Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONSULTANT SERVICES
Legislative Strategy and Funding Protection Consulting Services

SECTION I - INTRODUCTION

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to secure specialized public affairs consulting services to support the Chesapeake Bay Trust's mission, programs, and long-term organizational sustainability. Particular emphasis will be placed on helping the Trust understand and navigate governmental, legislative, budgetary, and policy developments that may affect its statutory funding mechanisms, other environmental funding streams, and the communities and partners it serves. The consultant will provide legislative monitoring, policy analysis, strategic communications support, stakeholder engagement, and relationship-building services to strengthen awareness and understanding of the Trust's mission, programs, impacts, and role in advancing environmental and community outcomes across Maryland.

The Chesapeake Bay Trust (the Trust) was established by the Maryland General Assembly and relies on dedicated revenue sources, including the Protect the Chesapeake and Coastal Bays license plate ("Bay Plate") and the Chesapeake Bay and Endangered Species Fund tax checkoff, to support conservation, restoration, environmental education, and community engagement throughout Maryland. These funding mechanisms provide critical unrestricted revenue that supports the Trust's ability to administer grant programs and leverage substantial additional public and private investments for Maryland's natural resources. The Trust seeks a qualified consultant or consulting firm with demonstrated experience in Maryland legislative affairs, government relations, stakeholder engagement, and strategic policy analysis to assist the Trust in monitoring, assessing, and understanding legislative, budgetary, and policy developments that could affect its existing statutory funding mechanisms and other environmental funding streams that support conservation, restoration, environmental education, and community initiatives across Maryland. The consultant will provide strategic counsel, legislative monitoring, policy analysis, relationship-building support, and strategic communications assistance to help ensure Trust leadership and trustees are informed about emerging issues, opportunities, and potential impacts relevant to the Trust's mission and funding model. Funding for this engagement is supplied by the Chesapeake Bay Trust.

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

Timeline: The anticipated contract period is December 1, 2026, through May 1, 2027, with the option to renew at the Trust's discretion.

2.1 Scope of Work – Introduction

The Chesapeake Bay Trust has experienced an increasing number of legislative proposals that could affect the effectiveness and long-term viability of its existing statutory funding mechanisms. While the Trust remains neutral regarding the merits of causes supported by other specialty license plates and tax checkoff programs, it has an institutional responsibility to understand and address developments that may

affect funding sources established by the General Assembly to support its mission. The selected consultant will provide strategic advisory services focused on preserving and supporting the long-term viability of the Trust's existing funding mechanisms and matters directly affecting the Trust's institutional duties. This engagement does not authorize a broader lobbying program. The consultant shall have no authority to establish legislative positions on behalf of the Trust and must operate within all applicable lobbying, ethics, registration, disclosure, and reporting laws.

2.2 Scope of Work – Deliverables.

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

Deliverable A: Legislative Monitoring and Strategic Analysis
Provide ongoing daily monitoring and updates regarding legislation, budget proposals, and related policy developments that may affect:

- The Chesapeake and Coastal Bays license plate;
- The Chesapeake Bay and Endangered Species Fund tax checkoff;
- Other existing Trust funding mechanisms;
- The Trust's statutory authorities and duties.
- Provide written and verbal assessments of emerging risks, opportunities, and recommended strategies.

Deliverable B: Strategic Counsel and Legislative Support
Provide strategic advice to the Trust President and Vice President of Communications and Advancement regarding:

- Legislative developments;
- Stakeholder engagement strategies;
- Relationship management;
- Strategies for responding to legislative and policy developments affecting Trust operations and funding mechanisms;
- Communications and messaging considerations.

Deliverable C: Meeting, Briefing, and Testimony Support
Assist Trust staff with:

- Preparation of testimony and informational statements authorized by the Trust;
- Issue summaries and background materials;
- Legislative briefing materials;
- Talking points;
- Meeting preparation materials;
- Strategic communications related to authorized legislative matters.

Deliverable D: Legislative Relationship Support
When specifically authorized by the Trust:

- Engage directly with legislators, legislative staff, and relevant stakeholders;
- Assist in maintaining productive relationships across caucuses and committees;
- Support constructive engagement regarding legislative and policy developments affecting the Trust's statutory funding mechanisms and institutional responsibilities.

Deliverable E: Coalition Coordination

Assist with coordination of appropriate information sharing and strategy discussions with nonprofit organizations, coalitions, and affiliated partners where authorized by the Trust and consistent with applicable laws and regulations.

Deliverable F: Reporting
Provide:
- Monthly activity summaries;
- Legislative session updates as needed;
- Provide a verbal report(s) to the Executive Committee of the Trust Board as requested
- Documentation of activities performed under the contract;
- Recommendations regarding future monitoring, engagement, communications, and strategic considerations.

Compliance with Applicable Laws. The selected consultant shall perform all services in compliance with applicable federal, state, and local laws and regulations. The consultant shall not represent themselves as speaking on behalf of the Chesapeake Bay Trust unless expressly authorized to do so by the Trust. Nothing in this solicitation or any resulting contract shall be construed as authorizing activities that are prohibited by law or inconsistent with Chesapeake Bay Trust policies. The consultant shall comply with all applicable federal, state, and local lobbying, ethics, registration, reporting, and disclosure requirements.

2.3 Qualifications and expertise
Offeror personnel assigned to perform under this Contract should possess the following qualifications:

Required
- Demonstrated experience working with the Maryland General Assembly, including legislative and budget processes, committee structure, and policymaker engagement.
- Demonstrated understanding of legislative, budgetary, regulatory, and policy development processes in Maryland.
- Established professional credibility and experience interacting with members of the Maryland General Assembly, legislative staff, Executive Branch agencies, and other governmental stakeholders.
- Demonstrated experience providing strategic policy analysis, issue assessment, governmental relations guidance, and executive-level advisory services.
- Experience monitoring and analyzing legislative, budgetary, and policy developments and communicating potential impacts to organizational leadership.
- Demonstrated ability to analyze proposed legislation, budget actions, and policy developments for potential organizational, operational, financial, and reputational impacts.
- Demonstrated experience advising organizations on issue management, stakeholder engagement, and strategic decision-making in governmental and policy environments.
- Experience providing strategic counsel in politically sensitive situations requiring diplomacy, discretion, stakeholder engagement, and relationship management.
- Strong written and verbal communication skills, including preparation of briefing materials, issue analyses, testimony support materials, meeting briefings, and strategic communications products.
- Knowledge of applicable Maryland lobbying, ethics, registration, disclosure, and reporting requirements.

- Ability to operate within narrowly defined client authorizations and represent organizational interests professionally, appropriately, and in accordance with applicable laws and regulations.
- Offeror shall demonstrate sufficient staffing capacity and resources to provide ongoing legislative monitoring, timely analysis, and responsive client support throughout the Maryland legislative session.

Preferred

- Offeror shall demonstrate a minimum of five (5) years of experience providing public affairs, government relations, legislative analysis, policy advisory, or related consulting services within Maryland.
- Experience working with environmental, conservation, nonprofit, public-sector, natural resource, or philanthropy-focused organizations.
- Experience supporting organizations whose funding mechanisms, authorities, programs, or revenue sources are established in statute.
- Experience working with organizations that receive and administer funding from multiple public and private sources.
- Experience managing cross-sector partnerships, coalition communications, and stakeholder engagement efforts.
- Familiarity with environmental funding programs, conservation finance, charitable organizations, specialty license plate programs, tax checkoff programs, or other dedicated revenue mechanisms.
- Access to and experience utilizing legislative tracking, monitoring, and policy intelligence platforms capable of conducting keyword searches, generating automated alerts, tracking legislation, monitoring committees, and producing legislative reports.

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	kwetzel@cbtrust.org
Address:	Chesapeake Bay Trust 108 Severn Avenue Annapolis, MD 21403

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

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

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

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

Offerors must submit proposals via email to Kwetzel@cbtrust.org no later than **4:00 p.m.** on **11/13/26** (the "**Closing Date**").
Proposals are irrevocable for 90 days following the Closing Date.

4.5 **Proposal Format**:

Narrative:

Applicants should address: 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 who will perform the work and number of years of experience in such areas
b) Description of the proposed approach for how to address the elements of the scope(s) of work 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 in Section 2.3,
d) Names, phone numbers, and email addresses of three references
e) The resume or CV of the individual(s) of proposed personnel
f) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

Budget:

The Offeror shall submit a detailed budget proposal that includes the total number of hours anticipated during the term of the Contract, hourly billing rates for personnel assigned to the engagement, an estimate of any direct expenses, and total compensation proposed. To the extent applicable, Offerors should identify the components of their pricing, including direct labor, fringe benefits, indirect costs, profit, and direct expenses. The budget shall clearly identify any additional costs necessary to complete the scope of work.

The proposed rates of compensation shall remain firm and irrevocable for a period of ninety (90) days from the Closing Date or, if modified during negotiations, for

a period of ninety (90) days from the date such modified rates are proposed by the Offeror.

Subcontracting Opportunities. It is assumed this solicitation will result in small procurements that will not provide realistic opportunities for subcontracting, though multiple organizations may apply as a collaborative or partnership with an identified project lead. If, however, an Offeror considers subcontracting of services to be available, they should so specify. Offerors are strongly encouraged to engage Disadvantaged/Minority 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:**
Not-for-profit and for-profit entities are eligible organizations.

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 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 from qualified Offerors will be evaluated by the technical review committee based on the criteria below. The Trust may also consider information obtained from references, interviews, oral presentations, and other sources during the evaluation process.

A. Proposed Team (20%)
Evaluation of the qualifications, experience, reputation, availability, and compatibility with the needs of the Trust of the individual(s) who will perform the Contract.

Consideration will be given to the team's experience with Maryland legislative and policy processes, stakeholder engagement, strategic communications, and governmental relations.

B. Proposed Approach (20%)

Evaluation of the Offeror's understanding of the Project and the quality, feasibility, and effectiveness of the proposed approach for accomplishing the Scope of Work. Particular consideration will be given to the proposed methodology for legislative monitoring, policy analysis, risk assessment, strategic communications, relationship management, and reporting.

C. Experience and Expertise of Offeror (25%)

Evaluation of the quality and relevance of the Offeror's experience and demonstrated expertise in:

- Maryland legislative and budget processes;
- Government relations and stakeholder engagement;
- Strategic policy analysis;
- Advising organizations on legislative, budgetary, and policy developments;
- Cross-caucus credibility, diplomacy, and relationship management;
- Supporting organizations with statutory funding mechanisms or other dedicated revenue sources.

References and demonstrated past performance will be considered.

D. Capacity and Resources (10%)

Evaluation of the Offeror's ability and commitment to provide timely, responsive service throughout the Contract period, including staffing capacity, availability, responsiveness, and access to legislative monitoring and policy intelligence tools.

E. Cost and Value (25%)

Evaluation of the proposed hourly rates, estimated hours, total compensation, reasonableness of costs, and overall value of services proposed in relation to the Scope of Work.

Total: 100%

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.

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 Contractor(s) must comply with billing procedures as may be required by the Contract Officer. 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."

6.10 **Data Privacy Policy:** The Trust has adopted a Data Privacy Policy to protect the privacy of individuals by establishing requirements governing the disclosure, use, sale, and redisclosure of personal information and geolocation data maintained, collected, or provided by

the Chesapeake Bay Trust (Trust). This Policy is intended to comply with Maryland State Government Article §10-1702. Applicants, awardees, and other interested parties can review the Policy here: https://cbtrust.org/wp-content/uploads/IT-001-001-Data-Privacy-Policy-Procedures-Final-July-2026.pdf