



Chesapeake Bay Trust

REQUEST FOR PROPOSALS

CONTRACTUAL SERVICES FOR CONNECTOR GROUP(S) TO IDENTIFY AND PROVIDE TECHNICAL ASSISTANCE TO APPLICANTS TO THE CHESAPEAKE BAY TRUST URBAN TREES GRANT PROGRAM

Proposal Deadline: December 14, 2023 at 4:00pm EST

SECTION I – INTRODUCTION

The mission of the Chesapeake Bay Trust (the Trust) is to empower community-based groups with the resources to pursue and “own” projects that both improve their communities and natural resources at the same time. One of the ways we accomplish this empowerment goal is through grant-making. We make about 400 grants per year to civic organizations, neighborhood groups, faith-based organizations, schools, nonprofits, local governments, and more.

The Trust has used a “Connector Group” model in several of our programs for many years as a way to let people and organizations who might benefit from Trust grant resources know about those opportunities, then help them apply. The Trust recognizes that while we do have a large reach and that most organizations with predominantly environmental missions know about our grant resources, many other types of organizations whose interests could be supported by a Trust grant program do not know about our grant programs. We have a goal to reach a wider, more diverse audience.

The purpose of this Connector Group Request for Proposals is to identify qualified entities that can increase awareness about one of the Trust’s grant programs, the Urban Trees Grant Program, among new audiences we have not yet reached and provide technical assistance to new applicants who need help with proposal submission. The Urban Trees Grant Program supports tree planting projects in urban, underserved communities and is described further below.

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

Scope of Work – Introduction: The Tree Solutions Now Act (2021) of the State of Maryland established the goal of planting 5 million native trees by the end of calendar year 2031. The Trust administers the Urban Trees Grant Program <https://cbtrust.org/grants/urban-trees/> component of the Initiative, which calls for community-based organizations to plant 500,000 of these trees in urban, underserved communities. The goals of the program are to reduce urban heat island effects, improve air and water quality, benefit human health, reduce stormwater volume and flooding, increase property values, reduce cooling costs, provide wildlife habitat, and mitigate the impacts of climate change.

All tree planting accomplished with these grant funds must occur in urban, underserved areas, defined in statute as:

- Urban areas as delineated by the United States Census Bureau AND
- Areas that meet ONE or more of the following criteria:
 - o **Historic Disenfranchisement**: A neighborhood that was, at any point in time, redlined or graded as “hazardous” by the Home Owners’ Loan Corporation; OR
 - o **Unemployment**: A census tract with an average rate of unemployment for the most recent 24-month period for which data are available that exceeds the average rate of unemployment for the State; OR
 - o **Household Income**: A census tract with a median household income for the most recent 24-month period for which data are available that is equal to or less than 75% of the median household income for the state of Maryland during that period; OR
 - o **Housing Project**: A housing project as defined in Section 12-101 of the Housing and Community Development Article.

The following map can help identify urban underserved areas in the state of Maryland:

<https://cbforg.maps.arcgis.com/apps/webappviewer/index.html?id=3bce1e558f5a46cd86287ee5929cf079>

The Trust is committed to the advancement of diversity, equity, and inclusion in its award-making and environmental work. As a result, the Trust strongly encourages urban tree applications from a wide range of applicants that are based in and/or partner with communities that are traditionally under-engaged, such as communities of color, community organizations, businesses, neighborhood associations, and other nonprofits both with environment-related missions as well as those without (e.g., faith-based groups, housing groups, etc.)

Through this RFP, the Trust seeks qualified Offerors to a) identify new eligible applicants not yet known to the Trust, and b) help these new applicants submit proposals to the Urban Trees Grant Program.

Scope of Work – Description & Deliverables:

The work performed by the contractor(s) ultimately selected via this Request for Proposals will be offered firm, fixed-price deliverables-based contracts, with payment terms tied to the deliverables outlined below. There are two sub-scopes of work: Part A, identifying new applicants to the Urban Trees Program, and Part B, helping those applicants apply to the program by providing technical assistance on the application process itself (writing the narrative of the proposal, using the online grant system, preparing budgets, etc.) and/or the technical aspects of the project (where to plant trees, what species to plant, how to plant them, etc.) The same entity may apply for both Parts A and B, and can request more funds.

A. Outreach Provider for the Urban Trees Grant Program

The Trust anticipates selecting up to two entities to advertise the Urban Trees Grant Program to audiences new to the Trust who are eligible to receive funds from the Program. The methods to be used can include a variety of practices, and the methodologies chosen should be matched to the audience and described in the proposal. Example methods may include but are not limited to:

- Workshops to advertise the program (either virtual or in-person)
- Email communications or listservs;

- Phone calls;
- Social media; and/or
- Traditional media such as radio or television targeted to the key audience.

Offerors will have access to resources for the Urban Trees Grant Program (if needed) to aid in the creation of advertisement materials.

The selected Outreach Provider will translate the Trust's goals into context best received by the proposed audience(s) where appropriate.

Deliverable for Scope of Work A:

Ten (10) Introductory meeting(s) **prior** to starting the Urban Trees Grant Program application process between the Contractor (winning Offeror), a member of the Trust Urban Trees staff, and appropriate individuals (project leader, organization leadership) from each of ten (10) potential applicant organizations who a) are new to the Trust (i.e., who have never applied before) b) who meet the eligibility requirements for the Trust's Urban Trees Grant Program, and c) who indicate intent to apply to the Trust's Urban Trees Grant Program. . The meetings will be coordinated by the Contractor (winning Offeror) and may be virtual or in-person. Meeting this deliverable will result in payment for services of \$5,000 (\$500 per new potential applicant.)

Payment requests must be accompanied by written status reports to include:

- a. Written evaluation of the outreach method(s) used;
- b. Description of lessons learned including challenges and roadblocks and how they were addressed to ensure success; and
- c. A comprehensive list of all applicants identified through the outreach process that may be interested in technical assistance later but were not ready to apply at this time. This list shall include contact information for individuals identified.

B. Technical Assistance Provider for the Urban Trees Grant Program

The Trust anticipates selecting one Offerors to work with the ten (10) potential applicant organizations identified through Deliverable A to provide support throughout the application process including the submission of proposals to the Urban Trees Grant Program online application located at <https://cbtrust.org/grants/urban-trees/> (to be opened in December 2023). Examples of types of technical assistance provided to potential applicants includes: identification of planting locations within eligible communities, identification of species and size of trees to plant, identification of methods to plant them (volunteer or contractor), procurement of supplies or services, writing of proposal narrative text (though all responses must be the original thought of the applicant, not the Offerors), completion of other online application components, preparation of budgets, and other aspects of project development.)

Deliverable for Scope of Work B:

Five (5) successfully completed proposals to the Urban Trees Program from among the group of 10 potential applicants identified in Part A above. A complete Urban Trees application is defined

as an one that meets the criteria and requirements as outlined in the Urban Trees Grant Program Application Package. Meeting this deliverable will result in payment for services of \$10,000 (\$2,000 per new potential applicant.)

Payment requests must be accompanied by written status reports to include a description of lessons learned including challenges and roadblocks and how they were addressed.

Scope of Work – Maximum Bid and Timeline:

- Maximum Bid: Bids not to exceed \$5,000 for Part A and \$10,000 for Part B
- Timeline:
 - Scope of Work A (Outreach) must be completed by February 2, 2024
 - Scope of Work B (Technical Assistance) must be completed by the Urban Trees Grant Program application deadline of March 7, 2024

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

Offerors submitting to Part A (Outreach)

- A minimum of three to five years of experience working with or engaging underserved communities as demonstrated
- Experience with the advertisement methods chosen;
- Demonstrated established relationships with members of the priority audiences;
- An organizational mission that focuses either on the priority audiences or that crosscuts that of the priority audiences and natural resources;
- A minimum of three to five years of experience with application writing; and
- A minimum of three to five years of experience with, and a proven track record of, successfully assisting lower-capacity entities with urban greening proposals in addition to providing streamlined support in a number of areas as related to tree planting efforts.

Offerors submitting to Part B (Technical Assistance)

- A minimum of three to five years of experience of supporting various technical aspects of a tree planting project, including outreach, site identification, tree species selection, procurement of supplies or services, and managing contractors

SECTION III – ADDITIONAL SERVICES

Additional Services: The Contract Officer may request ancillary or additional services within the capacity of the Offerors as may be useful or necessary in the interests of the Trust and the Project for any of the above Scopes of Work. It is anticipated that successful completion of the work will lead to additional services in future years of the Urban Trees Grant Program.

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

Principal Solicitation Officer and Issuing Office.

Contract Officer: Bridget Robey
Telephone Number: 410-974-2941 x117
E-Mail: brobey@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.

Prospective Offerors. An "Offeror" is a person or entity that submits a proposal in response to this RFP.

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.

Submission Instructions/Proposal Closing Date. Offerors must submit proposals using our Online Application System, located at: https://www.GrantRequest.com/SID_1520 no later than **4:00 p.m. on December 14, 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.

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). The Offeror should be as specific as possible when describing outreach, technical assistance, and/or support methods to be used.
- 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.

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. The following website may be helpful in identifying DBE, MBE, and SBE firms: <https://mbe.md.gov/>.

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.

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

Qualifying Proposals. The Contract Officer will review each proposal for compliance with the minimum qualifications set forth in "Offeror's Minimum Qualifications."

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.

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.

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.

SECTION VI: OTHER INFORMATION

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.

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).

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.

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.

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.

Billing Procedures and Compensation.

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.

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."

Branding. All products (outreach materials, press releases, print publications, signage, online messaging, event etc.) must:

- a. Include the Trust's logo (available at www.cbtrust.org/logo).
- b. Include the 5 million trees logo available here (https://cbtrust.org/wp-content/uploads/MFF_5mil-trees-logo.png).