/informants and interview/focus group questions for Rapid Assessment, and overall project design. The GIT Technical Lead will schedule and organize all aspects of the steering committee meeting. Based on steering committee input, the contractor will develop a draft Rapid Assessment workplan, including information gathering plan/timeline, spreadsheet of contacts for interviews/focus groups, and interview/focus group questions. The contractor will hold a virtual meeting with GIT Technical Lead to discuss feedback and finalize workplan. <u>Deliverables for Step 1 include</u>: • Agenda and detailed meeting notes from project initiation meeting (Word) • Detailed meeting notes from kick-off steering committee meeting (Word) • Spreadsheet of potential stakeholder contacts to engage in rapid assessment and/or Forum from steering committee input (Excel) • Draft interview/focus group questions (Word) • Draft (Word) and final (PDF) Rapid Assessment workplan **Step 2: 1/1/2024 to 4/15/2024, Rapid Assessment of Chesapeake tree nursery supply network**

Project Steps and Timeline (continued)	The contractor will conduct approximately 15 to 20 interviews and/or focus groups designed to reach representatives (e.g., nursery organizations and associations, state forestry agencies, other major planting organizations) from each of the seven jurisdictions and a range of stake holder perspectives based on steering committee's guidance to define the network of players currently involved in supplying trees and seedlings in the watershed, develop demand estimates based on state targets, and gather input on key issues to address in scaling up supply, including a focus on equity and workforce development. Based on information gathering, the contractor will continue adding to/refining the spreadsheet of stakeholders to invite to the Forum and possible presenters. The contractor will develop a draft report on Rapid Assessment findings, organized to inform Forum design options in Step 3. Deliverables for Step 2 include: • Detailed notes compiled from all interviews and focus groups (for project record, internal reference by GIT Technical Lead) (Word) • Expanded spreadsheet of potential stakeholder contacts and speakers to engage in the Forum (approximately 100 participants for the session based on steering committee input and information gathering findings) (Excel) • Draft Rapid Assessment findings report (PDF) **Step 3: 4/16/2024 to 7/15/2024, Plan and Deliver Scaling up Chesapeake Tree Supply Forum** The GIT Technical Lead will meet with the contractor to plan the agenda for the steering committee call and develop draft Forum Design (e.g., slide-deck) that will be used to get steering committee input on key aspects of the forum (objectives, structure/agenda, timing, etc.). *Note: The forum is envisioned as a six-hour virtual event focused on nurseries that provide larger caliper trees for urban tree plantings and stakeholder groups that rely on those trees. The target is to engage 100 participants for this session. The design of the forum may be adjusted based on stakeholder feedback during the planning phase of the project.* The contractor will present their findings from the Rapid Assessment and get structured input on Forum Design (late April/early May). The GIT Technical Lead will help schedule the meeting with the contractor and steering committee. The contractor will refine and finalize Forum Design based on input from the steering committee and GIT Technical Lead. The contractor will generate and send email invites and digital flyers to the invite list. The contractor also will manage all aspects of Forum registration, in consultation with the GIT Technical Lead. The contractor will organize all Forum content (prepare briefing materials and slides, schedule and prepare speakers, plan interactive discussion sessions, provide logistic/facilitation support, etc.). The contractor will deliver a virtual forum (success by reaching target number and diversity of attendees as set by project steering committee), with results captured through recorded presentations, discussion notes, participant feedback, and PowerPoints that will be later

Project Steps and Timeline (continued)	accessible online (e.g., Chesapeake Tree Canopy Network website). After the forum is completed, the contractor will submit a detailed outline for the Forum Report to the GIT Technical Lead for Step 4. <u>Deliverables for Step 3 include</u>: • Final Forum Design (includes agenda, session topics, final list of speakers, plan for briefing materials) (PDF) • Participants invite and attendance lists (Excel) • Project steering committee meeting and detailed notes (Word) • One-day (6-hour) virtual Forum event • High quality Forum materials that are accessible online to interested stakeholders via GIT Technical Lead/Chesapeake Tree Canopy Network website (promotional materials, briefing materials, presentations, discussion notes, and participant feedback) • Forum Report outline (Word) **Step 4: 7/16/2024 to 10/15/2024, Develop Project Report including Forum Report & Solution-Pathway Case Studies** Based on themes and findings from Rapid Assessment and Forum, the contractor will select 10 to 20 draft options for solution-pathways for possible research and development into 1-page case studies; potential case studies include innovative nursery strategies found in locations around the country related to scaling up supply, meeting equity and workforce development needs, innovative procurement models, enhancing seed supply and climate resilience of stock, etc. The contractor will meet with GIT Technical Lead for input on Forum Report content and draft case study workplan that will be presented to the steering committee. The GIT Technical Lead will schedule and meet virtually with the contractor and the steering committee to review Forum findings and get input on Forum Report outline and case study selection/workplan. Based on steering committee and GIT Technical Lead input, the contractor will research and draft five to ten solution pathway case studies, pared down from the 10 to 20 draft options presented previously (1 page each). The contractor will develop a draft project report including: 1) Project Overview/Rapid Assessment Findings; 2) Forum Report; and 3) Solution Pathway Case Studies. <u>Deliverables for Step 4 include</u>: • Draft (Word) and final (PDF) case study workplan • Project steering committee meeting and detailed notes (Word) • Draft project report, including: 1) project overview/rapid assessment findings; 2) Forum Report; and 3) Solution Pathway Case Studies (Word) **Step 5: 10/16/2024 to 12/31/2024, Final Report, Recommendations, and Final Webinar** The contractor will develop a draft set of recommended actions that CBP/state leadership and partners should consider pursuing in the next two years based on project findings. Recommendations should include lessons learned from convening the virtual forum and guidance for a future forum that could focus on engaging state nursery and seedling supply stakeholders.

	The contractor will present the draft project report and recommended actions at the November or December 2024 Forestry Workgroup meeting for input before finalizing. The contractor will hold a web meeting with the GIT Technical Lead for input and to finalize the project report and recommendations. The contractor will then create a fact sheet summarizing the project (two pages). The findings of this project are important and the goal (beyond this project scope) is to share these results with all project stakeholders and other interested parties. The GIT Technical Lead may convene a webinar in the future and may ask the contractor to present the findings regarding this scope of work at one (1) webinar planned by the GIT Technical Lead. Deliverables for Step 5 include: • Draft (Word) and final (PDF) recommendations • Final project report (PDF) • Fact sheet summarizing project (PowerPoint) • Present findings of this project at one (1) webinar (PDF)
Stakeholders	• Forestry Workgroup • State Forestry/state nursery leadership • Nursery associations/companies (private sector) • Non-profit tree planting/nursery organizations
Deliverables	1. All Project Steering Committee Meeting Notes (Word) 2. Draft (Word) and final (PDF) Rapid Assessment Workplan and Report 3. Spreadsheet of stakeholder contacts to engage (Excel) 4. Draft interview/focus group questions (Word) 5. Detailed notes compiled from all interviews and focus groups (for project record, internal reference by GIT Technical Lead) (Word) 6. Final forum design documents (PDF) and delivery of one Forum (virtual 6 hour session) 7. Participants invite and attendance lists (Excel) 8. Forum report outline (Word) 9. Draft (Word) and final (PDF) case study workplan 10. Draft (Word) and final (PDF) Project Report, including Overview/Rapid Assessment Findings, Forum Report, and Solution Pathway Case Studies 11. Draft (Word) and final (PDF) recommendations 12. Fact sheet summarizing project (PowerPoint) 13. Present findings of this project at one (1) webinar (PDF)
QAPP Requirement	No, a QAPP is not required.
Qualifications of Bidder	• Experience in organizing effective interactive virtual meetings with multi-faceted agendas; demonstrated skill in guiding stakeholder input processes around policy issues and developing solution pathways and action strategies • Knowledge of innovative funding and policy approaches around forestry/tree planting, nursery supply and workforce development • Excellent communication skills, distilling key information in compelling written reports, oral presentations, briefing materials, etc. • Experience in rapid assessment/gap analysis, interview/focus group methodologies, and case study development

SECTION II – BUDGET AND ADDITIONAL SERVICES

2.1 **Amount Available.** It is anticipated that as a result of this procurement action, one contract will be awarded for each Scope. Each successful bidder for each Scope may be engaged in one additional phase of work through this procurement action. Awards will be managed as firm-fixed-price contracts.

2.2 **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.

2.3 **Add/Deduct.** The Trust reserves the right to add or remove items from the base bid proposal during the contract and modify or adjust the scope of work and payment as needed.

SECTION III - SUBMISSION INFORMATION

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

Contract Officer:	Whitney Vong
Telephone Number:	410-974-2941, ext. 122
E-Mail:	wvong@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 or entity that submits 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. EDT** on **Monday, October 16, 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 p.m. EDT. **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 **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.

3.6 **Eligible Organizations.** No entity may enter into a Contract with the Chesapeake Bay Trust under this funding opportunity if the entity is listed in www.sam.gov as debarred, suspended, or otherwise excluded. You will be required to submit your Unique Entity ID (UEI) number in the online application form. The federal government has transitioned from a DUNS (Dun & Bradstreet) number to a UEI. Entities and/or Contractors that developed or drafted the scope of work content or developed project specifications in this RFP are not eligible to bid on this opportunity to ensure adherence with Federal guidelines, including Title 2 CFR 200 and specifically §200.319 Competition.

3.7 **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 greater than $10,000 and less than $250,000, 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://marylandmdbe.mdbecert.com/
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 https://sam.gov/content/home 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 by Offerors who meet the minimum qualifications set forth in Appendix A will be evaluated by the technical review committee on the basis of the following factors:

a. Proposed Approach. Evaluation of the work to be performed to accomplish the goals outlined in the Scope of Work.
b. 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.
c. Experience of Offeror. Evaluation of the quality and quantity of the Offeror's (and subcontractor'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. Cost Effectiveness/Budget. 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. 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 **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.

5.3 **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).

5.4 **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 minimum qualifications to respond to this RFP.

5.5 **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.

5.6 **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.

5.7 **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 by the project end date, unless the Contract is renewed or extended at the sole option of the Contract Officer.

5.8 **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 $250,000). The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and US 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 Contracts for a period of three years from the date of final Project payment under the Contracts.

5.9 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."

5.10 Branding. All products (outreach materials, events) will be branded with the United States EPA, Chesapeake Bay Program, and Chesapeake Bay Trust logos.

SECTION VI - PROPOSAL FORMAT

6.1 Proposal Format. A project narrative and a project budget are required, as described below.

a. Project Narrative. You will be asked to submit a project narrative. Answer the project narrative questions below and upload the MS Word or PDF file. The project narrative should not exceed five (5) pages of text. You may add photos/graphs, resumes, Letter(s) of Commitment, and other materials to support your project proposal in addition to the project narrative questions and submitted as one file (i.e., combine the project narrative answers with additional materials excluding the budget for submission). There is a file attachment size limit of 1 gig for the entire application. Each proposal (i.e., a submission in response to each Scope of Work) must include responses to items one (1) through seven (7) in a concise description. Organize your Project Narrative as follows:

1. Scope Number and Title: List the scope number and title of your application.

2. Requesting Organization and Individuals Providing the Services:
   i. Describe your organization and experience.
   ii. Provide the names of individuals providing the services and number of years of experience in such areas.

3. Proposed Approach. Your proposal for how to accomplish the goals and outcomes/deliverables for the Scope of Work.

4. Deliverables. Provide 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 two deliverables. Add rows for additional deliverables and include total cost in the last row. **Awards will be managed as firm-fixed-price contracts.**

Table X. Project deliverables and timeline.

Report # and Reporting Period	Project Deliverables	Date of Delivery	Amount
Report #1: MM/DD/20YY to MM/DD/20YY	The deliverables include: • (add name of deliverables here, along with format of each deliverable)	MM/DD/20YY	$

Table X. Project deliverables and timeline.			
Report # and Reporting Period	**Project Deliverables**	**Date of Delivery**	**Amount**
Report #2: MM/DD/20YY to MM/DD/20YY	The deliverables include: • (add name of deliverables here, along with format of each deliverable)	MM/DD/20YY	$

5. Will a subcontractor be used in this Project: Yes or No? If Yes, describe the subcontracting process. If a subcontractor is proposed for services over $10,000, describe how you will or have met the criteria for subcontractual work as described in items “5i” or “5ii” below (whichever is appropriate for your project, and is consistent with Section 3.7 above):
   i. 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 subcontractor (lowest qualified bid, etc.).
   ii. 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 subcontractor (lowest qualified bid, etc.).

6. Qualifications: Respond to the qualifications section in the Scope of Work. Resumes of key personnel should be included in the application package but will not be considered in the Project Narrative’s five-page limit.

7. References: Names, phone numbers, and email addresses of three references.

8. Additional information: 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 can be downloaded from 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 resources requested in your budget should be able to accomplish the body of work described in your proposal; 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, please provide the Negotiated Indirect Cost Rate Agreement (NICRA) documentation in your proposal**.

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.

APPENDIX A: DESCRIPTION OF THE SCOPE OF WORK SECTIONS

The table below presents the description of the scope of work, including but not limited to expected deliverables and minimum qualifications of Bidders. The scope of work is presented in the format below:

Goal Implementation Team (GIT)	This section indicates the Goal Implementation Team (GIT) that is presenting the scope of work for bid.
Maximum Bid Amount	This section identifies the maximum bid amount allowed for the scope of work.
Purpose and Outcomes	This section provides the purpose of the work and the expected outcomes of the work. This section provides background information and context for potential Bidders.
Project Steps and Timeline	This section outlines the specific steps and proposed timeline of work that should be accounted for by the Bidder. The Bidder 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 (CBP), and the Chesapeake Bay Trust (Trust).
Stakeholder / Participants	This section lists the project stakeholders and/or participants that the Bidder will need to engage throughout the project to meet the deliverables of that scope of work.
Deliverables	This section provides an overview of the major deliverables (the final products) that will need to be submitted and approved by the GIT Technical Lead 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 chosen contractor, the GIT team, the CBP, 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 Bidder 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 (https://www.epa.gov/sites/default/files/2016-06/documents/r5-final_0.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/epa-region-3-quality-assurance-project-plans. 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 Bidder	This section outlines the experience required by the Bidder's personnel assigned to perform under the Contract.