

## Chesapeake Bay Trust

### **REQUEST FOR PROPOSALS**

#### **CONSULTANT SERVICES TO SUPPORT AMERICORPS PROGRAMMATIC PLANNING – Landscape Assessment Due: May 1, 2024 at 4:00PM**

#### **SECTION I - INTRODUCTION**

##### **1.1 Purpose:**

The purpose of this Request for Proposals ("RFP") is to solicit a qualified contractor(s) to support a scope of work that will support the planning of a potential new AmeriCorps program, including conducting a landscape assessment of climate career and workforce programming within the state of Maryland.

#### **SECTION II – SERVICES/SCOPE OF WORK AND DELIVERABLES**

##### **2.1 Scope of Work – Introduction:**

The Chesapeake Bay Trust (Trust) is an independent, 501(c)(3) nonprofit grant-making organization dedicated to improving the watersheds of the Chesapeake Bay, Maryland Coastal Bays, and Youghiogheny River. Created in 1985 by the Maryland General Assembly, the organization's goal is to engage and empower diverse groups to take actions that enrich the natural resources and local communities of the Chesapeake Bay region.

With the most aggressive greenhouse gas (GHG) emission reduction goals in the nation, the State of Maryland will rely on an influx of early-career individuals trained and ready to step into mid- and senior-level climate focused jobs. To meet the increased need for these individuals, the Trust is working to develop a Climate Fellowship Program that would facilitate Fellows gaining the appropriate knowledge, certifications, and experience to apply and be selected for mid- to senior-level climate-related permanent employment. If operationalized, the Climate Fellowship program will enhance the growing pathways in the State of Maryland related to green workforce development, building off the success of the Chesapeake Conservation and Climate Corps program that the Trust has administered since 2010 and currently is in its 14<sup>th</sup> year.

To explore the feasibility of the Climate Fellowship Program, the Trust was awarded an AmeriCorps Planning Grant by Maryland Governor's Office on Service and Volunteerism (GOSV). The planning grant allows the Trust to explore and develop the Fellowship Program, develop robust evaluation methods, and explore how this Fellowship program fits into the existing workforce development programs in the State.

To support the planning award, and through this RFP, the Trust seeks a qualified contractor to conduct a landscape assessment of climate career and workforce programming within the state of Maryland to determine what mid- and senior-level climate-related opportunities exist in the region and what knowledge, certifications, and experience are necessary to be competitive candidates for these positions.

## 2.2 **Scope of Work – Maximum Bid and Timeline:**

Maximum bid: not to exceed \$15,000

Timeline: Work must be completed by August 1<sup>st</sup>, 2024

## 2.3 **Scope of Work – Deliverables:**

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

The Landscape Assessment contractor will lead an assessment of available climate related employment opportunities in the State of Maryland and an evaluation of the skills, training, and certifications necessary to be qualified for relevant climate-related positions.

- Deliverable A –Scope of Work Initiation
  - The contractor will initiate and hold a kick-off meeting to include the contractor, Trust point of contact, and advisory group for this scope of work.
  - The contractor will propose the overall project methodology and approaches to data collection and the essential components of the collected data. The contractor will incorporate methodologies and approaches used in similar studies throughout the States (existing relevant studies to be researched by the contractor). The contractor will work with the Trust to determine and refine final methodologies and approach.
  - The contractor will develop a draft structure for a database/table of mid- and senior-level climate-career and workforce programming and relevant skills, trainings, and certifications necessary to obtain/participate in those careers and programs in the state of Maryland using excel, google sheets, or similar tool.
- Deliverable B – Data Collection
  - The contractor will identify and collect information about providers that have mid- and senior-level climate-related opportunities as determined in Deliverable A via surveys, focus groups, interviews, desktop research, and/or other methods also as identified in Deliverable A.
- Deliverable C - Data Analysis
  - The contractor will conduct an analysis of the information gathered provided through written documentation and/or visualizations, if including graphics help convey the information, (Word or other appropriate format) and present initial findings to the Trust point of contact.
- Deliverable D – Draft Final Report
  - The contractor will develop a draft of the final report in PDF format, detailing the methodologies, a summary of the data collected, the results of the data analysis, and key recommendations for advancing the Trust’s interest in gaining an understanding of the programs and pathways that support individuals looking to access mid- and senior-level climate-related positions in the state of Maryland. A gap analysis should also be included in the report to define what might be missing.
- Deliverable E – Final Report
  - The contractor will develop a final report based on the draft submitted as Deliverable D that incorporates Trust feedback.

### **Section III. OFFEROR'S MINIMUM QUALIFICATIONS**

#### Qualifications and expertise

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

- Demonstrated experience with conducting social science research and/or landscape analyses that assess system strengths and gaps; development of reports and tools to support communications and programmatic decision making;
- Knowledge of climate jobs and the career/workforce training best practices and policies; and
- Proficiency with stakeholder outreach, conducting interviews, written and graphic product development (experience in graphic design and/or data visualization).

### **SECTION IV – 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 V - PROPOSAL FORMAT AND SUBMISSION INFORMATION**

#### **5.1 Principal Solicitation Officer and Issuing Office:**

Contract Officer: Emily Stransky  
Telephone Number: 410-974-2941 x101  
E-Mail: estransky@cbtrust.org  
Address: Chesapeake Bay Trust  
60 West St., Suite 405  
Annapolis, MD 21401

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

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

**5.3 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.

#### **5.4 Submission Instructions/Proposal Closing Date:**

Offerors must submit proposals using our Online Application System, located at:  
<https://us.grantrequest.com/application.aspx?sid=1520&fid=35341> no later than **4:00 p.m.** on **May**

**1<sup>st</sup>, 2024 (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 5.1.

Proposals are irrevocable for 90 days following the Closing Date.

## 5.5 **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 III,
- 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](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.

**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 Proposer 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.

- 5.6 **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.

- 5.7 **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 VI - EVALUATION PROCEDURE**

- 6.1 **Qualifying Proposals:** The Contract Officer will review each proposal for compliance with the minimum qualifications set forth in "Offeror's Minimum Qualifications."
- 6.2 **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.
- 6.3 **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.
- 6.4 **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) **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 VII: OTHER INFORMATION**

- 7.1 **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.
- 7.2 **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.
- 7.3 **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).
- 7.4 **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.
- 7.5 **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.
- 7.6 **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.
- 7.7 **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.
- 7.8 **Billing Procedures and Compensation.**
- A. **Method.** The Contracts to be entered into as a result of this RFP will not exceed the small procurement threshold fixed at 41 U.S.C. 403 (11) (currently \$250,000.) The Contractor(s)

must comply with billing procedures as may be required by the Contract Officer and AmeriCorps. 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.

7.9 **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."

7.9 **Branding.** All products (outreach materials, events) will be branded with AmeriCorps and Trust logos.

**RFP Revision (4/16/2024):** An earlier version of the RFP had the closing date as May 1, 2025 and the timeline for the scope of work ending in August 1, 2025. The correct closing date is May 1, 2024 and work must be completed by August 1, 2024.