



REQUEST FOR PROPOSALS (RFP)

CONTRACTUAL SERVICES

“Green Capital Project Technical Assistance Navigator”

Proposal Deadline: December 1, 2025

SECTION I – INTRODUCTION

Several funders in the Baltimore/Chesapeake region support green/sustainable building practices and capital projects for their public and not-for-profit partners. These include: renewable energy, green building envelope practices and materials, and greening the landscape of the properties (e.g., stormwater and habitat practices). Many of these practices are relatively new and it may be the first time an architect, engineer, or contractor has worked with them. In this way, funding such green practices has two benefits: 1) environment/climate change mitigation, and 2) new tools and practices for construction and built environment firms.

As with many design and construction projects, but particularly with relatively new green practices, unforeseen issues arise in both the project concept and project implementation stages that cannot always be solved with the grantees’ architects and engineers (A&E) and/or contractors. Grantees often need outside help navigating these challenges. Examples of such challenges include determining which green practices to include in a project; bidding, procurement, and permitting snags, especially when working in a relatively new practice; and differences of opinion between A&E firms and contractors on implementation of new green practices.

The France-Merrick Foundation (FMF) and the Chesapeake Bay Trust (the Trust) are partnering to provide “technical assistance navigator services” for a suite of their grantees. This support is meant to help grantees who are planning major green capital investments or who are working through barriers that have stymied projects to get them back on track. In this way, funding partners aim to make green capital work more accessible, affordable and less frustrating. This concept grew from a similar effort developed by the William Penn Foundation for their capital grantees.

SECTION II – SERVICES/SCOPE OF WORK AND DELIVERABLES

- 2.1 **Purpose of this RFP (Your Work):** The purpose of this Request for Proposals (RFP) is to identify an entity who can serve as a “navigator” for FMF and Trust grantees who have hit snags or would benefit from technical expertise in their projects with idea conceptualization, design, permitting, bidding, procurement, and implementation. This navigator will directly support grantees who have received awards to implement projects to green their grounds (stormwater treatment via rain gardens, bioretention cells, rain barrels, tree planting, bioswales, pervious pavements, etc.), green their buildings (e.g., green building materials, energy efficiency improvements, green roofs,

envelope, etc.), green their resources use (e.g., graywater or blackwater systems), or green their energy production/consumption (e.g., solar energy systems, geothermal energy systems, wind energy systems).

The navigator is not expected to replace the A&E function of a project or to become a full “owner’s rep” for the duration of a project, but rather will complement and provide advice, often a second or third opinion, on a discrete component of the work that is serving as a barrier to making progress on an overall green capital project.

Navigator support for a grantee is expected to be on the scale of <40 hours and < 1 month in duration per grantee challenge. It is expected that the navigator may be able to help approximately half of the grantees, but because no individual or entity is an expert in all topics, will likely need to bring in outside paid (or pro bono) expertise on ~30-50% of the topics. Based on the William Penn Foundation model for similar services referenced above, we estimate that outside expertise would cost approximately \$150 per hour, a number that should be used in crafting a budget for the work.

Specific examples of types of guidance the Navigator might be called upon to provide include but are not limited to:

- Identifying green capital components of a project;
- Crafting language for scopes of work that can be used in bid/procurement documents to ensure bidders know what work exactly the grantee wants to accomplish and the exact climate goals the grantee has (e.g., percentage energy expected to be achieved via solar or net zero goals or whether constraints exist for HVAC).
- Analyzing and comparing bids once they are received.
- Working through situations in which elements of a design cannot be built as intended and adaptive management decisions need to be made to adjust.
- Working through situations in which costs are higher than expected, either at the bid phase (so value engineering is needed) or due to change orders during construction, especially in situations in which the green elements are at risk of being eliminated or reduced for cost reasons.
- Helping find a third (or fourth+) opinion on a discrete component of the overall project when the path forward isn’t clear due to differences in opinion between, for example, the architect’s team and contractor’s team, or two subcontractors working on related topics.

The first year of this work will be a pilot year, which will be used to determine whether the program should continue and if so, how to improve it in the future.

2.2 **Deliverables:** Awards will be managed as firm-fixed-price contract or grant. We anticipate making one award for \$100,000. Offerors must outline in detail their ability to perform within one year the following deliverables:

- 1) Project preparation:
 - a. Naming of the lead Navigator (either existing staff or new hire)
 - b. Kick-off meeting with Trust and France-Merrick staff for program overview and project goal setting
 - c. Meeting with up to 10 entities/individuals identified by FMF and the Trust as important to developing Navigator capacity. Examples include Green Buildings

United (who has a similar program in Pennsylvania); Maryland Energy Administration (for information about electrification, renewable energy, and rebate/funding opportunities); and nonprofits active in these realms.

- 2) “Navigator” support that solves discrete, defined green capital project issues (of a scale that <40 hours of navigator time can solve) for 10 grantees and/or prospective grantees identified and assigned at the start of the project term by FMF and the Trust.
- 3) “Navigator” support that solves discrete, defined green capital project issues (of a scale that <40 hours of navigator time can solve) for at least 20 additional grantees and/or prospective grantees on an on-call basis.
- 4) Development of the outside expert “Auxiliary Navigator” component of the program including:
 - a. Developing/expanding a list of outside experts by topic area (renewable energy, green building envelope, various stormwater fields) who are willing and appropriate to serve in an external support role to the navigator at a) \$150/hour or less and b) a pro bono capacity
 - b. Developing any waiver or other documents needed to engage outside paid or pro bono consultants as navigator support entities.
- 5) A list of vendors that can be shared with grantees who need to bid work in a variety of areas (Engineering (Stormwater/HVAC), Architecture, Solar/geothermal).
- 6) Navigation products or more navigation: In the second half of the year-long project, with FMF and the Trust, decide whether there are consistent themes among grantee issues that warrant creating products that will help future grantees with similar issues work through those issues independently. Example products could be:
 - a. Up to three case studies or a list of FAQs that others can use to work through similar issues independently
 - b. Template language for procurement/bid and/or contract documents that properly and thoroughly lay out climate/environment-related goals for the projects and solicit enough information from bidders to allow proper assessment of qualifications and experience to accomplish the climate/environment goals and to allow consistent comparisons of bidders.
 - c. Other products as determined with FMF and the Trust.
 - d. (If no products of this nature are deemed to be of value, the hours will be converted into additional Navigator time.)
 - e. Quarterly meetings with the Trust and FMF to check in and make adjustments as deemed necessary.
- 7) Final report indicating outcomes, successes and challenges experienced and a description of how the funds were used. This report should indicate whether the pilot is deemed to have continuing value.

2.3 **Timeline:** Work will start by January 15, 2026, and will be completed by January 14, 2027.

Section III. OFFEROR'S MINIMUM QUALIFICATIONS

- 3.1 **Qualifications and Expertise:** Offeror or Offer's personnel assigned to the contract should have at least five years experience working with property owners or agents to plan or implement aspects of green building projects (renewable energy, green building envelope, and/or stormwater).

SECTION IV – ADDITIONAL SERVICES

- 4.1 **Additional Services:** The Trust 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. Each successful bidder may be engaged in additional phase(s) of work beyond the pilot year through this procurement action.
- 4.2 **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 V – PROPOSAL FORMAT AND SUBMISSION INFORMATION

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

Contract Officer: Sadie Drescher
 Telephone Number: 410-974-2941 x105
 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 he/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=35930> no later than **4:00 p.m. on December 1, 2025**, 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** 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**: The Offeror must submit a proposal narrative that includes:

- a) Name of an individual who will serve as the “lead Navigator” (or indicate if it will be a new hire), and names of individual(s) or proposed additional human and technical resources needed to provide the services and description of the individual(s)’ experience (minimum five years required) working with property owners or agents to plan or implement aspects of green building projects (renewable energy, green building envelope, and/or stormwater). Provide three examples of past work.
- b) The proposal for how to address the elements of the scope of work and required outcomes described in the services and deliverables section above. Indicate which areas of work (e.g., renewable energy, green building envelope, stormwater) will be handled internally and which areas of work will be augmented with outside paid or pro bono experts. Include a rough budget sketch indicating how much of the funding will be allocated to categories of internal personnel, outside experts (“Auxiliary Navigator element of the program in 2.2 #4 above), travel, indirect, and any other costs. Funders anticipate that at least \$20,000 of the \$120,000 available will be used for outside experts via the “Auxiliary Navigator” component of the program.
- c) Names, phone numbers, and email addresses of three references.
- d) Any proposed changes to the deliverables and payment schedule below, which will be incorporated into the fixed-price, deliverables-based contract/grant awarded to the Navigator chosen via this RFP. FMF and the Trust propose to allocate the first phase of funds upon identification of the lead Navigator for the project, enough to accomplish the second deliverable. Each payment is to be used to accomplish the subsequent deliverable, with 10% held until the completion of all deliverables. Offerors may suggest changes to the deliverables and payment schedule in their proposals or indicate acceptance as is.

Table X. Project deliverables and payment schedule

Deliverable(s)	Anticipated Date of Deliverable(s) completion	Amount Allocated Upon Delivery of Deliverable
1a Naming the lead Navigator and submitting a W-9	By 12/15/25	\$25,000
1b Kickoff meeting	By 2/15/26	\$25,000
1c 10 context conversations		
2 Full resolution of 10 grantee issues		
3a Full resolution of the second set of 10 additional grantee issues	By 6/15/26	\$20,000
4 Outside expert component of the program as defined above		
5 Vendor list		
3b Full resolution of the third set of 10 additional grantee issues	By 9/15/26	\$20,000
6 Navigator products or full resolution of a fourth set of 10 grantee issues	11/15/26	\$10,000
7 Final report and description of how the funding was used.		

5.6 **Eligible Organizations:** All entity types are eligible to apply.

5.7 **Subcontracting Opportunities and Procurement:** If an Offeror considers subcontracting of services to be available, they should so specify, and in that case demonstrate efforts to engage Disadvantaged, Minority, and/or Small Business Enterprises. The following website may be helpful in identifying such firms: <https://mbe.mdot.maryland.gov/>.

SECTION VI – EVALUATION PROCEDURE

6.1 **Qualifying Proposals:** The Contract Officer(s) will review each proposal for compliance with the qualifications set forth in Section III "Offeror's Qualifications and Expertise."

6.2 **Deviations and Negotiation:** The Contract Officer, along with any funding partner(s), 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 facilitated by the Contract Officer. This evaluation will be made on the basis of the evaluation criteria discussed below. The Contract Officer reserves the right to recommend an Offeror for contract award based upon the Offeror's proposal without further discussion. However, the Contract Officer may engage in further discussion if they determine that it might be beneficial. In such case, the Contract Officer will notify those 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 by Offerors who meet the qualifications set forth in Section III will be evaluated 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 Introduction and Scope of Work (in Sections I and 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.

SECTION VII – OTHER INFORMATION

7.1 **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.

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; and (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.

7.4 **Disadvantaged Business Enterprise, Minority Business Enterprise, and Small Business Enterprise (DBE/MBE/SBE) Participation:** This RFP encourages the participation of DBE/MBE/SBE 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/SBE 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.

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:** The Contractor(s) must comply with billing procedures as may be required by the Contract Officer. These may entail quarterly reporting of time and eligible expenses or may be based upon satisfactory completion of outcomes as described in Section II.

7.9 **Certification.** The Offeror shall certify that, to the best of its knowledge, the 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."

7.10 **Branding.** All products (outreach materials, events) will be branded with the France Merrick Foundation and the Chesapeake Bay Trust logos. Logos can be found online at <https://www.france-merrickfdn.org/apply-for-a-grant/our-process/> and <https://cbtrust.org/additional-resources/>.