



Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONTRACTUAL SERVICES

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

Proposal Deadline: September 18, 2026

SECTION I – INTRODUCTION

1.1 **Purpose:** Diversity, Equity, 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. To this end, **the Trust seeks qualified contractors to increase awareness of and engagement in the Community Engagement and Restoration Mini Grant Program within under-engaged audiences and organizations.** The Trust, with the assistance of its Diversity, Equity, and Inclusion Advisory Committee, has chosen to focus on two key Maryland audiences: communities of color and/or the human health sector. The Trust seeks to support impactful projects throughout Maryland and expand engagement and applications from communities across the state, including Western Maryland and Southern Maryland, and Maryland's Eastern Shore. Proposals that demonstrate effective strategies for increasing stewardship, engagement, and restoration outcomes in these regions are encouraged. Additionally, the Trust aims to support projects that benefit veterans, and we are honored to play a role in administering funds contributing to the [Healing, Hunting, and Fishing fund](https://cbtrust.org/veterans/) (<https://cbtrust.org/veterans/>). Finally, the Trust is open to proposals that seek to engage other under-engaged audiences with sufficient justification. Learn more about the Trust program targeted for this Request for Proposals (RFP) at: <https://cbtrust.org/grants/community-engagement/>.

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

2.1 Timeline and Amount Available:

Amount Available: \$15,000

Timeline: Work must be completed between October 15, 2026 and May 1, 2027.

2.2 Scope of Work: The contractor(s) will:

- a) Provide advertisement to one or more of the key Maryland audience types about the Community Engagement and Restoration Mini Grant Program. Other Chesapeake Bay Trust grant programs, such as the Outreach and Restoration Grant Program, may be applicable, contingent upon discussion and approval by the Trust.

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, Teams, Google, WebEx, Go to Meetings, etc.) and/or in-person workshops to advertise the program and provide outreach for the target audience.
- b) Individual contacts made through “Connectors,” (the kinds of people who “know everyone”)
- c) General advertisement to the target audience through one or more of the following methods:
 - i. Email communications or listservs
 - ii. Phone calls
 - iii. Social media
 - iv. Traditional media such as radio or television

The Offeror should be as specific as possible when describing methods to be used, translating methods from theory into specific strategies. Generally, a scope of work that involves a combination of strategies above will be more effective than using one strategy. The contractor(s) will have access to resources for the Community Engagement and Restoration Mini Grant Program to aid in the creation of advertisement materials.

- b) Provide technical assistance for at least eight (8) new applicants to submit applications. Technical assistance will include training on developing robust project ideas that meet the goals of the applicable grant program, and successful navigation of and application through the online application system.

2.2.1 Deliverables for Scope of Work

- a) Submission by May 1, 2027, to the Trust's Community Engagement and Restoration Mini Grant Program (<https://cbtrust.org/grants/community-engagement/>) of one complete grant application* from at least eight (8) 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. A copy of the completed Community Engagement and Restoration Mini Grant Program application package should be submitted as the deliverable per applicant.

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 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) A status report 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.
- c) 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 and Restoration Mini Grant Program (<https://cbtrust.org/grants/community-engagement/>).

2.3 **Payment:** Awards will be managed as firm-fixed-price contracts. A maximum of two awards and minimum of one award will be made. Payment will be made as follows: \$1,875 per successful application submitted to the Community Engagement and Restoration Mini Grant Program.

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). Cultural competence involves understanding and appropriately responding to the unique combination of cultural variables which entail the patterns of human behavior that the community or population bring to interactions;
- b) A demonstrated understanding of the best methods to reach the priority audience proposed;
- c) Experience with advertisement methods chosen; and
- d) A history of working with the target audience(s).

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);
- b) An organization mission that focuses either on the priority audience or that crosscuts that of the priority audience and natural resources;
- c) A minimum of three to five years of experience with assisting the priority audience (communities of color, human health sector, and/or the justified audience as identified by the Offeror); and
- d) An organization with a proven track record (minimum three years of experience) of successfully assisting applicants in applying for and receiving funding from a variety of grant-related sources.

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: Anabel Kadri
Telephone Number: 410-974-2941 x168
E-Mail: akadri@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 new online award management system, SmartSimple. You can access SmartSimple in two ways:

1. Through our website: <https://cbtrust.org/login> and clicking the link “Log In to the Bay Trust Awards Portal”, *or*
2. The Chesapeake Bay Trust’s SmartSimple page: https://chesapeakebaytrust.us-1.smartsimple.com/s_Login.jsp

If you have applied to the Trust in the past, your profile and award data have been migrated to our new system. You can access the new system by entering the same email you used in our former system (Blackbaud), click ‘forgot password’, and follow the prompts to create a new password. If you are a new applicant, click the blue “Register” button on the landing page and follow the instructions.

See <https://cbtrust.org/login> for help setting up your account and finding funding opportunities.

Proposals must be submitted no later than **4:00 p.m. on September 18, 2026** (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 (≤ 5 pages) description. Items g) through i) may be addressed outside of the five (5)-page limit and may be attached as additional pages. All narrative materials must be submitted in one electronic file and uploaded to the “**Narrative & Supporting Documents**” tab of the online application.

- 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 2 above)
 - i. Consider how to leverage existing relationships and networks within the priority audience
 - ii. Include approximate timelines wherever possible, considering relevant program deadlines as described in Section 2.2.1, and address your ability and commitment to meet the timeline for the Project
- c) If proposing a new under-engaged audience (i.e., neither of the other two Trust target audience types identified by the Diversity Equity and Inclusion Advisory Committee 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 2, including demonstration of existing relationships and cultural competency 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 resume(s) of the individual(s) providing the service;
- h) Signed and dated IRS form W-9; and
- i) Any other information which the Offeror considers relevant to a fair evaluation of its experience and capabilities.
- j) The Offeror shall submit a budget by filling out the “**Budget**” tab of the online application. Additional guidance on the budget can be found at <https://cbtrust.org/login>. 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

*Example projects can include a mix of successful outreach and engagement projects, on-the-ground projects where there was significant community engagement, and technical assistance projects related to proposal writing and project development.

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:** Not-for-profit and for-profit entities are eligible organizations.

4.8 **Subcontracting Opportunities and Procurement:** 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. Offerors are strongly encouraged to engage Disadvantaged/Minority Business Enterprises (D/MBE). The following website may be helpful in identifying DBE and MBE 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 Section 2.4 "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) **Price and Hours:** 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(s) given their current level of engagement in regional environmental initiatives. (scale of 1 – 10)
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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, 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 and Compensation:**

A. **Method.** 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."

6.10 **Branding:** All products (outreach materials, events) will be branded with the Chesapeake Bay Trust logo found online at <https://cbtrust.org/grants/awardeeresourcesformsandpolicies/>.