

## **Chesapeake Bay Trust**

# **REQUEST FOR PROPOSALS**

## **CONSULTANT SERVICES FACILITATOR FOR A “GREEN STREETS” FORUM**

### **SECTION I - INTRODUCTION**

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to facilitate a day long workshop focused on green infrastructure innovations for Chesapeake Bay municipalities and communities through the U.S. Environmental Protection Agency as part of the in the Green Streets - Green Towns - Green Jobs award program. The work to be supported will advance outcomes from the Chesapeake Bay Agreement. The Funding is supplied by U.S. Environmental Protection Agency Region III.

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

Timeline: Work is anticipated be completed by December 31, 2019

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

The [Chesapeake Bay Green Streets - Green Towns - Green Jobs award program](#) helps communities develop and implement plans that reduce stormwater runoff, increase the number and amount of green spaces in urban areas, improve the health of local streams and the Chesapeake Bay, and enhance quality of life and community livability. This work is intended to facilitate and encourage communities’ integration of green techniques into traditional gray infrastructure projects.

This collaborative effort supports implementation of the [Chesapeake Bay Protection and Restoration Executive Order](#) and serves as a key component of EPA’s Green Streets - Green Jobs - Green Towns (G3) Partnership. The G3 Partnership provides support for local, grassroots-level greening efforts to reduce stormwater runoff from towns and communities in urbanized watersheds. All communities in Maryland and throughout the Chesapeake Bay watershed portions of Delaware, Pennsylvania, Washington D.C., West Virginia, and Virginia are part of the Chesapeake Bay G3 Award Program.

A forum will be held in Fall of 2019, in a to be determined Chesapeake Bay watershed location that is centrally located for attendee’s participation. The purpose of this forum is to highlight the G3 award program as a resource for design and implementation for green infrastructure practices and to showcase success stories from past G3 awardees. Past G3 awardees will share their projects in order to demonstrate to the audience how the G3 program can be used in their own community/municipality. The forum will provide innovative ideas for the attendees’ stormwater solutions, facilitate discussion among the attendees (e.g., municipalities aiming to reduce pollution to meet local, state, and/or federal requirements), provide potential additional funding sources, and introduce a future G3 summit where select communities (e.g., five) will work with experts to develop tailored planning tool(s) that further green infrastructure for them. It is anticipated that between 30 and 50 participants will attend this event.

The facilitator will be responsible for working with the US EPA Region III and Chesapeake Bay Trust to

finalize the agenda and advertise the event. The facilitator will take the lead for organizing and facilitating the forum and developing a written report documenting the forum event to include lessons learned and potential next steps for widespread green infrastructure implementation in the Chesapeake Bay watershed.

The facilitator will:

1. Assist the US EPA Region III and the Chesapeake Bay Trust in development of the vision for the day and learning objectives
2. Assist the US EPA Region III and the Chesapeake Bay Trust in development of the agenda
3. Assist the US EPA Region III and the Chesapeake Bay Trust in attendee advertisement strategy
4. Secure a meeting location and provide lunch/light refreshments
5. Coordinate presentations to include preparing speakers for the forum (sharing the agenda, goal/vision for the day, speaking format and time allotted, etc.), reviewing speaker presentations, and compiling speaker presentations
6. Develop meeting materials to use/distribute at the forum, e.g., agenda, speaker biographies, compiling speaker presentations, forum learning objectives, and/or additional supporting materials for the forum attendees
7. Attend meetings/conference calls for forum planning (1 through 5 above) and develop meeting notes with action items to share with the US EPA Region III and the Chesapeake Bay Trust within one week of the meeting/conference call
8. Facilitation of the forum to include setting up the meeting room, conducting the registration, distributing meeting materials, introducing speakers, facilitating discussions, summarizing the forum for the audience to include outlining next steps, breaking down the meeting space and returning any equipment after the meeting ends, and taking notes during the forum
9. Organize and attend a meeting/conference call with the US EPA Region III and the Chesapeake Bay Trust to discuss the forum and outline the next steps for the draft report
10. Compile a draft report of the forum to include the highlights of the forum, lessons learned, major themes, and potential next steps for widespread green infrastructure implementation in the Chesapeake Bay watershed.
11. The US EPA Region III and the Chesapeake Bay Trust to provide one set of comments/edits
12. Organize and attend a meeting/conference call with the US EPA Region III and the Chesapeake Bay Trust to review/discuss their (the US EPA Region III and the Chesapeake Bay Trust) comments/edits
13. Edit the report per the US EPA Region III and the Chesapeake Bay Trust comments/edits to provide the final report/deliverable

## 2.2 Scope of Work – Deliverables.

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

- Deliverable A – The following deliverables will be provided to the US EPA Region III and the Chesapeake Bay Trust one week prior to the Forum:
  - Copies of meeting/call notes and action items.
  - The forum agenda, vision for the day, and learning objective(s).
  - A written plan for the speaker invitation strategy, attendee advertisement strategy, preparing speakers, developing meeting materials, setting up the meeting room, conducting the registration, distributing meeting materials, introducing speakers, facilitating discussions,

providing lunch/light refreshments, summarizing the forum for the audience to include outlining next steps, breaking down the meeting space and returning any equipment after the meeting ends, and taking meeting notes.

Deliverable A includes 2.1 Scope of Work items # 1 through #7.

- Deliverable B – The following deliverables will be provided to the US EPA Region III and the Chesapeake Bay Trust:
  - all final meeting materials to include the agenda, attendee list (to include the name, organization, email, and city/state), speaker presentations, forum notes, additional meeting final products and
  - post-forum meeting/conference notes with the US EPA Region III and the Chesapeake Bay Trust.
- Deliverable C – The following deliverable will be provided to the US EPA Region III and the Chesapeake Bay Trust:
  - final report addressing comments/edits from the US EPA Region III and the Chesapeake Bay Trust and approved by the US EPA Region III and the Chesapeake Bay Trust

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

#### Qualifications and expertise

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

- Expertise or Experience A (required): Experience developing curriculum for professional training courses and delivering training programs in watershed restoration topics
- Expertise or Experience B (required): Experience delivering training programs in watershed restoration topics
- Expertise or Experience C (required): Demonstrated ability for organization and communication skills needed to plan and implement a conference workshop and/or training program
- Expertise or Experience D (required): Experience developing a final reports/final products from a conference workshop and/or professional training
- Expertise or Experience E (required): Proficiency in Microsoft Office suite of software tools (Word, PowerPoint, Excel)
- Expertise or Experience F (preferred): Experience with stormwater management to include stormwater retrofits such as “green infrastructure” practices in the Chesapeake Bay watershed.

## SECTION IV – ADDITIONAL SERVICES

Amount Available: It is anticipated that as a result of this procurement action, a contract amendment would be issued for a second meeting (summit) held within a year of the forum and would be awarded as an amendment to this contract of up to \$10,000.

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: Sadie Drescher  
Telephone Number: 410-974-2941 105  
E-Mail: sdrescher@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.

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://www.GrantRequest.com/SID\\_1520?SA=SNA&FID=35341](https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35341) no later than **4:00 p.m. on July 15, 2019** (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**: Each proposal (i.e., a submission in response to each scope of work) must include responses to a-d in a concise ( $\leq 5$  pages) description. Item e) is a budget spreadsheet that is uploaded into the online application. Items f) and g) 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 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.** Please use the budget form provided in the on-line application 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.
- f) The resume or CV of the individual(s) providing the service
- g) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

**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. **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 \$150,000). The Contractor(s) must comply with billing procedures as may be required by the Contract Officer and

U.S. Environmental Protection Agency. 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."

7.95 **Branding.** All products (outreach materials, events) will be branded with the U.S. Environmental Protection Agency and Trust logos.