

## Chesapeake Bay Trust

# REQUEST FOR PROPOSALS

### CONSULTANT SERVICES

## TECHNICAL ASSISTANCE TO SUPPORT CHESAPEAKE BAY PROGRAM GOALS AND OUTCOMES - FISHERIES, HABITAT, STEWARDSHIP, LEADERSHIP, AND CLIMATE

### Table of Contents

Section I: Introduction.....	p. 1
Section II: Additional Services.....	p. 3
Section III: Proposal Format and Submission Information.....	p. 3
Section IV: Evaluation Procedure.....	p. 5
Section V: Other Information.....	p. 6

### SECTION I - INTRODUCTION

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to invite entities experienced in various aspects of fisheries, watershed science and policy, watershed stewardship, climate change, toxics, and other watershed issues to submit proposals to the Chesapeake Bay Trust (“the Trust”). This RFP is for the “Chesapeake Watershed Conservation Finance Intensive Workshop” scope of work. 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. The funding is supplied by the United States Environmental Protection Agency (“EPA”).

This program and RFP includes one (1) project that has one individual scope of work that includes Scope of Work 10: Chesapeake Watershed Conservation Finance Intensive Workshop (Maximum Bid: \$20,500). **This scope of work was originally released in January 2019 and is being re-released in March 2019 with no changes to the content of the scope.** The scope of work is listed below, and scope details and qualifications of Offerors are described in more detail in Appendix A. A maximum bid amount is listed for the project scope. Cost will be a factor in evaluation of bids as described in Section IV.

#### 1.2 Services/Scopes of Work and Offeror’s Minimum Qualifications

Find below the list of the scope of work, expected deliverables, and minimum qualifications of Offerors.

Please note, where applicable, draft reports, data, and deliverable products should be provided to the technical lead sufficiently in advance of the end of the contract date such that an effective iterative process can 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 Goal Implementation Team or workgroup summary presentation. This will allow the technical lead, Goal Implementation Team(s), workgroup(s) and other CBP partner(s) to review, provide comments, ask questions, and get clarification related to the project directly

from the awardee. The draft review process should be reflected in the RFP response 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 should be incorporated into the final deliverable products. Please develop a timeline that will account for this iterative process.

A list of the Scope of Work is provided below with details for each scope of work including the maximum bid and minimum qualifications provided in Appendix A.

**Scope of Work:**

Scope of Work 10: Chesapeake Watershed Conservation Finance Intensive Workshop (Maximum Bid: \$20,500)

**SECTION II – ADDITIONAL SERVICES**

Additional Services. The Contract Officer may request ancillary or additional services within the capacity of the Contractor as may be useful or necessary in the interests of the Trust and the Project for any of the 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 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 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](https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35071) no later than **4:00 p.m. on March 26, 2019** (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 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. You will receive immediate email confirmation upon successful submission of your proposal.

Proposals are irrevocable for 90 days following the Closing Date.

3.5 **Proposal Format:** The proposal (i.e., a submission in response to the Scope of Work) must include responses to a-e in a concise ( $\leq 5$  pages) description. Item f) is a spreadsheet that is uploaded separately into the online application. Items g) and h) may be addressed outside of the 5 page limit and may be attached as additional pages.

- a) Names of individuals providing the services and number of years of experience in such areas
- b) Scope on which the Offeror is bidding: Scopes #10
- c) The individual's proposal for how to address the elements of the Scope of Work and required outcomes described in the deliverables section (in Appendix A)
- d) Response to the qualifications section: a description of the experience to provide services in the topics described above as described in Appendix A
- e) Names, phone numbers, and email addresses of three references
- f) **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](http://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.
- g) The resume or CV of the individual(s) providing the service
- h) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities

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 Chesapeake Bay Trust under this funding opportunity if the entity is listed in [www.sam.gov](http://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.

3.8 **Subcontracting Opportunities and Procurement**: It is assumed this solicitation will result in one small procurement(s) per bid that will not provide realistic opportunities for subcontracting, though multiple organizations may apply as a collaborative or partnership with an identified project lead. If, however, an Offeror considers subcontracting of services to be available, it is assumed that all subcontracting service procurements should be under the threshold of small procurement, which is \$150,000, given the scope of the work and maximum bid amount. 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:

- a) obtain three estimates for subcontracted work and show Good Faith Efforts to engage minority/disadvantaged/women/small business enterprise (MBE/DBE/WBE/SBE) by reaching out to DBE/MBE/WBE/SBE firms to submit estimates/bids, documenting Good Faith Efforts and estimates. The following website may be helpful in identifying firms: <https://mbe.mdot.maryland.gov/> OR
- b) obtain services through a competitive bid, documenting Good Faith Efforts and estimates.

All subcontractors must be verified by checking at [www.sam.gov](http://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 and any oral presentation 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 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 Appendix A.
- 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, indirect rate, and number of hours to be devoted to the project.

## **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**: If the scope of work listed in Appendix A 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 minimum 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.

**5.7 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.

**5.8 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 Contracts to be entered into as a result of this RFP will not exceed the small procurement threshold set by Federal Acquisition Regulation at 48 CFR Subpart 2.1 (Definitions) and in accordance with 41 U.S.C. 1908. 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 no more than once per month but no less than once per quarter 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 two years from the date of final Project payment under the Contracts.

**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 EPA and Chesapeake Bay Trust logos.



## FFY18 Goal Implementation Team Projects APPENDIX A: Scope of Work



### **Overview of Scope of Work**

Find below descriptions of the scope of work, including but not limited to expected deliverables and minimum qualifications of Offerors.

The scope of work is presented in table format with the following sections:

<b><u>Goal Implementation Team (GIT)</u></b>	This section indicates the GIT team that is presenting the scope of work for bid.
<b><u>Purpose and Outcomes</u></b>	This section provides the purpose of the work and the expected outcomes of the work. This section provides background information and context for potential Offerors.
<b><u>Maximum Bid Amount</u></b>	This section identifies the maximum bid amount allowed for the scope of work.
<b><u>Project Steps and Timeline</u></b>	<p>This section outlines the specific steps and proposed timeline of work that should be accounted for by the Offeror. The Offeror 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.</p> <p>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).</p>
<b><u>Stakeholder Participants</u></b>	This section lists the project participants that the Offeror will need to engage throughout the project to meet the deliverables of that scope of work.
<b><u>Deliverables</u></b>	<p>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.</p> <p>Additional deliverables may be added throughout the project as agreed upon by the chosen Contractor, the GIT team, the CPB, and the Trust.</p>
<b><u>QAPP Requirement</u></b>	<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:  <a href="https://www.epa.gov/osa/elements-quality-assurance-project-plan-qapp-collecting-identifying-and-evaluating-existing">https://www.epa.gov/osa/elements-quality-assurance-project-plan-qapp-collecting-identifying-and-evaluating-existing</a>. 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</p>

	<p>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.</p> <p>Additional information about QAPP’s can be found in the following documents:</p> <ol style="list-style-type: none"> <li>1. <i>EPA Requirements for Quality Assurance Project Plans</i>, QA/R-5, March 2001</li> <li>2. <i>Guidance for Quality Assurance Project Plans</i>, QA/G-5, December 2002 (<a href="http://www.epa.gov/quality/qs-docs/g5-final.pdf">http://www.epa.gov/quality/qs-docs/g5-final.pdf</a>)</li> </ol> <p>In some cases when secondary data is used, a Quality Assurance (QA) Project Plan is required.</p> <p>Guidance for developing a QA plan for secondary data can be found at <a href="https://www.epa.gov/quality/quality-assurance-project-plan-requirements-secondary-data-research-projects">https://www.epa.gov/quality/quality-assurance-project-plan-requirements-secondary-data-research-projects</a>. 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>
<p><b><u>Qualifications of Offeror</u></b></p>	<p>This section outlines the experience required by the Offeror’s personnel assigned to perform under the Contract.</p>

Please note, if awarded funding, where applicable, draft reports, data, and deliverable products should be provided to the GIT technical leads (GIT point of contact for the scope of work) sufficiently in advance of the end of the contract date such that an effective iterative process can 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 Contractor. The draft review process should be reflected in all Requests for Proposals (RFP) responses where applicable; Contractor 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 Contractor, will determine when that presentation would be most advantageous. Any substantive comments, questions or edits received through this process should be incorporated into the final deliverable products. Finally, Offerors should develop a timeline that will account for this iterative process.

**Scope of Work 10: Chesapeake Watershed Conservation Finance Intensive Workshop (Maximum Bid: \$20,500)**

<p><b><u>Goal Implementation Team (GIT)</u></b></p>	<p>Maintain Healthy Watersheds Goal Implementation Team (GIT 4);                  Stewardship GIT (Land Conservation Goal) (GIT 5)</p>
<p><b><u>Purpose and Outcomes</u></b></p>	<p>Land conservation delivers enormous benefits to people and communities, including cleaner drinking water, reduced air pollution, habitat for fish and wildlife, scenic and historic resources, recreational opportunities, resilience to drought and flood, reliable food and fiber, and much more. The 2014 Chesapeake Bay Watershed Agreement set forth an ambitious</p>

goal for new land protection, in part to protect many of these public benefits and values, including cleaner and healthier water (<https://www.epa.gov/sites/production/files/2016-01/documents/attachment1chesapeakebaywatershedagreement.pdf>). Meeting this goal requires increasingly strategic, focused, and ambitious land conservation projects for which land conservation practitioners *must successfully access existing, new, innovative, and more complex sources of land protection and watershed restoration funding* from both public and private sources.

Established national-scale conservation finance training courses have helped increase the ability of land and resource conservation professionals nationwide to access existing and new funding sources, to package, leverage, and match funding and financing resources, and to apply innovative financing strategies to their work. In the Chesapeake, some of these innovative strategies are already being deployed but need to be disseminated as models, scaled up, and replicated by others. The intensive training outlined in this Scope of Work is envisioned as a Chesapeake-specific workshop based on these previously successful national models—but focused on those financing strategies most relevant and promising for the Chesapeake watershed’s unique circumstances.

The goal of this multi-day course is to *increase the knowledge, skills, and ability of land conservation practitioners to tap existing, new and more complex sources of public funding and private capital* to accelerate strategic land conservation efforts and undertake more ambitious projects that provide even greater public benefit.

This workshop will offer in-depth information about innovative, sophisticated land conservation and watershed restoration funding sources and finance mechanisms in both the public and private spheres. Participants—practitioners of land conservation in both nonprofit land trusts and local, state, and national agencies—will *learn about and begin to plan for implementation of the most relevant existing and new funding/financing strategies* for their land conservation efforts overall and to meet specific project challenges.

The outcomes of this work are as follows:

1. Increased knowledge, skills, and ability of land conservation practitioners in the Chesapeake watershed to access existing, new, and innovative sources of public and private funding to support land conservation and watershed restoration on conserved lands.
2. A peer network of workshop participants who can share future resources, ideas, and mentor and support one another in the application of new knowledge gained through the workshop.
3. Increased rate and strategic focus of land conservation to accelerate progress towards the:
  - Chesapeake Conservation Partnership (<http://www.chesapeakeconservation.org/index.php/our-work/goals-progress/>) and
  - Chesapeake Bay Watershed Agreement goals (<https://www.chesapeakeprogress.com/conserved-lands/protected-lands>).

Note: The Chesapeake Bay Program Partnership has identified two approaches (among others) in its Management Strategy to achieve the Protected Lands goals in the Bay Agreement that are: 1) increasing funding, incentives, and mechanisms for protecting conservation priorities and 2) increasing the capacity and effectiveness of land trusts. This workshop will also support both of these approaches ([https://www.chesapeakebay.net/documents/22065/5\\_protected\\_lands\\_public\\_3-13-15.pdf](https://www.chesapeakebay.net/documents/22065/5_protected_lands_public_3-13-15.pdf)).

<p><b><u>Maximum Bid Amount</u></b></p>	<p>\$20,500, including consultant time, faculty participation costs (if applicable), travel, and materials.</p> <p>It is anticipated that matching grants in the amount of up to \$15,000 will also be secured to cover costs of training venue, food, and other logistics, in addition to in-kind outreach/implementation services provided by the project advisory group. (Workshop participants will cover their own lodging and travel.)</p>
<p><b><u>Project Steps and Timeline</u></b></p>	<p>Task 1: Develop Training Workshop Curriculum, Faculty Member Identification/Recruitment, and Materials (Timeline: March 2019-June 2019)</p> <ol style="list-style-type: none"> <li>1.1. The workshop curriculum should include presentations/instruction on conservation finance, including a “101” introduction, and those existing and new funding sources <u>beyond</u> traditional private grants, donations, events, etc. that are most relevant and viable for the Chesapeake watershed context, including:             <ol style="list-style-type: none"> <li>a. Compliance/mitigation funding, e.g., wetlands and species mitigation</li> <li>b. Ecosystem services markets, e.g., water quality/nutrient credit trading, and carbon storage</li> <li>c. Public-driven, dedicated funding mechanisms, e.g., water funds, usage fees, land conservation ballot initiatives, clean water revolving loan funds</li> <li>d. Pay-for-success models, e.g., environmental impact bonds, etc.</li> </ol> </li> <li>1.2. The target audience for the workshop is professional land conservation practitioners (i.e., non-profit land trust easement/acquisition staff, and local, state and federal easement/land conservation program staff) who are regularly accessing traditional sources of funding, but not yet substantially using more complex or innovative funding sources. It is expected that most of the land trusts engaged will have one or more full-time staff and a strategic conservation plan that identifies and prioritizes conservation values that would align with funding sources outlined above in 1.1. The contractor should plan the course syllabus and materials to be appropriate to this audience.</li> <li>1.3. Contractor will work with project advisory group to identify and recruit faculty members with expertise in the topics outlined above and, where possible, case studies/examples of relevant projects from within the Chesapeake watershed. Contractor will be responsible for ongoing faculty communications and preparation for the workshop, as well as covering travel costs and honoraria for faculty, if needed/applicable. Faculty course lodging and workshop meals will be covered by matching grants/other funding external to this contract.</li> <li>1.4. Project advisory group will assist in faculty participant and case study identification and provide periodic input as needed. Advisory group will include at least the individuals listed below in “Reviewers List,” and may expand to include 1-2 additional individuals based on needs and skills of selected contractor.</li> <li>1.5. Workshop materials to be developed by the contractor include:             <ol style="list-style-type: none"> <li>a. detailed syllabus with learning objectives identified for each section;</li> <li>b. background materials to be used as pre-reading for workshop participants; while no original materials are required to be developed, contractor will assemble and curate articles, websites, references, and other resources—either suggested by faculty or identified by</li> </ol> </li> </ol>

contractor and presented to/approved by advisory group—that address workshop topics. These materials should be selected, assembled, and provided electronically to participants *no later than* one month in advance of the workshop. Note: It is anticipated that the advisory group will also have developed a catalogue of existing funding sources by the time of the workshop to be used as a reference.

- c. evaluation of the workshop that will assess participant satisfaction and increased confidence, and identify potential future information and training needs.

Task 2: Assist in Promoting Workshop, and Managing Applications (Timeline: May-August 2019)

- 2.1. Contractor will develop course introductory outreach materials for circulation.
- 2.2. Advisory group will, with participation of contractor, identify potential participants to target for outreach, including both standard electronic course outreach and high-touch, personal outreach (to be conducted by advisory group members). Contractor will maintain central list of contacts for potential and registered participants.
- 2.3. Contractor may be asked to provide advice on electronic application mechanism and format to easily access participant information and facilitate communications with registrants. Advisory group members (or their home organizations) will have the lead for managing the application/registration process.
- 2.4. Together, contractor and advisory group will develop and disseminate an application form that interested parties will be required to complete to participate. This application will provide brief information about applicants' interest in the workshop, their experience in working with course-relevant funding/financing sources, and, if applicable, brief background information about a current project that would be facilitated or assisted by the workshop's content.
- 2.5. If there is greater interest in attending than there are available spots, applicants will be selected by the advisory group based on strength of their application (including applicability of the course content to their described work and readiness to deploy new knowledge on near-term projects), geographic representation in the watershed, and organizational profile, and role (seeking mix of nonprofit and agency practitioners)

Task 3: Deliver Workshop (Timeline: August 2019)

- 2.1. Contractor will directly manage and support faculty and curriculum flow on site at the workshop, and be briefed on and available as backup to troubleshoot logistics and other on-site concerns if needed.
- 2.2. Advisory group, in consultation with contractor and stakeholder participants, will identify, secure, and coordinate suitable training venue and additional logistics (e.g., meals, audio-visual needs).
- 2.3. The goal of the workshop will be to train up to 40 participants, from the target audiences identified in 1.2.
- 2.4. The workshop will take place over at least two and no more than three days, including evening instruction or discussion, with opportunity for participants to lodge overnight at or near the training venue.
- 2.5. Participants will cover their own travel and lodging costs; instructional costs will be covered under this contract; and venue and workshop logistics (e.g., AV, participant materials, etc.) costs will be covered with other grants.

	<p>Task 4: Post-Workshop: Evaluate workshop, conduct workshop follow-up, provide brief summary report, help establish peer network mechanism and hand off to more permanent moderator (Timeline: August 2019-October 2019)</p> <p>4.1.Immediately after workshop—while participants are still on-site—contractor will solicit evaluations of the workshop’s content, utility in meeting participants’ needs, qualitative feedback on progress towards meeting Outcome #1 above, and whether participants identify additional interests and needs for future training. Contractor will summarize evaluation feedback and recommendations in a brief report, including recommending how stakeholder participants could evaluate longer-term outcomes 6-9 months post-training.</p> <p>4.2.Contractor will provide email template for post-course follow-up, including additional materials whether provided by faculty or advisory group or identified during course discussions.</p> <p>4.3 Contractor will recommend and develop initial mechanism (e.g., email, listserv, webpage) to establish ongoing peer network communications among workshop participants, to be handed off to one of the stakeholder participants to maintain and further develop.</p> <p>Task 5: Submission of a Final Report (Timeline: November 2019)</p> <p>5.1.Contract will prepare a final report on the project for submission to the Chesapeake Bay Trust, the project advisory group and stakeholder participants that provided in #1 through #4 (below).</p> <p>Note: Consultant will meet regularly by phone with advisory group, GIT leads, and other identified stakeholders to review progress, draft work products, and report on and assign action items.</p>
<p><b><u>Stakeholder Participants</u></b></p>	<ol style="list-style-type: none"> <li>1. Maintain Healthy Watersheds GIT</li> <li>2. Stewardship GIT (Land Conservation Goal Leadership)</li> <li>3. State Land Trust Associations in the three major Bay watershed states:             <ul style="list-style-type: none"> <li>• Virginia’s United Land Trusts</li> <li>• Maryland Environmental Trust</li> <li>• Pennsylvania Land Trust Association</li> </ul> </li> <li>4. Relevant government agency land conservation staff in three major Bay watershed states</li> </ol> <p>*Note: Stakeholders under #3 and #4 above, will be engaged and updated as needed by members of the advisory group who have existing partnerships with these stakeholders.</p> <p>*Contacts for all stakeholders will be provided by GIT lead at the start of project.</p>
<p><b><u>Deliverables</u></b></p>	<ol style="list-style-type: none"> <li>1. A package of curated materials for participant pre-course, background reading</li> <li>2. Detailed course syllabus with learning objectives/outcomes specified</li> <li>3. Faculty contact list, with bios</li> <li>4. A 2-day or 3-day in-person training workshop on conservation finance, including accessing existing/new/innovative public and private funding resources, with a focus on ecosystem services markets (e.g., mitigation, water quality trading, carbon, etc.) and strategies with a private investment component (e.g., public-private partnerships, pay-for-success models, etc.)</li> <li>5. Participant evaluations of the workshop that assess gains in knowledge, skills, and/or ability to access existing/new/different sources of funding</li> <li>6. An initial peer network communication mechanism, and introductory content, to be</li> </ol>

	<p>handed over to a future moderator (TBD from stakeholder participants).</p> <p>Note: Project advisory group will also develop an inventory of existing funding/financing programs to be used as a resource in the workshop and by other stakeholders.</p>
<p><b><u>QAPP Requirement</u></b></p>	<p>No QAPP will be needed under this scope of work.</p>
<p><b><u>Qualifications of Offeror</u></b></p>	<p>Qualification 1: Offeror should demonstrate expertise in developing curriculum for experienced adult professionals, preparing and coordinating faculty, and curating and assembling background materials that are topically relevant and helpful to participants. Offeror should provide two examples (agendas, syllabi, or course descriptions) of a substantive, multi-day training workshop or other event with a substantial learning component that s/he has organized and delivered.</p> <p>Qualification 2: Offeror should demonstrate either working knowledge of or expertise in conservation finance tools and innovative funding approaches for land conservation and/or watershed restoration, especially with regard to market- and mitigation-based methods. Offeror should provide a description of this knowledge/expertise (up to 250 words; plus relevant attachments, if applicable)</p> <p>Qualification 3: Offeror should demonstrate experience in creating professional peer network communications processes or tools. Offeror should provide at least one example of peer network communications support mechanisms or processes that have been developed over the past ten years. It is preferable that examples have an environmental focus.</p>