

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONSULTANT SERVICES

Independent Evaluation of the Capacity Building Initiative Annual Grant Program

SECTION I - INTRODUCTION

1.1 Purpose

The purpose of this Request for Proposals (RFP) is to solicit an independent evaluation of the annual Organizational Capacity Building Grant Program, a core component of the Capacity Building Initiative. The Initiative is an effort of the Chesapeake Bay Funders Network and is administered by the Chesapeake Bay Trust. The evaluation will assess the program's effectiveness in advancing outcomes of the Chesapeake Bay Agreement. Funding for this work is provided by the U.S. Environmental Protection Agency (EPA).

1.2 Background

The Chesapeake Bay Trust administers the Capacity Building Initiative on behalf of the Chesapeake Bay Funders Network to strengthen the organizational effectiveness of nonprofit partners advancing watershed restoration and conservation initiatives across the Chesapeake Bay region. Through targeted investments in core capacities categories including leadership, adaptive, management, and technical, the Initiative enables awardees to operate more efficiently, effectively, and sustainably. The ultimate goal is to equip organizations to deliver stronger, higher quality restoration and conservation outcomes over time.

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

2.1 Scope

Maximum bid: Bids not to exceed \$150,000

Timeline: Work must be completed by June 30th 2027

a. Scope of Work – Introduction:

The selected Contractor will design and implement an independent, third-party evaluation of the Organizational Capacity Building Grant Program, covering awards made between 2015 and 2025. Approximately \$6.45M in funding was awarded through 250 grants to 135 unique organizations during this time. The evaluation will assess how capacity-building investments contribute to measurable restoration and conservation outputs and outcomes aligned with the Chesapeake Bay Agreement. The Contractor will be expected to generate both quantitative and qualitative evidence of contribution, correlation, or other defensible linkages between organizational capacity and restoration outputs. Findings from the evaluation will support

learning and continuous improvement for the program, inform future investment strategies, and help articulate the value of capacity building as a tool for advancing Chesapeake Bay restoration goals.

The Trust has drafted a set of questions for this evaluation. The Contractor will be responsible for finalizing the evaluation with the Trust's feedback and approval. The Contractor shall propose an evaluation design that clearly articulates rigorous and appropriate methods for addressing the evaluation questions, including quantitative analyses that assess the relationship between capacity building investments and measurable Chesapeake Bay restoration outcomes. The evaluation shall include both quantitative and qualitative measures.

Primary Evaluation Objectives in Priority Order:

- Assess the relationship between capacity-building investments and restoration-related outputs and outcomes, including scale, quality, durability, and implementation performance.
- Categorize, quantify, and qualify changes in organizational capacity among awarded organizations over time.
- Identify mechanisms of influence, such as staffing stability, partnership development, fundraising leverage, or improved project delivery.

Secondary Evaluation Objectives:

- Examine contextual factors that may strengthen or limit the influence of capacity investments.
- Produce actionable insights to inform program improvement and future investment strategies to maximize restoration-related outcomes.

The Selected Contractor will refine draft evaluation questions with Trust staff:

- i. To what extent is participation in the Organizational Capacity Building Grant Program associated with changes in restoration-related outputs and outcomes (e.g., quantity, scale, quality, durability) following receipt of capacity building support?
- ii. What measurable changes in organizational capacity occurred among awarded organizations, and how do those changes relate to subsequent restoration performance or results aligned with the Chesapeake Bay Agreement?
- iii. Through what mechanisms do capacity building investments influence restoration outcomes (e.g., project delivery, fundraising leverage, staffing stability, partnerships), and which types of capacity investments are most strongly associated with improved restoration results?
- iv. How do restoration-related outcomes for awarded organizations change over time, and what contextual factors strengthen or limit the influence of capacity building investments?

The Trust will provide the Contractor with the following data and information to be used in the evaluation. The Offeror is expected to propose additional data collection as part of the scope of work.

- i. **Master list of awarded projects (2015-2025)** including organization name, project title, awarded amount, and project abstract.
- ii. **Pre and Post Marguerite Casey Organization Capacity Building Assessment data** for a subset of awarded organizations.
- iii. **Final reports submitted by awardees**, including narrative descriptions of capacity building activities, organizational changes, and self-reported outcomes.
- iv. **Contact information of awarded organizations** for follow-up data collection.
- v. Additional internal documentation as relevant.

Important note: These data were not originally collected for longitudinal evaluation of restoration outputs and outcomes. Participation in certain data collection efforts varies across organizations and years.

Offerors are therefore expected to propose additional data collection methods, data sources, or analytical approaches as needed to address the evaluation questions and to generate quantitative evidence related to restoration outcomes.

Offerors should describe how available and proposed data sources will be used to generate quantitative evidence of the extent to which capacity building investments contribute to or are associated with restoration-related outputs and outcomes (e.g., project implementation, scale, performance, or longevity). While the Trust recognizes the inherent challenges in attributing restoration outcomes directly to capacity investments, the evaluation design should include appropriate methods to assess contribution, correlation, or other defensible linkages grounded in quantitative data.

- b. Scope of Work – Deliverables:** Offerors must outline in detail their ability to perform in timely fashion the following services:
- i. Monthly summaries of progress and key milestones to the Trust.
 - ii. Final evaluation questions, approved by the Trust staff.
 - iii. Proposed evaluation design which must include a) methods for generating quantitative evidence of contribution or association, b) approaches to analyzing changes in organizational capacity over time, and c) approaches to linking capacity changes to restoration outcomes (e.g., regression, matched comparisons, contribution analysis, time-series analysis, or other defensible methods). The final methods are expected to be refined based on Trust staff feedback before implementation.
 - iv. Draft report including raw data, evaluation results, interim findings and recommendations with specific attention to quantitative evidence of restoration-related impacts, for review by the Trust.
 - v. Final evaluation report incorporating Trust’s feedback and including a) an executive summary, b) description of the methods and limitations, c) quantitative and qualitative findings, d) description of the mechanisms of influence, e) case examples, and f) recommendations for program improvement.
 - vi. Presentation in graphic format to accompany the report, highlighting key findings and recommendations.

- vii. Recommendations to the Trust on ongoing data collection and analysis to improve future evaluation efforts.
- viii. Deliver 2-3 presentations coordinated by Trust staff.

2.2 Qualifications

- a. **Qualifications and expertise:** Offeror's personnel assigned to perform under the Contract should have the following experience:
 - i. The Lead Evaluator should have a minimum of 10 years of experience in evaluation study design and implementation, including demonstrated experience using the research methods proposed for this evaluation.
 - ii. The proposed team's prior work should include evaluations of grantmaking programs, preferably in environmental, natural resource, or organizational capacity contexts.
 - iii. Expertise in organizational development and capacity building.
 - iv. Demonstrated ability to analyze and synthesize both quantitative and qualitative data, including administrative grant data, retrospective program records, and self-reported information to link organizational capacity to program outcomes.
 - v. Ability to work with incomplete or heterogeneous datasets.
 - vi. Demonstrated expertise in presenting complex findings clearly and concisely to non-technical audiences, both in writing and verbally.
 - vii. Demonstrated ability to adhere to contract timelines and budgets.
 - viii. Experience conducting evaluations or assessments that involve data collection from individuals (e.g., interviews, surveys, focus groups), including knowledge of ethical considerations, informed consent, confidentiality, and responsible data management.

SECTION III – ADDITIONAL SERVICES

3.1 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.

3.2 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 our Online Application System, located at:

<https://us.grantrequest.com/application.aspx?sid=1520&fid=35735>

no later than **4:00 p.m.** on **Thursday April 30th** (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

- a. **Narrative:** You will be asked to submit a narrative. Each proposal must include responses to i. – iii. in a concise (≤5 pages) description. Items iv. – vii. 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.
 - i. Names of individuals providing the services and number of years of experience in such areas
 - ii. The individual's proposal for how to address the elements of the scope(s) of work including:
 - Proposed evaluation design and rationale
 - Data collection plan
 - Analytical methods (quantitative and qualitative)
 - Anticipated challenges and mitigation strategies
 - Timeline and milestone
 - iii. Response to the qualifications section: a description of the experience to provide services in the topics described above as described in Section 2.2,

- iv. Names, phone numbers, and email addresses of three references
- v. The resume or CV of the individual(s) providing the service
- vi. A sample report on a similar topic prepared by the proposed team
- vii. Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

- b. 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 15% 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.
- c. 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, 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 Unique Entity ID (UEI) number to the Trust. The federal government has transitioned from a DUNS (Dun & Bradstreet) number to a UEI.

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 2.1.
- 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 the Environmental Protection Agency (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 \$350,000.) The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and EPA. These may entail monthly reporting of time and eligible expenses, or may be based upon satisfactory completion of benchmark tasks.
- b. **Records:** The Contractor(s) shall submit invoices 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 EPA and Trust logos.

6.11 Geospatial Data

If you are spending federal funding on collecting geospatial data (anything associated with mapping to a point on the planet represented by geographic coordinates (latitude and longitude)), a reminder that you need to follow requirements associated with the Geospatial Data Act of 2018 (GDA). <https://www.fgdc.gov/gda>.

- a. You have most likely sent the Trust latitude and longitude of your project, which technically counts as "geographic data." You may find yourself refining this location information as you progress with the project, technically *after* you received the federal funding and so therefore with this federal funding. In theory, just the act of gathering (or refining) one set of latitude and longitude data falls under the jurisdiction of the Geospatial Data Act. To make sure you are 100% compliant with the GDA in this case, if you find yourself refining the original lat/long data you sent to the Trust about your project location, create a separate file (e.g., a word document), which will be called your "metadata" file ("metadata" just means a detailed description of your data, explaining what they are, where they came from, how they were created, and how they can be used) that includes (you can copy and paste the below):
 - i. What the data is about (e.g., your Trust project location)

- ii. The location covered (e.g., an address or general location)
- iii. When the data was collected (e.g., the date you looked it up on Google Earth)
- iv. How the data was collected (e.g., you clicked on a location in Google Earth and it revealed the coordinates)
- v. Any quality checks you did (e.g., you did a second check to make sure it mapped to the right location)
- vi. Your name and contact information
- vii. How the data can be used (e.g., in a list of project locations collected by the Trust at www.cbtrust.org/impact)