



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

1.1 Purpose

The purpose of this Request for Proposals (RFP) is to invite entities experienced in water quality projects 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 as part of the Chesapeake Bay Program (CBP) Goal Implementation Team Project Initiative. The work to be supported will advance specific outcomes from the 2014 Chesapeake Bay Watershed Agreement that have been identified as top priorities to address, and these stretch across all Goal Implementation Teams (GITs) and workgroups.

This RFP includes one “project” that is described as a Scope of Work (Scope #9). The Scope of Work is listed below, and scope details and qualifications of Offerors are described in more detail in the sections that follow. A maximum bid amount is listed for the Scope of Work. Cost will be a factor in evaluation of bids as described in Section IV.

The Trust has been designated to receive federal funds from the United States Environmental Protection Agency (EPA) as part of the CBP GIT Project Initiative to advance specific outcomes from the 2014 Chesapeake Bay Watershed Agreement. Awards under this RFP for Scope #9 will be issued as a “contract.” 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 US EPA (CFDA# 66.466) through the Cooperative Agreement 96341401 dated 5/18/19.

The source of the CBP GIT Project Initiative 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/bids for subcontracted services over \$3,000 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 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.

Scope of Work:

Scope #	FFY20 Scope Title	Maximum Bid Amount	Award Details
Scope of Work 9*	Methods to Integrate Co-Benefits of Toxic Contaminant Reduction into Decision-Making Tools	\$56,000	<u>One contract will be awarded</u>

**This scope was originally advertised in December 2020 and is being readvertised in this RFP with an adjusted scope of work.*

Note, where applicable, reports, data, and deliverable products shall be provided to the GIT technical leads sufficiently in advance of the end of the contract date in order for an effective iterative process to take place before the contract terminates. These materials, depending on the nature of the deliverable, should be provided in draft report form or in the form of a GIT or workgroup summary presentation. This will allow technical leads, GITs, workgroups, and other CBP partners to review, provide comments, ask questions, and get clarification related to the project directly from the awardee; this iterative process allows for feedback to be incorporated into the deliverables/products. This draft review process should be reflected in all RFP responses where applicable; awardee hours should be allocated to the oral presentation of final draft results to the CBP via one webinar. The appropriate CBP lead, in cooperation with the awardee, will determine when that presentation would be most advantageous. Any substantive comments, questions or edits received through this process shall be incorporated into the final deliverable products. Develop a timeline that will account for this iterative process.

1.3 Scope of Work 9: Methods to Integrate Co-Benefits of Toxic Contaminant Reduction into Decision-Making Tools (Maximum Bid Amount: \$56,000)

Goal Implementation Team (GIT): Water Quality

Purpose and Outcomes: Contaminants in urban areas, primarily polychlorinated biphenyls (PCBs) have caused fish consumption advisories and degraded the health of fish. In some areas, a portion of people’s diet depend on consuming locally caught fish that are a risk to eat. State agencies and local governments who manage water quality and recreational fishing need improved information to mitigate toxic contaminants, and information on how they can take advantage of ongoing nutrient and sediment reduction efforts to achieve co-benefits of PCB reduction.

The project will develop methods and provide improved information on the removal efficiencies for PCBs from select urban contaminant Best Management Practices (BMPs). The results would be put into Chesapeake Assessment Scenario Tool or CAST to better quantify toxic contaminant reduction of PCBs.

The findings from the study will provide needed information for improved decision making by states and local governments in the Chesapeake Bay watershed on the co-benefits of selected urban nutrient and sediment practices to reduce contaminants, improve habitat conditions for fisheries, help address local water-quality impairments due to PCBs, and make fish safer to consume by diverse groups in urban areas. The

findings will also further inform the co-benefits of outcomes being addressed by the Chesapeake Bay Program (CBP) Water Quality, Fisheries, and Habitat Goal Teams. The project builds from efforts previously supported by the Toxic Contaminant Workgroup (TCW) of the CBP to assess the Potential Benefits of Nutrient and Sediment Practices to Reduce Toxic Contaminants in the Chesapeake Bay watershed (Schueler and Youngk, 2015; 2016;

https://www.chesapeakebay.net/documents/Final_Report_on_Urban_Toxic_Contaminants.pdf;
https://www.chesapeakebay.net/documents/Final_Report_on_Ag_and_Wastewater_Toxics.pdf).

Despite the exhaustive literature review conducted in urban- and agricultural-dominated land use there was little evidence at that time of published effectiveness of nutrient and sediment practices to remove toxic contaminants, and therefore conclusions were made about probable effective management practices using sediment removal as a surrogate for hydrophobic contaminants (such as PCBs) rather than reporting the direct measurements of contaminant reductions. Additionally, discussions with the CBP modeling team about CAST suggested that without the quantitative information on BMP effectiveness of toxic contaminants, they could not be included into the tool. These issues (lack of BMP effectiveness data and the best way to package research information into decision tools) limits progress on identifying potential co-benefits of nutrient and sediment practices to also reduce toxic contaminants, which is a critical part of the Toxic Contaminant Research Outcome.

There is a new and growing body of information to overcome these limitations for developing co-benefits between nutrient, sediment, and toxic contaminant reduction of PCBs. A workshop hosted by the Chesapeake Bay Program Scientific Technical Advisory Committee (STAC) held in May 2019 (Majcher and others, 2020; <https://www.chesapeake.org/stac/document-library/integrating-science-and-developing-approaches-to-inform-management-for-contaminants-of-concern-in-agricultural-and-urban-settings/>) revealed ongoing advances in the use of stormwater practices for toxic contaminant removal, especially for PCBs, one of the toxic contaminants that drive many fish consumption advisories nationwide. These advances have largely been driven by the implementation of toxic contaminant total maximum daily loads (TMDLs) in urban areas, particularly in the west/northwestern United States. While many of the advances have occurred outside the Chesapeake Bay watershed such as in the San Francisco Bay area and Portland, OR, and Spokane, WA, researchers within the Chesapeake Bay watershed and the Department of Defense have advanced experiences more locally. The new and expanding body of information on the topic provides a timely opportunity to make progress on the toxic contaminant research outcome by identifying a roadmap for inclusion of PCBs in CBP decision tools.

Project Steps and Timeline:

Step 1: 6/15/2021 to 9/15/2021 -Meetings and Associated Minutes

Conduct project kickoff meeting (not to exceed two hours) to discuss project startup and hold periodic (at least quarterly) meetings (not to exceed one hour) to track progress with the GIT Technical project Leads. With input from the GIT Technical Leads and following the kickoff meeting, the contractor shall confirm participation of identified technical advisory committee members and engage CAST and watershed model staff within CBP, and representatives from the Urban Stormwater and Toxic Contaminant Work Groups. The technical advisory committee should meet quarterly to ensure that approaches, information gathered, and findings are consistent with information required for inclusion in CAST and to ensure the output(s) will be useful to stakeholders. Confirm technical advisory committee member list with commitment to participate throughout duration of project (expect up to five, 60 to 90-minute meetings) and record meeting minutes with action items and any decision points and resolution noted from each advisory committee meeting. The technical advisory committee meeting minutes are expected for the

duration of the project and should be included as an appendix to the final summary report.

Step 1 Deliverables:

- Kick-off meeting minutes
- Confirm technical advisory committee member list
- Summary of meeting minutes from technical advisory panel meetings throughout project

Step 2: 6/15/2021 to 9/15/2021 Quality Assurance Project Plan (QAPP)

Conduct pre-meeting with CBP Quality Assurance (QA) Officer to outline needs and requirements for the QAPP. Coordinate with the EPA QA Officer to draft a project-specific QAPP and submit to CBP QA Officer to obtain approval. Write draft QAPP and submit for review; address comments via a response to comments document, revise, and resubmit the QAPP and obtain approval of project QAPP. This requirement is in place since there will be use of environmental data from literature (“secondary data”) in the development of the methods and approaches.

Step 2 Deliverables:

- Draft QAPP and Final (signed) QAPP

Step 3: 6/15/2021 to 9/15/2021 Identification of BMPs in PCB-impaired, urban areas

The CBP staff, in conjunction with the TCW previously identified areas with PCB impairments in the CB watershed that is available at

<http://chesbay.maps.arcgis.com/apps/MapSeries/index.html?appid=704ecbbb9f5943eca87d59b349edf1ab>

In these overlapping urban areas with PCB impairments, the CBP staff will provide the contractor with a summary of the most implemented stormwater BMPs used in urban areas. The contractor and the technical advisory committee will review the findings and decide on a limited list of BMPs for inclusion in the study.

Step 3 Deliverable:

- Develop a listing/table by state of the most implemented or planned BMPs in urban areas with PCB impairments and select an agreed upon number of BMPs for inclusion in the project (minimum 3) based on results of this step and discussion among the contractor, technical leads, and technical advisory committee.

Step 4: 9/15/2021 to 12/15/2021 Case Study Literature Review

Review literature and existing case studies and complete Tasks A through C as part of Step 4:

Step 4, Task A: Review CAST (the tool) for feasibility of including PCBs and identify advantages and disadvantages of its use for this purpose. Work with CAST staff to develop options for including stormwater practices with PCB data (or through the use of surrogate pollutant loads) within the tool. CAST-specific input parameters related to PCB removal efficiencies within the specific BMPs identified in Step 3 above should be summarized. Information gathered should assess ability to utilize CAST for the purpose of co-benefit reduction of PCBs in specific BMPs identified in step 3.

Step 4, Task B: Summarize methods and outcomes of ongoing or completed projects/case studies that assessed PCB reduction in the specific stormwater BMPs identified in Step 3. Information should include the location of the case study, and document how overall results were quantified for reduction assessment of PCBs (e.g., starting and final concentration measured in specific media). Particular attention to the CAST input parameters identified in Task 1 should be considered in the review of the

case studies.

Step 4, Task C: If explicit case studies for PCB removal within the specified BMPs are deemed to be limited or if input parameters needed for CAST are not identified, review the state of the science to assess if surrogates such as sediment can be used to help estimate effectiveness of removal of PCBs in BMPs where direct measurements are not reported. For example, assess information on sediment reduction to determine if it can be used for estimating PCB reduction for selected urban BMPs in CAST.

Step 4 Deliverables:

- Information gathered should identify the CAST elements needed to integrate co-benefit reduction of PCBs, either by direct measurement or through use of a surrogate such as sediment (Task 4A), for the specific BMPs identified in Step 3).
- Case study summaries of quantitative reduction of PCBs in select BMPs, organized by BMP, that include peer-reviewed references, CAST input parameters, estimated effectiveness or removal efficiency and method of determination, and other relevant information (Task 4B)
- Case study summaries of the use of surrogates (such as sediment) to estimate reduction organized by BMP that includes peer-reviewed references, CAST input parameters, estimated effectiveness or removal efficiency and method of determination, and other relevant information (Task 4C).

Step 5: 12/15/2021 to 5/15/2022 Synthesis of PCB Reduction Estimates and proposed approach to incorporate into CAST

Evaluate and synthesize the information from previous steps to choose the best approach of getting PCB reduction information into CAST. This synthesis and proposed approach should be presented and discussed with the GIT Technical leads, the Technical Advisory Committee, and the CBP CAST Team. Data quality criteria should be developed to reflect confidence in the reported removal of contaminants in BMPs for use in the CB watershed (i.e., the Table 1 in the WQGIT's BMP Review Protocol:

https://www.chesapeakebay.net/documents/CBP_BMP_Expert_Panel_Protocol_WQGIT_approved_7.13.15.pdf).

Using the results of the literature review in Step 4, synthesize, develop an approach to adapt CAST for PCB co-benefit quantification. Develop a flow-chart highlighting steps to include for selected PCB BMPs in CAST, highlighting gaps, or uncertainty associated with each BMP, input, or adaptation step. If inputs vary for different BMPs, individual flow charts or tables shall be generated. Example calculations should be provided in Excel to demonstrate how calculations in the steps/flow charts will be executed (including the range of removal, if suggested from synthesis and flow charts). If quantifying reductions is determined to be too uncertain, qualitative reductions (from surrogates, for example) could be explored with the technical advisory panel and GIT Technical Lead agreement/approval.

Step 5 Deliverables:

- Presentation of the results of the literature review and synthesis of case study information (from Step 4) to the GIT Technical Leads, technical advisory committee and to the Watershed Technical Workgroup of the Water Quality Goal Implementation Team to evaluate integration of information into CAST and agree on data quality criteria and confidence estimates.
- Development of an approach using synthesis information, summarized in flowcharts and supported by example calculations in Excel.

Step 6: 5/15/2022 to 7/15/2022 Reporting

Prepare a technical report to document information from the project, culminating with a recommended

road map to include PCBs into CAST and the limitations of the approach, including results from Steps 1 to 6 above. The report should include a summary of the literature review and case studies from previous tasks, and will communicate findings, justification, and approaches to integrate information into CAST. The report audience would be primarily the CBP workgroups and the report will also highlight tangible ways the execution of the recommendations would benefit stakeholders at the state and local level. The report shall include recommendations, lessons learned, barriers, and limitations/caveats to inform future studies that may seek to repeat this approach for other toxic contaminants and/or to explore other tools.

The draft version of the report should be prepared and presented to the GIT Technical Lead and advisory committee and relevant CBP workgroups (including TCW, Watershed Technical Workgroup, Water Quality GIT, and Urban Stormwater Work Group) for comment. Once comments on the draft report are addressed through a response to comments document, the final version for public release of the report shall be submitted. Appendices to the technical report will include a full list of references, the response to comments document, and other non-presentation deliverables such as minutes, and the prepared excel sheets. Complete a joint final presentation of finding to the relevant CBP workgroups including Toxic Contaminants, Watershed Technical Workgroup, and Urban Stormwater Work Groups (either one joint meeting or multiple presentations of the same material).

Step 6 Deliverables:

- Draft Technical Report
- Final Technical Report and presentations of findings, with comments from draft final document (with comments addressed from draft-final document)
- Final presentation to the CBP relevant workgroups (combined meeting of TCW, Watershed Technical Workgroup, and Urban Stormwater Work Groups)

Stakeholder Participants and Technical Advisory Committee:

- Select State government representative(s) responsible for carrying out WIPs for nutrient and sediment reduction and considering co-benefits of toxic contaminants: Representatives from D.C. Department of Energy and Environment including Matt English, Matthew Gallagher, Jonathan Champion, James Dunbar [matthew.english@dc.gov; matthew.gallagher@dc.gov; jonathan.champion@dc.gov; james.dunbar@dc.gov]
- State government representative responsible for addressing toxic contaminant TMDLs Leonard Schugam, Maryland Department of Environment, leonard.schugam@maryland.gov
- Local government representative(s) responsible for implementing local PCB TMDLs: Kimberly Grove, Baltimore City Department of Public Works kimberly.grove@baltimorecity.gov; Wesley Schmidt (or alternate), Baltimore County Department Environmental Sustainability, wschmidt@baltimorecountymd.gov
- CBP Toxic Contaminant Workgroup representative: Greg Allen, US EPA allen.greg@epamail.epa.gov
- Jeremy Hanson, Virginia Tech jchanson@vt.edu
- CBP CAST Team representative: Olivia Devereux, Devereux Consulting olivia@devereuxconsulting.com

Summary of Deliverables (see details in Steps 1 through 6):

- Step 1: Kick-off meeting minutes; Technical advisory committee member list; Summary of meeting minutes from technical advisory committee meetings throughout project.

- Step 2: Draft and Final (signed) QAPP.
- Step 3: Develop listing/table by state of most implemented or planned BMPs in urban areas with PCB impairments.
- Step 4: Task 4A - Tabulate and summarize input parameters required to model PCB reductions from BMPs, and suitability for inclusion in a Bay watershed-wide model Task 4B – Summarize and catalog BMP case studies that include references, with relevant information from location of study, BMP use for TMDL compliance, and other relevant information as informed by the technical advisory committee and literature review; and Task 4C – Summarize where and how surrogate approaches have been used elsewhere for PCB modeling, outline advantages and disadvantages, and qualify error associated with this approach, if possible.
- Step 5: Synthesize information from Step 4 and develop technical requirements for inclusion of PCB reduction in CAST, incorporating feedback from the committee. Requirements should consist of summaries in flowcharts and supported by example calculations in Excel, as needed.
- Step 6: Draft Technical Report; Final Technical Report and response to comments on Draft Report; Final presentation(s) of findings.

Quality Assurance Project Plan (QAPP) Requirement: A QAPP will be required for this Scope due to the use of environmental data from literature (“secondary data”) in the development of the methods and approaches.

Qualifications of Applicant:

Required Qualifications:

- Experience with PCB fate and transport investigations.
- Experience with PCB fate and transport surrogate modeling.
- Familiarity with BMPs (stormwater control measures, minimum control measures, MCMs) common in Chesapeake Bay watershed.

Preferred Qualifications:

- Experience with watershed model and decision tools used by local and state governments, including CAST.
- Experience working with local, regional, or tribal partners within the Chesapeake Bay watershed on issues related to watershed restoration or planning.

SECTION II – BUDGET AND ADDITIONAL SERVICES

Amount Available: It is anticipated that as a result of this procurement action, one contract will be awarded for Scope #9. The successful bidder for the Scope may be engaged in one additional phase of work through this procurement action. **This award will be managed as a firm-fixed-price contract.**

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 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 III - PROPOSAL FORMAT AND SUBMISSION INFORMATION

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

Contract Officer: Sarah T. Koser
Telephone Number: 410-974-2941, ext. 106
E-Mail: skoser@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/entity submitting 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. on Thursday, June 3, 2021** (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 3.1. Proposals are irrevocable for 90 days following the Closing Date.

3.5 **Proposal Format:** A project narrative and a project budget are required, as described below.

- a) **Project Narrative.** You will be asked to submit a narrative. Each proposal (i.e., a submission in response to each Scope of Work) must include responses to items 1 through 7 in a concise (≤ 5 page) description. Items 8 and 9 may be addressed outside of the 5-page limit and may be attached as additional pages. All material must be submitted as one electronic file. Organize your proposal as follows:
1. Names of individuals providing the services and number of years of experience in such areas.
 2. Scope number for which the Offeror is bidding (Scope #9).
 3. The individual's proposal for how to address the elements of the Scope of Work and required outcomes described in the deliverables section.
 4. Response to the qualifications section: a description of the experience to provide services in the topics described in the bidder qualifications section.
 5. Names, phone numbers, and email addresses of three references not affiliated with

your organization.

6. 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. **The Award will be managed as a firm-fixed-price contract.**

Table X. Project deliverables and timeline.				
Report #	Reporting Period	Project Deliverables	Date of Delivery	Amount
1	X/X/20XX to X/X/20XX	The deliverables include: <ul style="list-style-type: none"> • (add name of deliverables here, along with format of each deliverable) 	X/X/20XX	\$
2	X/X/20XX to X/X/20XX	The deliverables include: <ul style="list-style-type: none"> • (add name of deliverables here, along with format of each deliverable) 	X/X/20XX	\$
<i>Add additional rows as necessary</i>				

7. Description of subcontracting process, if applicable. For contracts only, if a subcontractor is proposed for services over \$3,000, describe how you will or have met the below criteria for subcontractual work as described in items “7a” or “7b” (whichever is appropriate for your project, and is consistent with Section 3.8):
 - a) 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 contractor (lowest qualified bid, etc.).
 - b) 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 contractor (lowest qualified bid, etc.).
8. The resume or CV of the individual(s) providing the service.
9. 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 is available in the online application and can be found by visiting 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 be 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, 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.

3.6 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.

3.7 Eligible Organizations: No entity may enter into a contract with the Trust under this funding opportunity if the entity is listed in www.sam.gov as debarred, suspended, or otherwise excluded and unless the entity has provided its DUNS (Dun & Bradstreet) number to the Trust. You will be asked to submit your DUNS number in the online application form. Entities and/or contractors that drafted or prepared 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*.

3.8 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 between \$3,000 and \$150,000, 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://mbe.mdod.maryland.gov/directory/
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 www.sam.gov 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 described in this RFP 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 Scope of Work.
- 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, 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 and ensure that all subcontractual work was or will be secured by attaining at least three estimates or by using a competitive bid process and that Good Faith Efforts to engage MBE/DBE/WBE/SBE firms have been documented. 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 Quality Assurance Project Plan: The Scope of Work (Scope #9) will require a Quality Assurance Project Plan ("QAPP"). General guidance on QAPP's can be found on the 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 Offeror should understand and account for any costs associated with completing this component of the work.

5.3 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.

5.4 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).

5.5 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 qualifications to respond to this RFP.

5.6 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.

5.7 Contract Documents: The contract shall include the following documents: this RFP, the 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.

5.8 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.

5.9 Billing Procedures and Compensation.

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

5.10 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."

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

APPENDIX A: DESCRIPTION OF THE SCOPE OF WORK SECTIONS

<u>Goal Implementation Team (GIT)</u>	This section indicates the Goal Implementation Team (GIT) that is presenting the scope of work for the RFP.
<u>Purpose and Outcomes</u>	This section provides the purpose of the work and the expected outcomes of the work as well as the background information and context for applicants.
<u>Maximum Request</u>	This section identifies the maximum request amount allowed for the scope of work.
<u>Project Steps and Timeline</u>	This section outlines the specific steps and proposed timeline of work that should be accounted for by the applicant. The applicant 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 (CPB), and the Chesapeake Bay Trust (Trust).
<u>Stakeholder Participants</u>	This section lists the project participants that the Applicant will need to engage throughout the project to meet the deliverables of that scope of work.
<u>Deliverables</u>	This section outlines the specific final products that will need to be submitted and approved by the GIT 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 Awardee, the GIT team, the CPB, and the Trust.
<u>QAPP (Quality Assurance Project Plan) Requirement</u>	<p>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 applicant 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:</p> <ol style="list-style-type: none"> 1. <i>EPA Requirements for Quality Assurance Project Plans</i>, QA/R-5, March 2001 2. <i>Guidance for Quality Assurance Project Plans</i>, QA/G-5, December 2002 (http://www.epa.gov/quality/qs-docs/g5-final.pdf) <p>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/quality-assurance-project-plan-requirements-secondary-data-research-projects. 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.</p>
<u>Qualifications of Applicant</u>	This section outlines the experience required by the Applicant’s personnel assigned to perform under the Award.