



## Chesapeake Bay Trust

### **REQUEST FOR PROPOSALS (RFP)**

#### CONTRACTUAL SERVICES

#### ASSISTANCE TO PROVIDE OUTREACH SERVICES FOR THE CHESAPEAKE BAY TRUST'S DIVERSITY AND INCLUSION INITIATIVE

**Proposal Deadline: October 2, 2020**

### SECTION I – INTRODUCTION

1.1 **Purpose:** Diversity and Inclusion are among the Chesapeake Bay Trust's (Trust's) six core values and have been prominent in the organization's previous strategic plans over the past two decades. The Trust feels that the Chesapeake and similar systems will not be restored without a wide range of communities investing in and reaping the benefits of healthy natural resources. The success of these efforts will require increased outreach, capacity building, and a willingness to listen to and understand the values and specific concerns of diverse communities.

**The Trust seeks qualified contractors to increase awareness of and engagement in two of the Trust's programs, the [Community Engagement Mini Grant Program](https://cbtrust.org/grants/community-engagement/) and the [Chesapeake Conservation Corps](https://cbtrust.org/chesapeake-conservation-corps/), within under-engaged audiences and organizations.** The Trust, with the assistance of its Diversity and Inclusion Advisory Committee, has chosen to focus on two key Maryland audience types: communities of color and/or those involved in the human health sector. Additionally, the Trust is open to proposals that seek to engage other under-engaged audiences with sufficient justification. Learn more about the two Trust programs targeted for this RFP at: <https://cbtrust.org/grants/community-engagement/> and <https://cbtrust.org/chesapeake-conservation-corps/>.

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

2.1 **Timeline and Amount Available:**

Amount Available: \$10,000

Timeline: Work must be completed between November 2, 2020 and June 1, 2021

2.2 **Scope of Work:** The contractor(s) will provide advertisement to one or more of the two key Maryland audience types about the Trust opportunities, translate our goals into language best received by these audiences, and provide technical assistance for new applicants to navigate the online application process and submit at least five (5) applications to the contractor's target program (i.e., the target programs are the Trust's Community Engagement Mini Grant Program or the Chesapeake Conservation Corps Program).

### **2.2.1 Deliverables for Scope of Work**

- a) Submission to either the Trust's Community Engagement Mini Grant Program (<https://cbtrust.org/grants/community-engagement/>) or the Outreach and Restoration Grant Program (<https://cbtrust.org/grants/outreach-and-restoration/>) of one complete grant application\* from at least five (5) separate organizations whose membership is predominantly **people of color** (such as civic associations, nonprofit organizations devoted to issues of communities of color, neighborhood associations, faith-based groups); OR predominantly in the **human health sector** (such as hospitals, senior care centers, hospice organizations, and nonprofits focusing on rehabilitation); AND/OR from **another under-engaged audience** proposed in response to this RFP. The following criteria will be used to prioritize and select a proposed under-engaged audience. Proposed audiences will be scored on the following criteria that combine to create maximum impact:
  - i. an audience that is traditionally under-engaged in natural resource projects;
  - ii. the likelihood of an audience becoming more engaged in natural resource topics;
  - iii. an audience that has been disproportionately burdened by environmental harm and risk;
  - iv. the value/positive impact on natural resources, should the audience be more engaged; and
  - v. audience size - number of people in the population in Maryland.
- b) Submission in spring 2021 to the Trust's Chesapeake Conservation Corps Program (<https://cbtrust.org/chesapeake-conservation-corps/>) of applications by at least five (5) young (ages 18 to 25) people of color.
- c) A status report (separate of those submitted with invoicing) including a summary of progress on deliverables, written evaluation of the project and the method(s) used to date, and a description of lessons learned including challenges and roadblocks and how they are being addressed.
- d) A final report with the final invoice including a summary of deliverables, written evaluation of the project and the method(s) used, and a description of lessons learned including challenges and roadblocks and how they were addressed to ensure success.

\* A complete grant application is defined as an application that meets the criteria of the Community Engagement Mini Grant Program (<https://cbtrust.org/grants/community-engagement/>) or if applicable the Outreach and Restoration Grant Program (<https://cbtrust.org/grants/outreach-and-restoration/>).

**Payment:** Awards will be managed as firm-fixed-price contracts. Payment will be made as follows:

- a) \$1,400 per successful application submitted to the Community Engagement Mini Grant Program, not to exceed \$7,000, as described above in section 2.2.1 (a) AND/OR
- b) \$600 due upon successful submission of each eligible Chesapeake Conservation Corps applicant, not to exceed \$3,000, as described in 2.2.1 (b).

2.4 **Qualifications and Expertise:** Offeror's personnel assigned to the contract should have the following experience:

- a) Knowledge and cultural competency related to the target audience (communities of color, human health sector, and/or the justified audience as identified by the Offeror);
- b) A history of working with the target audience(s); and
- c) Experience with advertisement methods chosen.

Offeror's organization should have the following qualifications:

- a) Demonstrated established relationships with members of the priority audience (a minimum of three established relationships with priority audience members) and
- b) An organization mission that focuses either on the priority audience or that crosscuts that of the priority audience and natural resources.

The methods to be used by successful Offerors can include a variety of practices, and the methodologies chosen should be matched to the audience and justified in the proposal. Example methods may include, but are not limited to:

- a) Virtual convening/meeting platforms (e.g., Zoom, webex, go to meetings, etc.) especially now during COVID-19 or, if justified, in-person workshops (socially distancing and current best practices for COVID-19) to advertise the program and provide outreach for the target audience
- b) Training(s) on the application process.
- c) Individual contacts made through "Connectors," (the kinds of people who "know everyone")
- d) Email communications or listservs
- e) Phone calls
- f) Social media
- g) Traditional media such as radio or television

The Offeror should be as specific as possible when describing methods to be used. Generally, a scope of work that involves a combination of strategies above will be more effective than using one strategy. Contractor(s) will have access to resources for the Community Engagement Mini Grant Program and the Chesapeake Conservation Corps program (if needed) to aid in the creation of advertisement materials.

### SECTION III – ADDITIONAL SERVICES

3.1 **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 one additional phase of work through this procurement action.

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: Kathy Somoza  
Telephone Number: 410-974-2941 x120  
E-Mail: [ksomoza@cbtrust.org](mailto:ksomoza@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 he/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://www.GrantRequest.com/SID\\_1520?SA=SNA&FID=35173](https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35173) no later than **4:00 p.m. on October 2, 2020** 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**: The Offeror must submit a proposal that includes responses to a) through f) in a concise ( $\leq 5$  pages) description. Item g) must be submitted as a separate excel file. Items h) through j) may be addressed outside of the five (5)-page limit and may be attached as additional pages. All narrative material must be submitted in one electronic file.

- a) Names of individuals providing the services and number of years of experience in outreach and engagement as well as grant writing/application support for new applicants;
- 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) including how the project will safely conduct the proposed work considering the current COVID-19 pandemic;
- c) If proposing a new under-engaged audience (i.e., neither of the other two Trust target audience types that are communities of color and the human health sector), describe the following:
  - i. to what degree the proposed audience has been traditionally engaged in natural resource projects;
  - ii. the likelihood of the proposed audience becoming more engaged in natural resource topics;
  - iii. to what degree the proposed audience has been disproportionately burdened by environmental harm and risk;
  - iv. the value of and positive impact on natural resources, should the proposed audience be more engaged;
  - v. the proposed audience size; describe the size of people in the population living in Maryland; and
  - vi. the existing level of interest of the proposed audience in natural resource topics and/or demonstrated recreational use of local water ways.

- d) Response to the qualifications section: a description of the experience to provide services as described in Section II, including demonstration of existing relationships with key priority audience members;
- e) Examples of three (3) previously completed projects of similar type by either the Offeror's organization or the key personnel engaged in the project;
- f) Names, telephone numbers, and email addresses of three (3) references;
- g) The Offeror shall submit a budget by filling out the "Application Budget" worksheet of the Trust's Financial Management Spreadsheet. This form can be downloaded from [www.cbtrust.org/forms](http://www.cbtrust.org/forms), and the completed file will then be uploaded in the online application. The proposed budget will include the total number of hours and hourly rate of compensation and any additional costs required to complete the project using the budget form provided in the on-line application. If needed, provide additional justification or explanation as an attachment to the proposal;
- h) The resume(s) of the individual(s) providing the service;
- i) Signed and dated IRS form W-9; and
- j) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.

4.6 **Eligible Organizations:** Not-for-profit and for-profit entities are eligible organizations. No entity may enter into a Contract with the Trust under this funding opportunity if the entity is listed in [www.sam.gov](http://www.sam.gov) as debarred, suspended, or otherwise excluded.

4.7 **Subcontracting Opportunities and Procurement:** If 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 (DBE), Minority Business Enterprise (MBE), and Small Business Enterprise (SBE). The following website may be helpful in identifying DBE, MBE, and SBE firms: <https://mbe.mdot.maryland.gov/>.

## **SECTION V – EVALUATION PROCEDURE**

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

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 the Contract Officer and a review committee. 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 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 by Offerors who meet the qualifications set forth in Section II will be evaluated on the basis of the following factors:

- a) **Proposed Approach:** Evaluation of the work to be performed to accomplish the goals outlined in the Scope of Work in Section II (scale of 1 – 20)
- b) **Experience of Offeror:** Evaluation of the quality and quantity of the Offeror's experience and expertise in the areas proposed, supported by references (scale of 1 – 20)
- c) **Capacity:** Evaluation of the Offeror's ability and commitment to meet timeline for the Project (scale of 1 – 20)
- d) **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 (scale of 1 – 15)
- e) **Cost:** The total cost, including hourly rate and number of hours devoted to the project, proposed to accomplish deliverables (scale of 1 – 15)
- f) **Proposed priority audience:** Evaluation of the proposed priority audience(s) including justification for prioritizing the proposed audience given their current level of engagement in regional environmental initiatives. (scale of 1 – 10)

## **SECTION VI – OTHER INFORMATION**

6.1 **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.

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; 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.

6.4 **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.

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:** 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.

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 the Chesapeake Bay Trust logo found online at [www.cbtrust.org/logos](http://www.cbtrust.org/logos).