

Chesapeake Bay Trust

REQUEST FOR PROPOSALS

FACILITATOR SERVICES ENVIRONMENTAL LEADERSHIP TRAINING TO SUPPORT THE CHESAPEAKE CONSERVATION AND CLIMATE CORPS PROGRAM

Proposal Deadline: July 27th, 2023 at 4:00pm EST

SECTION I - INTRODUCTION

1.1 **Purpose:** The purpose of this Request for Proposals ("RFP") is to develop and implement an environmental leadership training for Chesapeake Conservation and Climate Corps (Corps) members.

SECTION II – SCOPE OF WORK and OFFEROR'S MINIMUM QUALIFICATIONS

2.1 **Scope of Work – Introduction:** The Chesapeake Bay Trust (Trust) is an independent, 501(c)(3) nonprofit grant-making organization dedicated to improving the watersheds of the Chesapeake Bay, Maryland Coastal Bays, and Youghiogheny River. Created in 1985 by the Maryland General Assembly, the organization's goal is to engage and empower diverse groups to take actions that enrich the natural resources and local communities of the Chesapeake Bay region. The Trust is primarily funded through federal, state, and local contracts and grants, the purchase and renewal of "Treasure the Chesapeake" license plates and Maryland State income tax checkoff contributions.

The Chesapeake Conservation and Climate Corps Program (<https://cbtrust.org/chesapeake-climate-corps/>) is one of the Trust's flagship programs which promotes and protects the environment by providing young adults with opportunities to gain career skills and become more engaged through meaningful community service. The Corps is a one-year term of paid service that places young adults (ages 18-25) with nonprofits or government agencies to work full-time in the environmental field. Throughout the year this program provides young professionals with experience, leadership and professional development training, mentorship, and a support network of young professionals. Positions offered by host organizations are in the fields of environmental restoration, community engagement, climate change, environmental education, sustainable agriculture, energy conservation, and forestry. The initiative is supported by the Trust; BGE, an Exelon Company; the National Park Service; and the state of Maryland.

The Trust anticipates placing approximately 55 Corps Members beginning on August 15, 2023 and ending on August 14, 2024. The subsequent cohorts in 2024-25 and 2025-26 will likely have similar participant numbers.

2.2 Scope of Work – Maximum Bid and Timeline:

- Maximum Bid: Bids not to exceed \$17,500
- Timeline: The environmental leadership training will occur in-person, overnight (3-days, 2-nights) from December 18th-20th, 2023 at the National Conservation Training Center in Shepherdstown, West Virginia. Contingent upon funding availability, the timeline may be extended to support an additional two years of training work. The Trust will notify the contractor

by the end of the period of performance if additional training services in subsequent years will be requested as part of this contract.

2.3 Scope of Work – Deliverables: Offerors must outline in detail their ability to perform in a timely fashion the following services:

- Deliverable A – The contractor will design a draft agenda and curriculum for the overnight (3-days, 2-nights; with an anticipated late morning arrival on December 18th, 2023 and departure late afternoon of December 20th, 2023) intensive environmental leadership training for Corps Members.

The curriculum should include:

- a. A tiered format that uses multiple approaches to build knowledge, skills, communication, and comfort (e.g. facilitator-led, small group, peer-to-peer, and/or individual work and reflection);
- b. exploration and discussion of various methods of addressing past and present environmental and social issues in an effort to broaden the knowledge and perspectives of the policy, management, and leadership of the environmental movement;
- c. the development of tools and skills to support Corps Members identifying and accomplishing professional and personal goals; and
- d. activities Corps Members can undertake to self-assess their own stages of leadership development.

The agenda should include the information about the logistics of the training, plan for delivery of lessons, and any proposed guest speakers. The identification of guest speakers will be done with guidance from the Trust.

- Deliverable B – A finalized agenda and curriculum for the overnight (3-days, 2-nights) intensive environmental leadership training for Corps Members incorporating feedback from the Trust.
- Deliverable C – Facilitation of the overnight (3-days, 2-nights) intensive environmental leadership training for Corps Members at the National Conservation Training Center, December 18th-20th, 2023.
- Deliverable D – A final report summarizing lessons learned from the training and recommendations for future Corps leadership trainings.

2.4 Qualifications and expertise: Offeror's assigned to perform under the Contract should have the following:

- Experience designing and delivering curriculum for leadership training courses for environmental professionals using multiple instructional methods – at least three trainings with demonstrated formal curriculum over the past five years;
- a background working with diverse populations preferred; and
- the capacity to provide a minimum of two (2) individuals with the above qualifications to attend the leadership training and support breakout activities as needed.

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: Hayley Rost
Telephone Number: 410-974-2941 x119
E-Mail: hrost@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://www.grantrequest.com/SID_1520?SA=SNA&FID=35735 no later than **4:00 p.m. on July 27th, 2023** (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 II.
- 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. Under this program, food and beverage costs will not be supported. Use the Application Budget worksheet in the Financial Management Spreadsheet accessible at 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. If your proposed indirect rate is higher than 10% of the direct costs and your proposal is selected for funding, you will be required to provide the Negotiated Indirect Cost Rate Agreement (NICRA) documentation.

4.6 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, 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.

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. 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 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 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.

6.7 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. 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.

6.8 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 the Trust logo.