



**Chesapeake Bay Trust**

## **REQUEST FOR PROPOSALS**

### **CONSULTANT SERVICES**

#### **Support of the 2025 Environmental Literacy Forum Civic Engagement Training**

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

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to engage a contractor to support the 2025 Environmental Literacy Forum (the Forum) through the planning and facilitation of a Civic Engagement training, in partnership with the Chesapeake Bay Trust, Regional Outdoor Learning Network Initiative Network Advisory Team, National Oceanic and Atmospheric Administration (NOAA), and Chesapeake Bay Program Education Workgroup (the Environmental Literacy Forum Planning Partners). The work to be supported will advance outcomes from the Chesapeake Bay Agreement.

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

2.1 **Scope:**

Maximum bid: Bids not to exceed **\$20,000 (Amended)**

Timeline: Work must occur between October 1, 2024 and March 1, 2025

a. Scope of Work – Introduction

Every two years, the Forum Planning Partners (listed above in section 1.1) coordinate an Environmental Literacy Forum, which brings together leaders in the formal and non-formal environmental literacy field from Chesapeake Bay watershed states. The Forum focuses on advancing practitioner knowledge and skills to support the conditions to realize [environmental literacy goals and outcomes](#). Some of the goals of the upcoming Forum are to 1. Increase the knowledge and skills of networks and environmental literacy partners on how they can engage and activate school system decision-makers to reach an ultimate goal of sustainable funding for environmental literacy programming, 2. Share best practices in civic engagement and community organizing efforts, and 3. Provide guidance on increasing self-efficacy for effective stakeholder education and engagement.

The Forum will take place on January 7<sup>th</sup> through 9<sup>th</sup>, 2025 at the National Conservation and Training Center (NCTC) in Shepherdstown, West Virginia. It is anticipated that approximately 150 attendees will be present. Additionally, a virtual follow-up Forum is anticipated to take place in February 2025 that will provide a recap of Forum outcomes and topics covered.

The Trust and partners seek a contractor who will provide an engaging and interactive two day (~12 hour) training on civic engagement during the Forum in order to meet the goals of the upcoming Forum.

b. Scope of Work – Deliverables.

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

- Deliverable A – Submission of a written summary of the contractor’s participation in bi-weekly meetings (8-12 meetings anticipated, 90 minutes each) to plan the Forum and follow-up virtual Forum. Planning meetings are anticipated to take place between October 1, 2024 and February 31, 2025.
- Deliverable B – Submission of a detailed draft training curriculum on civic engagement for Forum participants, including anticipated timeframes, goals, outcomes, and activities.
- Deliverable C – Submission of a finalized training curriculum, incorporating feedback from the Forum Planning Partners.
- Deliverable D – Submission of a draft curated set of civic engagement resources for Forum participants and the environmental literacy community for use in engaging the K-12 education system. The types of resources created will be based on input from the Forum Planning Partners.
- Deliverable E – Submission of a finalized curated set of civic engagement resources, as outlined in Deliverable D, incorporating feedback from Forum Planning Partners.
- Deliverable F – Submission of a summary of the successful facilitation of an engaging and interactive 2 day (~12 hour, January 7-9, 2025) training on civic engagement, with a focus on engaging and activating school system decision-makers to reach an ultimate goal of sustainable funding for environmental literacy programming, during the 2025 Environmental Literacy Forum at NCTC in Shepherdstown, West Virginia, including all materials and presentations used. Note: Ample support for breakout sessions will be provided to support the number of attendees.
- Deliverable G – Submission of a summary of a separate training at a virtual follow-up Forum (anticipated to take place in February 2025), including all materials, presentations, and a recording of the training. This streamlined version of the more expansive civic engagement training that took place at the in-person Forum would cover a summary of the Forum topics, and is anticipated to be approximately 2 hours.

c. Qualifications and expertise

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

- Expertise (required);
  - Experience designing and delivering civic engagement training courses for professionals using multiple instructional methods – experience should include having facilitated at least three trainings with demonstrated formal curriculum over the past five years;
  - Experience facilitating and leading trainings for large audiences;
  - Familiarity with local government and K-12 school system budget development and allocation in the United States; and
  - Experience engaging local decision makers that influence the K-12 education space (superintendents, school boards of education, municipal and local government officials, etc.).
- Expertise (preferred);
  - Familiarity with K-12 school system priorities, and
  - A background engaging and working with diverse audiences (such as varying school district sizes, geography, socio-economic factors, and demographics).

## 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: Emily Stransky  
Telephone Number: 410-974-2941 x101  
E-Mail: Estransky@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 using our Online Application System, located at: <https://us.grantrequest.com/application.aspx?sid=1520&fid=35343> no later than **4:00 p.m. on September 16, 2024 (Amended)** (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. Indirect rates may not exceed 10% of the direct costs. Note: lodging at NCTC January 6<sup>th</sup> and 7<sup>th</sup> will be covered by the Forum organizers. Additionally, dinner January 6<sup>th</sup>, breakfast, lunch and dinner January 7<sup>th</sup>, and breakfast and lunch January 8<sup>th</sup> will be cover by the Forum organizers. These costs do not need to be included in the Offerors budget. If meals, travel, and lodging costs are required for the Offeror outside of this, they should be included in the budget (should the Offeror like to request funding towards those items).

**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, 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.

**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.
- 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 \$250,000). 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."
- 6.9 **Branding:** All products (outreach materials, events) will be branded with Trust, NOAA, and CBP logos.