

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONSULTANT SERVICES

NETWORK EVALUATION, TRAINING, AND DEVELOPMENT OF A COMMUNITY OF PRACTICE TO SUPPORT THE REGIONAL CAPACITY BUILDING INITIATIVE OF THE CHESAPEAKE BAY FUNDERS NETWORK

SECTION I - INTRODUCTION

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to solicit services to evaluate, and train regional networks and develop a community of practice to increase network sustainability in partnership with the Chesapeake Bay Funders Network (CBFN) as part of the Capacity Building Initiative. The work to be supported will advance outcomes from the Chesapeake Bay Agreement. The Funding is supplied by the Chesapeake Bay Trust and the Environmental Protection Agency (EPA) Chesapeake Bay Program through the National Fish and Wildlife Foundation.

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

2.1 Scope

Maximum bid: Bids not to exceed \$100,000; with the potential for multi-year funding contingent upon funding availability

Timeline: Work must be completed by March 1, 2023; however, the scope of work and contract timeline may be extended to be multi-year as additional funding is available.

a. Scope of Work – Introduction

The contractual services would support the Regional Capacity Building Initiative described here. The purposes of this initiative are to a) increase the collective and individual grassroots capacity to accomplish regional goals at the intersection of community and environment and b) establish durable, powerful, and coordinated efforts to advance programs and policies to improve regions and communities beyond the term of the initiative.

This combination of goals involves multiple organizations working on a cross section of issues working together. Technical assistance, training, and grants will be provided to strengthen and diversify regional collaborations working together to advance a shared regional and community driven agenda that improves the quality of life in the region and protects and restores natural resources.

Five regions have been selected to participate in this initiative. Each one is unique, but all will work across sectors at a community, watershed, and/or regional scale to develop a collaborative work plan and strategies that could include improving human health; creating economic opportunity; advancing clean water plans; increasing access to local, sustainable food; conserving lands; protecting and enhancing community open space; and accomplishing other community-related and/or natural resource goals.

The Five Regions Engaged in the Initiative and brief descriptions of the network are as follows (additional information about the priorities for each regional network can be viewed in Appendix A):

Anacostia Park and Community Collaborative (APACC) – Wards 7 and 8, Washington, DC
APACC is a network of community members and organizations working together to make the Anacostia River and its park system the best possible resource for DC residents, especially folks living east of the river. Within the target region there are not only 1,200 acres of parkland, but adjacent clusters of communities on the river's east side facing a host of endemic challenges, from health and nutrition to public safety and access to quality schools. APACC's aim is to link nearby communities to the river and park in a way that addresses these challenges and substantially benefits the quality of peoples' lives and the health of natural resources.

Baltimore Region (Network TBD) - The Baltimore regional partnership will increase the capacity of regional partners to improve community and natural resource health within the priority region. This will be accomplished by engaging other nonprofit and government organizations performing work across the public health, community organizing, workforce development, and green infrastructure efforts. The result of this partnership will lead to a greater number of intersectional projects identified with a higher level of community leadership and support, and increased coordination of local partners.

Envision the Choptank – Eastern Shore, Maryland
Envision the Choptank is a network that has been operating since 2015. The network brings together nonprofits, government agencies, scientists, and community groups to identify solutions that will restore swimmable, fishable waters to the Choptank River and support healthy and productive native oyster reefs. To encourage collaboration, Envision the Choptank follows a collective impact framework.

Lancaster Clean Water Partners - Lancaster County, Pennsylvania
Lancaster County Clean Water Partners aims to unite Lancaster's various perspectives to achieve a shared vision of clean and clear water in Lancaster County by 2040. The network is a countywide partnership of diverse organizations that come together with a common agenda and other tenants of collective impact. The network is led by an executive committee and steering committee, with full-time support from staff.

Shenandoah Valley Partnership (Network Name TBD)- Shenandoah Valley, Virginia
Partners in the Shenandoah will develop a cross-sector network of organizations to integrate water quality with multiple issues and actions and integrate equity and justice into the region's strategies to meet Bay restoration goals, protect the Valley's extraordinary natural resources, and improve the quality of life for all residents.

The Regional Capacity Building Initiative is an initiative of CBFN and is managed by the Chesapeake Bay Trust. Partners include the Chesapeake Bay Trust, National Fish and Wildlife Foundation, Keith Campbell Foundation, Hillsdale Fund, Agua Fund, Morris and Gwendolyn Cafritz Foundation, Prince Charitable Trusts, and Kentfields Foundation.

b. Scope of Work – Deliverables.

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

The contractor will build a community of practice (a group of people who share similar goals and will learn how to accomplish those goals better as they interact) among five networks and will provide customized network evaluation, development, and training services with each of the five networks. Three main components of the work are:

- 1) Development and implementation of a network evaluation tool to assess the networks' current development status and capacity and identify challenges to inform tailored network development services;
- 2) Development of a community of practice among the networks;
- 3) Network Development services and Training of network members on the characteristics of healthy and successful networks, ideally sharing examples of effective networks structure, trainings should include a focus on network sustainability among other topics.

2.2.1 Network assessment and evaluation services: Offerors are asked to submit proposals to assess the the networks through the development of a network evaluation tool that can be administered at multiple time steps to assess change over time. Key evaluation metrics should be defined and baseline information on the status of the networks should be collected, synthesized, and summarized into custom reports for each of the networks. This assessment effort may also be designed to inform (to some degree) the types of network development services and training content provided.

2.2.2 Development of a community of practice: The contractor will develop a community of practice among all five networks and will develop and lead educational trainings on network health and evolution: The contractor will provide at least two half-day joint trainings and one two-day joint training to all network members, as well as one webinar to the CBI Workgroup of CBFN. The network trainings should be tailored based on outcomes from the formative evaluation, but may include topics such as:

- a) the characteristics of healthy networks,
- b) examples of effective networks governance, leadership, decision-making, and sustainability,
- c) the challenges and even failures of networks that have come and gone,
- d) the stages of network evolution
- e) the development of break-out activities that networks can undertake to self-assess their own stage of development.
- f) how networks sustain financially over time

For the CBI Workgroup (funders of this initiative), webinar training topics should include information and recommendations on best practices for funders when endeavoring to build a network.

2.2.3 Network development services: It is expected that network development services will be tailored based on each of the individual network's needs. Examples of potential needs could include:

- a. deeper relationships among existing network members;
- b. refinement and prioritization of their collaborative work plans;
- c. evolution of current leadership structures to ensure that decentralized decision making is institutionalized (i.e. decision making is shared among network members)
- d. development of shared measurements of success as it relates to their priority goal and other collective goals within their network work plans.

Offerors are asked to describe in their proposals their experience with each of these services and provide an estimate of the number of hours they would have available for each network for assisting with various needs.

2.2.4 Deliverables for Scope of Work

- A draft network evaluation tool and report card for review
- A finalized network evaluation tool that can be administered iteratively over time
- Written summary of the results of the evaluation tool for each network, including tailored recommendations for network development and training
- Written summary of network development services provided to each network and recommendations for continued support
- Draft agendas for 2-3 half-day trainings and one two-day training to build a community of practice and increase knowledge about network health and sustainability for review
- Final agendas for the two half-day trainings and one two-day training content, including clear knowledge objectives for participants
- Draft power-point for CBI Workgroup presentation on the community of practice and individual network status and recommendations
- Delivered a minimum of 3 trainings for network members
- Delivered webinar for CBI Workgroup
- Final report including a summary of network development and sustainability, recommendations for next steps for the community of practice, and each network to ensure sustainability and/or other actions to support increased refinement and implementation of the existing collaborative work plans.

c. Qualifications and expertise

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

- Eight or more years of related experience in network development, assessment, evaluation, and cross-sector collaboration – Required
- Eight or more years of related experience building communities of practice as defined above - Required
- Five or more years of related experience working with diverse populations – Required
- Expertise in group management and participation balancing – Preferred

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SECTION III – ADDITIONAL SERVICES

Additional Services. The Contract Officer may request ancillary or additional services within the capacity of the Contractor as may be useful or necessary in the interests of the Trust and the Project for any of the above Scopes of Work.

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

SECTION IV - PROPOSAL FORMAT AND SUBMISSION INFORMATION

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

Contract Officer: Kacey Wetzel
Telephone Number: 410-974-2941 x104
E-Mail: kacey.barrett@gmail.com
Address: Chesapeake Bay Trust
108 Severn Avenue
Annapolis, MD 21403

The sole point of contact for the purpose of this RFP is the Contract Officer.

4.2 **Prospective Offerors:** An “Offeror” is a person or entity that submits a proposal in response to this RFP.

4.3 **Cancellation; Discretion of Contract Officer:** This RFP may be canceled in whole or in part and any proposal may be rejected in whole or in part at the discretion of the Contract Officer. In addition, the Contract officer has the right to negotiate separately with any Offeror in any manner which will best serve the interests of the Trust. The Contract Officer may waive any mandatory condition or minimum qualification if she determines that such action is in the best interest of the Trust.

4.4 **Submission Instructions/Proposal Closing Date:**

Offerors must submit proposals using our Online Application System, located at:

https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35341

no later than **4:00 p.m. on December 8th** (the "**Closing Date**"). Requests for extensions will not be granted, late applications will not be accepted, and the online funding opportunity will close promptly at 4:00 pm. **Offerors are strongly encouraged to submit at least a few days prior to the deadline** given potential for high website traffic on the due date. The Trust cannot guarantee availability of Online Application System technical assistance on the deadline date. If email confirmation of submission is not received within two business days, please contact the Principal Solicitation Officer listed in Section 4.1.

Proposals are irrevocable for 90 days following the Closing Date.

4.5 **Proposal Format:**

Narrative:

You will be asked to submit a narrative. Each proposal must include responses to a-d in a concise (≤5 pages) description. Items e) and f) may be addressed outside of the 5-page limit and may be attached as additional pages. All material must be submitted in one electronic file.

- a) Names of individuals providing the services and number of years of experience in such areas
- b) The individual's proposal for how to address the elements of the scope(s) of work and required outcomes described in the services and deliverables section (Section II above).
- c) Response to the qualifications section: a description of the experience to provide services in the topics described above as described in Section 2.5,
- d) Names, phone numbers, and email addresses of three references
- e) The resume or CV of the individual(s) providing the service
- f) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

Budget:

The Offeror shall submit a budget including total number of hours and hourly rate of compensation for the services to be performed during the term of the Contract broken down by direct rate, benefit rate, indirect rate, profit, and direct expenses; any additional costs required to complete the project; and total compensation. Under this program, food and beverage costs will not be supported. Use the Application Budget worksheet in the Financial Management Spreadsheet accessible at www.cbtrust.org/forms, and if needed, provide additional justification or explanation as an attachment to the proposal. The proposed rates of compensation will be irrevocable for a period of 90 days from the Closing Date, or if modified during negotiations, for a period of 90 days from the date such modified rates are proposed by the Offeror. If your proposed indirect rate is higher than 10% of the direct costs and your proposal is selected for funding, you will be required to provide the Negotiated Indirect Cost Rate Agreement (NICRA) documentation.

Subcontracting Opportunities. It is assumed this solicitation will result in a small procurement that will not provide realistic opportunities for subcontracting, though multiple organizations may apply as a collaborative or partnership with an identified project lead. If, however, a offeror considers subcontracting of services to be available, they should so specify, and in that case demonstrate compliance with Good Faith Efforts to engage Disadvantaged Business Enterprises.

4.6 **Professional Liability Insurance:** The Offeror shall agree to maintain in full force and effect during the term of the Contract usual and customary amounts of liability insurance coverage in connection with the performance or failure to perform services under the Contract.

4.7 **Eligible Organizations:** No entity may enter into a Contract with the Chesapeake Bay Trust under this funding opportunity unless the entity has provided its DUNS number to the Trust.

SECTION V - EVALUATION PROCEDURE

5.1 **Qualifying Proposals:** The Contract Officer will review each proposal for compliance with the minimum qualifications set forth in "Offeror's Minimum Qualifications."

5.2 **Deviations and Negotiation.** The Contract Officer shall have the sole right to determine whether any deviation from the requirements of this RFP is substantial in nature, and the Contract Officer may reject non-conforming proposals. In addition, the Contract Officer may waive minor irregularities in proposals, allow an Offeror to correct minor irregularities, and negotiate with responsible Offerors in any manner deemed necessary or desirable to serve the best interests of the Project.

5.3 **Evaluation.** Proposals shall be evaluated by a review committee composed of technical experts and facilitated by the Contract Officer. Evaluation will be made on the basis of the evaluation criteria discussed below and may include any oral presentation that may be required by the Contract Officer, through a recommendation by the technical review committee, at his or her discretion. The Contract Officer reserves the right to recommend an Offeror for contract award based upon the Offeror's proposal without oral presentations or further discussion. However, the Contract Officer may engage in further discussion if he or she determines that it might be beneficial. In such case, the Contract Officer will notify those responsible Offerors with whom further discussion is desired. In addition, the Contract Officer may permit qualified Offerors to revise their proposals by submitting "best and final" offers.

5.4 **Evaluation Considerations:** Proposals and any oral presentation by Offerors who meet the minimum qualifications set forth in Section II will be evaluated by the technical review committee on the basis of the following factors:

- A. **Proposed Team (Specific Individual(s) Responsible for Performance of Contract).** Evaluation of the qualifications, reputation, and compatibility with needs of the Trust and the Project of the individual or individuals who will perform the Contract.
- B. **Proposed Approach.** Evaluation of the work to be performed to accomplish the goals outlined in the Scopes of Work in Section II.
- C. **Experience of Offeror.** Evaluation of the quality and quantity of the Offeror's experience and expertise in the areas proposed, supported by references.
- D. **Capacity.** Evaluation of the Offeror's ability and commitment to meet timeline for the Project.
- E. **Price and Hours.** Hourly rate and number of hours to be devoted to the project.

SECTION VI: OTHER INFORMATION

6.1 **Disclosure:** Proposals submitted in response to this RFP may be provided to government agencies and be subject to disclosure pursuant to the provisions of the Access to Public Records Act of the State Government Article of the Annotated Code of Maryland (the "Public Information Act"). Offerors must specifically identify those portions of their proposals, if any, which they deem to contain confidential or proprietary information and must provide justification why such materials should not, upon request, be disclosed by the State under the Public Information Act.

6.2 **Expenses:** The Trust and the Contract Officer are not responsible for any direct or indirect expenses which an Offeror may incur in preparing and submitting a proposal, participating in the evaluation process, or in consequence of this solicitation process for any reason.

6.3 **Acceptance of Terms and Conditions:** By submitting a proposal in response to this RFP, (A) the Offeror accepts all of the terms and conditions set forth in this RFP; (B) the Offeror, if selected for award, agrees that it will comply with all federal, State, and local laws applicable to its activities and obligations under the Contract; (C) the Offeror shall be deemed to represent that it is not in arrears in the payment of any obligation due and owing the United States Government or the State or any department or unit thereof, including, without limitation, the payment of taxes and employee benefits, and, if selected for award, that it shall not become so in arrears during the term of the Contract; and (D) the Offeror, acknowledges that they are compliant with federal employment and non-discrimination laws and have not been debarred, convicted, charged or had civil judgment rendered against them for fraud or related offense by any government agency (federal, State, or local) or been terminated for cause or default by any government agency (federal, State, or local).

6.4 **Disadvantaged Business Enterprise/Minority Business Enterprise (DBE/MBE) Participation:** This RFP encourages the participation of DBE/MBE firms (members of a group as defined in the State Finance and Procurement Article of the Annotated Code of Maryland (the "Procurement Article"), Section 14-301(f)(i)(ii)). The Trust encourages DBE/MBE firms who meet the minimum qualifications to respond to this RFP.

6.5 **Parties to the Contract:** The contract to be entered into as a result of this RFP (the "Contract") shall be between the successful Offeror (the "Contractor") and the Trust and may be subject to EPA approval prior to Contract award.

6.6 **Contract Documents.** The Contract shall include the following documents: this RFP, the Contractor's Proposal (to the extent not inconsistent with the RFP or the Contract), and the Contract. In the event of an inconsistency, the Contract shall have priority over the other documents and specific conditions of the Contract shall have priority over General Conditions.

6.7 **Contract Term.** The Contract term shall commence as of a date to be specified in the Contract and, unless sooner terminated in accordance with the Contract, shall end when all work authorized under the Contract has been successfully completed, unless the Contract is renewed or extended at the sole option of the Contract Officer.

6.8 **Billing Procedures and Compensation.**

A. **Method.** The Contracts to be entered into as a result of this RFP will not exceed the small procurement threshold fixed at 41 U.S.C. 403 (11) (currently \$150,000.) The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and the National Fish and Wildlife Foundation. These may entail monthly reporting of time and eligible expenses or may be based upon satisfactory completion of benchmark tasks.

B. **Records.** The Contractor(s) shall submit invoices in a form acceptable to the Contract Officer and maintain records relating to the costs and expenses incurred by the Contractor(s) in the performance of the Contracts for a period of three years from the date of final Project payment under the Contracts.

6.9 **Certification.** The Offeror shall certify that, to the best of its knowledge, the price information submitted is accurate, complete, and correct as of the Closing Date, and if negotiations are conducted as of the date of "best and final offer."

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

Appendix A: Regional Priorities for Selected Networks

Between summer 2020 and spring 2021 a regional capacity assessment was conducted of priority regions in the Chesapeake watershed. These regions were selected for assessment based on an iterative mapping process and stakeholder input. Several factors were considered when prioritizing regional assessment work, including the degree of pollutant loading, development pressure, prevalence of factors tracked via EPA's Environmental Justice Screen, and the opportunity to build capacity in the region given current resources. Third-party services focused on surfacing key barriers to improving natural resources and associated focus areas that should be addressed as well as the collaborative capacity of stakeholders in the selected regions. Assessment work included an iterative set of interviews resulting in tailored capacity assessment reports for each region, a portion of the outcomes of each of the reports is summarized below.

Anacostia Park and Community Collaborative – Five focus areas were identified as high priority to be addressed in the Anacostia region, including:

- **Reframing the “Environment”** - The capacity assessment in the Anacostia highlighted the need to talk about how community members describe “the environment” and how nearby resources can support personal growth. To engage a broader set of residents in water quality and natural resource issues, the environment must be reframed in new ways. Ideas ranged from community storytelling to connecting older residents and children, restorative justice circles, and coordination with homeless support services. The recently

completed Women Like Us cohort sought to improve mental health for ten participants through nature-based trauma-informed care programming. This is a much broader framing of environmental benefits than typical benefits such as walking, biking, and fishing, but is critical to engaging a wider range of residents in an authentic way. Using a broader framing will make it easier to engage the community in natural resource and health issues that impact them.

- **Developing Green Jobs** - Green jobs are a priority in the Anacostia because there are gaps in which green jobs are needed (especially for maintenance of green infrastructure projects) and unemployment rates in Ward 7 and 8 are very high. It has been difficult to secure long-term jobs for graduates of green job certification programs. Some example efforts to date include the Ward 8 Woods which provides jobs to clean up parks, the Anacostia Park Community Corps, and Ranger Programs at Kingman and Heritage Islands Park. Workforce development organizations like Ward 7-based Constituent Services Worldwide trains workers for a wide range of green infrastructure services (e.g., rain gardens, green roofs, wetland planting, and other stormwater infrastructure). While additional efforts are underway via the DC Green Jobs Workgroup, enhanced strategies to advance green job development are critical.
- **Building Community Leaders** – While some leadership development efforts are underway, such as Community Leadership Empowerment Workshops (CLEW) as part of the 11th Street Bridge Project, and the APACC Fund to support community projects and give leaders on-the-ground experience, there is still a significant need for leadership development programs to enhance community-led efforts.
- **Environmental Education** – The capacity assessment identified the need to help shift how the community views the environment by continuing to connect youth and teenagers directly to the environment through school coursework and community events. By increasing the environmental literacy of teens in the priority region (who will soon be young adults) the social capital of the region will be lifted so that residents have the knowledge and skills necessary to engage on natural resource and community health issues that impact their lives.
- **Water Quality and Community Health** – The capacity assessment surfaced a desire for successful community programs that are both improving water quality and community health to be expanded. For example, Anacostia Riverkeeper’s water quality testing and restoration work and Ward 8 Woods litter clean up events were both identified as scalable efforts. Additionally, it was noted that enhancement of the ongoing efforts to start a bottle and can recycling program and expansion of the civic engagement efforts led by the several regional non-profits related to the Sediment Project and improving stormwater permits are important efforts that should be scaled up.

Baltimore Metro Region – Three focus areas were identified as high priorities to be addressed in the Baltimore Metro region.

- **Strengthen Cross-Jurisdictional Collaboration** - Implementation of the strategies that show promise of strengthening cross-jurisdictional collaboration and building a broader coalition to engage with city and county government agencies with a unified message. The checkered history of city-county collaboration suggests that it would take a multi-year, sustained campaign by NGOs, institutions, and funders to ensure that government leaders and agency staff see the value of collaboration so that it extends beyond the current administrations. This five-year capacity building initiative is a rare opportunity to create that sustained effort, building on efforts already underway.
- **Strengthening the number, capacity, and connectiveness of community-based organizers and organizations** - Strengthening the number, capacity, and sense of connection of community-based organizers could have a significant impact on the effectiveness of environmental and community health partnerships, networks, and initiatives in the Baltimore region. Stronger community-based organizations within the Baltimore Metro region could mobilize more voices of support around city-county wide initiatives and priorities and potentially garner greater attention from the government for increased funding and policies that are shared priorities of NGOs working on environmental and community health issues.
- **Workforce Development** – The assessment surfaced a need to convene organizations and explore a more formal collaborative effort to address the barriers to scaling up workforce development and job placement. There is a need to reach out to a broad range of workforce development organizations in the region to ensure information is shared effectively and the best strategies are advanced within the region. The purpose of the convening would be to discuss opportunities and barriers and clarify the level of commitment of invited organizations to working together to address them.

Envision the Choptank – Two focus areas were identified as high priorities to be addressed in the Choptank River Watershed.

- **Expand Coordination to support Local Governments and Communities** - Through fundraising and collaborative efforts, partners in the region have piloted several successful initiatives to share “circuit rider” positions to provide technical assistance, outreach, and coordination to farmers, residential landowners, and local governments, to help coordinate and streamline assistance among multiple organizational partners. The regional assessment found that these pilot efforts of shared and coordinated support offered tremendous value to organizational and governmental partners alike. As a result there is a continued need to provide additional shared support, particularly for municipalities and counties, around grant writing, grant management, and planning services. While efforts are underway to build on the work piloted by the Chesapeake Bay Foundation and Healthy Waters Round Table, additional support for to advance to expand coordination is needed.

Opportunities exist to work with communities and potentially universities to develop a watershed-wide data layer of stormwater flooding, aiding local governments in strengthening the objectives and strategies (related to water quality and natural resource protection and restoration) in comprehensive plans and other plans and ordinances, and expand outreach to disenfranchised communities.

➤ **Develop New Barrier-Busting Collaborations and Approaches** - Despite all the work on-going in the Choptank region, significant barriers and opportunities remain. These include:

- dealing with the ongoing legacy of underfunded maintenance of conservation and restoration practices
- adapting to the changes in land use that are and will continue to occur with climate change.
- finding cost-effective solutions for shoreline restoration and other hard-to-fund restoration practices at scale
- supporting implementation of BMPs for non-operating landowners (NOLs) and leasing farmers
- building collaboration and leveraging the energy of the Mid-Shore Board of Realtors' new Clean Water Committee
- engaging additional disenfranchised communities and deepening the support provided to equip residents and community leaders with the tools they need for effective civic engagement to address water quality and climate change issues.

These important, large-scale, complex issues will require creative interventions to effect necessary change in the region.

Lancaster Clean Water Partners - Three focus areas were identified as high priorities to be addressed in the Lancaster County region.

➤ **Increase Agricultural Technical Service Provision Efficiency and Coordination** - Unfortunately, there are not enough public, non-profit nor private sector agricultural technical service providers to service the need on-the-ground to meet relevant goals, even if there were a modest increase in the total number of full time employees carrying out this work. Several factors, identified in several reports across the Chesapeake, stymie greater efficiency and effectiveness including:

- State budget cycles and the ebb and flow of legislative commitments don't provide a reliable, steady and multi-year investment for staffing. While foundation funding for additional TSPs as well as a Regional Conservation Partnership Program grant and other targeted grant programs have helped, they have been insufficient to address the full need.
- Even if monies are available, state and federal government hiring practices, requirements, budget, staffing caps, and other factors can significantly impede hiring, training and deployment of additional employees.
- Many TSPs are typically not paid sufficiently to keep them on the job for the extended time needed to build both technical sophistication as well as strong relationships with

farmers.¹ A 2017 NFWF report (2017 NFWF and Chesapeake Bay Funders Network’s *Agricultural Technical Assistance Capacity Assessment of the Chesapeake Bay Region*) found that the number one cited barrier to retaining the work force was the inability to competitively compensate employees. Retention is essential because it’s estimated that it takes from 18 to over 24 months for TSPs to be fully independent and effective.

- TSPs “soft skillsets” are difficult to train and somewhat hard to find – those who are successful require a nuanced understanding of and ability to interact with the culture of farmers in a region, be that because of the type of farming (dairy versus beef cattle) or the culture of farmers (Plain Sect or non-religious). The Lancaster CAP notes that retaining enough capacity with the mixed technical and relational skillsets needed, combined with long-term commitment to the role, has been difficult to do.
- TSPs among the public, private, and non-profit sector may at times compete, rather than cooperate, engage the same farmers across different BMPs or programs, and not coordinate in a way that could increase efficiency, BMP adoption, and farmer satisfaction. The Lancaster CAP has identified some success in coordinated agricultural outreach, but this has been limited to a few sub-watersheds.

The Penn State inventory of programs, funding, and resources concluded: “Given the largely partner-driven capacity for outreach in Lancaster County and the funding-driven opportunities for implementation dollars, we recommend a strategic approach that takes advantage of existing skills and resources of the county’s partnership network.” There is no lack of ideas for how to address this capacity, even without necessarily increasing the number of FTEs to undertake the work. Many ideas and options are included in Boots on the Ground and other reports. Ideas include creating a supply of culturally and technically competent providers, providing retention bonuses or other financial incentives for retaining providers longer at typically underpaid publicly-funded positions, retooling the roles and functions of TSPs across organizations within a sub-watershed, or building a senior corps of retired farmers to undertake some of the work in a trusted way. The challenge is not a lack of ideas, but rather their testing on the ground from those doing the work, as well as those on the ground prioritizing capacity building investments with the most leverage and greatest chance of success. And of course, funding the priorities chosen.

- **Create and Implement a County-wide Clean Water Investment Plan** - The updated 2020 Lancaster Countywide Action Plan (CAP) outlines a path for achieving a 11-million-pound reduction in nitrogen and a 500,000-pound phosphorus reduction for cleaner and clearer water for throughout the county. This must be done by taking action with agricultural best management practices (BMPs), stormwater BMPs, riparian buffers and restoration practices. However, it has been estimated that the CAP would need \$340 million to achieve its goals, far more than the current investments from multiple sources provide.

¹ While there is not readily available data on the exact salary gap, for instance, in Virginia where state salaries are more readily available, the Soil And Water Conservation District Of Thomas Jefferson’s in year 2016 average annual salary was \$27,643 and the median salary was \$25,786. This average salary was 41 percent lower than USA average and the median salary was 41 percent lower than USA median. For the Culpeper Soil and Water Conservation District in year 2019, the annual salary was \$38,146 and the median salary was \$46,111 which was 19 percent lower than USA average and the median salary was 6 percent higher than USA median. (<https://govsalaries.com>).

The Partners assume that there will need to be a *six-fold increase* in funding starting in the second half of 2021, amounting to dollars approaching \$70 million per year.

Currently, partners from across the county draw money from nearly 50 distinct funding programs for a variety of activities. Federal funding agencies include EPA, USDA, NRCS, USDA FSA, and USFWS. State funding programs range from Community Development Block Grants to PENNVEST nonpoint source projects and PA Act 13 programs. County funding programs range from Conservation Excellence Grants to the Lancaster Clean Water Fund and Lancaster MPO's Smart Growth Transportation Program to conservation district programs. Foundation funding comes from such sources as the Steinman Foundation, Feree Foundation, National Fish and Wildlife Foundation, the Chesapeake Bay Trust, and the Campbell Foundation, among others. However, these varied sources of funding come in on different timeframes, with different requirements, to different organizations, and collectively leave gaps in both total funding and in programs funded.

Penn State Agriculture and Environment Center completed an inventory of partners and resources and developed a recommended integrated funding strategy for the county in late 2020. It also called for the need to maintain and grow a diversity of funding sources. The Lancaster CAP noted that key success factor number one will be finding and securing long-term dedicated funding for CAP implementation through a diversified and sustainable set of funds.

- **Growing “Others” Capacity** - The host of organizations across the county will continue to need targeted capacity building support to become even more effective partners for water quality improvements. The capacity assessment surfaced a host of challenges and opportunities. For instance, in some sub-watersheds a few talented individuals have become powerful and effective brokers for increasing the coordination and delivery of technical services to farms in that area. But these individuals will not last forever in their positions and furthermore have much to teach others about coordination, differentiation, and leveraging existing resources. Cities and Towns with MS4 permits are advancing their requirements, as well as looking for opportunities to grow a local workforce, especially for residents of color and those with a more marginalized economic status, through green infrastructure projects. A great deal of work has been done on rural well and septic water quality through monitoring and testing but getting resources to these individuals to address their problems requires increased capacity and interconnection. While there are many actors in the county, in some cases long-standing tensions in relationships need to be addressed and reduced in order to increase working relationships and thus increase effectiveness. The county's many actors need to continue to grow their capacity in how to best and most effectively work with state government.

Shenandoah Valley - Three focus areas were identified as high priority to be addressed in the Valley, including:

- **Expand alliances & connections for movement building** - While the Valley has numerous networks, organizations, and individuals committed to conservation across a host of issues, all these efforts and networks have not necessarily been fully tapped to find common cause. In general, without a greatly expanded movement to support clean water,

healthy communities, natural resources, sustainable economies, and equity in every sphere, Bay restoration goals in the Shenandoah Valley will remain out of reach. Greater equity will likewise remain elusive. Conversely, there is the opportunity to build a broad, deep, and equitable movement to secure funding and public policies necessary to meet the Valley’s Chesapeake Bay and related community health goals. There is a tremendous need, heightened by the national dialogue on race and justice, to engage and expand new constituencies in an authentic and just way. There is a need to bridge the region’s urban-rural divide and build supportive relationships with leaders in communities of color and among demographics rarely involved in decisions about land, water, and economic development.

Rural water issues exist across the Valley in ways not yet fully understood. These issues include private wells with potential bacterial or nutrient contamination; individual septic systems poorly performing, if at all, affecting nearby streams; and small scale non-incorporated municipal systems struggling to operate and function appropriately and within standards. As the state’s Watershed Implementation Plan notes: “Malfunctioning septic systems are currently the leading cause of groundwater pollution in Virginia.” Thus, ensuring small water systems can meet water quality standards and lower-income rural homeowners can both reduce impacts from their septic as well as ensure they have clean water in their private wells is important.

Regarding stormwater, numerous watershed and other groups near and around MS4 permit holders (Harrisonburg, Waynesboro, Stanton, Augusta County, James Madison University, VDOT, others) are not fully informed nor engaged to help move along the implementation of MS4 permits. Opportunities include local employment, green infrastructure, connections to schools and education, and building a stronger rural-urban constituency. There are many interested in rain gardens, swales, highway buffers, green infrastructure, and more natural solutions to drainage and flooding. In addition, there is also opportunity to engage players in the Valley’s smaller communities by helping make green improvements that make these places healthier and more beautiful. Most Valley communities fall below the 50,000-population threshold for such permits. Stormwater BMPs can engage citizens in exciting, hands-on, and sustainable projects that allow them to make a practical difference while being part of a greater movement.

- **Integrate water quality with multiple issues & actions** - Most clean water activities named in the Watershed Implementation Plan are focused on agricultural BMPs and stormwater BMPs. However, there are a host of other activities in the Valley with their primary focus NOT necessarily being water quality that do and can have direct water quality impacts or benefits. These include but are not limited to such issues as rails to trails and growing a more local to regional resilient food system.

For example, the Shenandoah Valley is blessed with great beauty and numerous recreational assets. One of the growing features of the Valley are existing or proposed rails to trails, from the local, few-mile Silver Lake walking path in Dayton to the proposed Cooks Creek and Blacks Run Greenway to the 49-mile proposed trail from Broadway to

Front Royal, connecting Rockingham, Shenandoah and Warren Counties. These trails and greenways provide numerous benefits such as recreational enjoyment, increased property values, economic development, and health benefits of walking and being outside, brought to the forefront due to COVID-19. These trails, many of which are alongside streams and creeks, can also provide an established buffer for water quality, improved wildlife habitat, and the reintroduction of native species where invasive species once dominated.

The Valley has an active group of citizens and NGOs working on the regional trail; however, there are numerous smaller trails and their advocates across the Valley, not to mention organizations within local cities concerned about equity, equal access, recreation, and public health, who are not particularly connected or linked to one another in more powerful ways. A Valley-wide network of trail advocates and proponents could lead to better and faster development of these trails, the realization of their benefits, and linking between key constituent building efforts. Trail development is a focusing and powerful way to build and deepen the rich legacy of conservation in the Valley, while also engaging, educating, and connecting citizens and organizations directly with water quality and diversity, access, and equity initiatives. There are also opportunities to create or improve pocket parks and advance access to and expansion of existing parks. Such place-based advocacy can serve as focusing efforts for capacity and constituent-building.

As another example, there is growing attention toward local and regional food systems with a focus on the sustainability of land and resources, including water, with several actors and constituents. This work includes activities such as reestablishing local value-add meat processing and ensuring Supplemental Nutrition Assistance Program (SNAP) can be used to purchase locally grown, nutrient dense, healthier foods. While these proponents are typically focused on economic development, public health, and equity, their constituents hold the potential to be a powerful advocate(s) for clean water. After all, sustainable, local agriculture can improve water quality through reductions in inputs (pesticides, fertilizers), improved soil health (low or no-till to regenerative rotational grazing), and intensive attention to sustaining the ecological capital of the region. It will be important for groups to engage openly, directly, and transparently about the linkages and connections to water quality. The goal of this and other recommendations is to bring water quality proponents into the fold of related but currently somewhat separate efforts, while at the same time bringing those proponents into the fold of water quality.

Establishing relationships to “show up” for these issues will build trust and reciprocity in strong support and advocacy for water quality.

- **Integrate equity and justice into the region’s strategies to meet Bay restoration goals and protect the Valley’s extraordinary natural resources and improve the quality of life for all residents** - The Valley, like much of the U.S., remains inequitable in terms of access to food, public health, recreational amenities, capital, land, technical services, and other economic opportunities for people of color. There is the need for existing/traditional conservation grantees to learn to identify and authentically engage more diverse constituencies at a one-on-one scale. This work means “going to them,” not asking residents to “come to us.” It means extensive time and patience to build relationships, overcome long barriers of mistrust and neglect, and a commitment to not only begin this journey but stay the course for years to come. There is the opportunity is to address

injustice AND to increase access to clean water, air, and land and the resulting public health benefits AND to improve quality of life AND to expand and sustain a powerful sense of home, place and stewardship in the Valley that is inclusive of all.