

## Chesapeake Bay Trust

# **REQUEST FOR PROPOSALS**

## **CONSULTANT SERVICES FACILITATOR SERVICES BURNOUT TRAINING SESSION**

### **SECTION I - INTRODUCTION**

1.1 **Purpose:** The purpose of this Request for Proposals (“RFP”) is to design and facilitate a virtual, 90-minute, interactive training on burnout for approximately 15–20 network leaders through the Regional Capacity Building Initiative (RCBI) of the Chesapeake Bay Funders Network’s Capacity Building Initiative. The session will focus on structural and systems-level solutions that collaborative networks can implement to distribute responsibility more equitably, reduce over-reliance on a few individuals, and sustain engagement over time. Funding is supplied by the Chesapeake Bay Funders Network (CBFN).

#### Anticipated Calendar for this Procurement

<b>Milestone</b>	<b>Date</b>
RFP Closes (4:00 p.m. ET)	March 3, 2026
Applicants Notified of Selection	March 6, 2026
Planning Meeting	March 9 or 10, 2026
Run-Through / Technical Rehearsal	March 16 or 17, 2026
Live Training Session	March 19, 2026 (3:00–4:30 p.m. ET)
Summary + Resource Pack Due	Within 10 business days after the training
Office Hours for Network Leads	Within 30 days after the training

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

Timeline: Work must take place between March 6, 2026 and May 1, 2026. Contingent upon funding availability, the timeline may be extended to support an additional two years of facilitator work. The Trust will notify the contractor by the end of the period of performance if additional facilitator services in subsequent years will be requested as part of this contract.

a. **Scope of Work – Introduction**

The Regional Capacity Building Initiative, a program of the Chesapeake Bay Funders Network’s Capacity Building Initiative, supports five cross-sector networks of nonprofits across the Chesapeake Bay Watershed that work at the intersection of community and environmental health.

The Trust seeks a facilitator to deliver a training focused on systems-level solutions to burnout in networks, moving beyond individual self-care to address structural contributors such as role ambiguity, urgency culture, invisible labor, and bottlenecked decision-making. Participants include leaders who hold significant organizational responsibilities while also serving in network governance, working groups, and collaborative initiatives.

We are particularly interested in movement-tested approaches that help networks distribute leadership, normalize “step forward / step back” participation, and reduce extraction from highly committed individuals.

### **Expected Participant Outcomes**

Participants will:

- Understand structural drivers of burnout in networked work
- Learn practical, structural approaches to share responsibility and reduce burnout
- Identify 3–5 actionable pilot ideas to test in their networks
- Feel validated and energized by examples from networked movements

This virtual training will be held on **March 19, 2026, from 3:00–4:30 p.m. ET.**

#### **b. Scope of Work – Deliverables.**

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

- Deliverable A – Session Design
  - Develop the following materials:
    - Learning objectives
    - Draft agenda
    - Facilitation notes
  - These materials should include the following components:
    - Structural burnout framing
    - Interactive components
    - Reflection and application time
    - Real world examples from relevant movements, coalitions, or networks
    - Practical, systems level tools such as:
      - Shared or rotating leadership models
      - Clear decision-making structures
      - Workload visibility practices
      - Cadence/scope/boundary setting techniques
      - “Step back / step forward” participation norms
- Deliverable B – Planning and Live Facilitation
  - The contractor will:
    - Participate in a 45-minute planning meeting.
    - Participate in a 30-minute run through/technical rehearsal.
    - Facilitate a 90-minute virtual training session for approximately 15–20 network leaders on March 19, 2026 from 3:00PM-4:30PM.
- Deliverable C – Summary & Resource Pack (within 10 business days)
  - A 2–3 page summary of key concepts and insights from the session
  - Tools, templates, or checklists shared
  - A list of first step pilots networks can test within 30–60 days
  - Links/citations for movement/network examples

- Deliverable D – Office Hours + Reflection (within 30 days)
  - The contractor will:
    - Provide 60 minutes of virtual office hours for network leads within 30 days after the session
      - May be delivered as one group session or multiple short 1:1 or small-group sessions
  - Support participants in applying tools and concepts to their networks
  - Synthesize lessons learned from both the training and office hours, including participant feedback, recurring needs, and emerging themes
  - Provide recommendations for future network trainings, based on observed gaps, interests, and engagement patterns
  - Provide recommendations for next steps tailored to network contexts

c. Qualifications and expertise

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

- Experience delivering interactive virtual trainings (required): At least 3 sessions with demonstrated formal curriculum in the past 5 years;
- Expertise in systems-level approaches to burnout (required);
- Experience facilitating networks/coalitions (preferred);
- Experience with equity-centered or trauma-informed facilitation (preferred);
- Familiarity with environmental/community networks (preferred); and
- Experience developing simple, usable tools (preferred).

### **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: Amber Cameron  
Telephone Number: 410-974-2941 x124  
E-Mail: acameron@cbtrust.org  
Address: Chesapeake Bay Trust  
108 Severn Ave  
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 the Trust’s Online Application System, located at:

<https://us.grantrequest.com/application.aspx?sid=1520&fid=35958>

no later than **4:00 p.m. ET on Tuesday, March 3<sup>rd</sup>, 2026** (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.** 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.

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 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 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.

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 **Branding:** All products (outreach materials, events) will be branded with Chesapeake Bay Funders Network and Trust logos.