



## Request for Proposals: NFWF Data Taxonomy and Ontology

### OVERVIEW

The National Fish and Wildlife Foundation (NFWF) seeks a qualified contractor to develop a written and visual data taxonomy and ontology for reporting on the effectiveness of our grantmaking investments. One award will be made for this contract. The period of performance is anticipated to be from date of the award through January 2024.

### BACKGROUND

NFWF's mission is to sustain, restore and enhance the nation's fish, wildlife, plants and habitats for current and future generations. Chartered by Congress in 1984, over the past 38 years NFWF has funded more than 6,000 organizations and 20,400 projects. In recent years, NFWF funds approximately 800 grants annually, via numerous competitive grant programs, and has approximately 2,500 grants under management at any given time. NFWF and NFWF-funded contractors collect a variety of spatial, biological, socioeconomic, and financial data from these grant projects and pair them with additional data from external sources to quantify the conservation impact of our investments. NFWF's current data collection and management approaches require updating to leverage recent advances in cloud-based data platforms that can handle the volume and variety of data we collect while also reducing the amount of staff time needed to aggregate, analyze, manage, and ensure quality control of these data.

### SCOPE OF WORK

NFWF seeks a qualified contractor who can lead NFWF through a discovery process to formalize our taxonomy and ontology for Key Performance Indicators (KPIs). The contractor will need a sufficient understanding of geographic information systems and spatial data to understand KPIs that are currently measured through spatial analyses and identify additional KPIs that could be collected more efficiently and objectively through spatial analyses. The goal of this project is to produce a detailed report for NFWF staff to use to procure and/or build out the best tool(s) for NFWF to efficiently compile, manage, analyze, and report on the outcomes of our grantmaking. Consequently, the structure of the taxonomy and ontology requires a detailed understanding of our reporting needs, which are complex due to the large number of partnerships we have with agencies, companies, and other foundations.

The following task constitutes the scope of work for this Request for Proposals. The contractor should anticipate regular (*e.g.*, weekly or bi-weekly) calls with NFWF throughout the project to discuss progress, obtain information from NFWF staff, overcome challenges, and develop a strategy for this effort. The contractor should anticipate at least two rounds of NFWF review of deliverables. Please provide time and cost quotes using the Contractor Budget Template provided.

**Task 1: In collaboration with NFWF staff, become familiar with our current KPI nomenclature, spatial data infrastructure, and various analytical and decision-support tools *via* interviews and joint review of reports and develop a data taxonomy and ontology for NFWF's KPIs.**

Description: Define a detailed data taxonomy and ontology for our KPIs that account for the various types of data collected, the relationships among them, and the various tools used to collect data or estimate the outcomes of our investments. To address the diverse reporting needs among our many partners, the



taxonomy and ontology must allow NFWF to reconcile similar, but not necessarily identical, definitions for many KPIs. The taxonomy and ontology must allow for KPIs to be accurately aggregated in multiple ways while also defining relationships between various data elements. The contractor will be expected to engage with NFWF staff to understand KPIs that are currently or potentially collected through spatial analyses.

Deliverables: Prepare and deliver written and visual (e.g., knowledge graph) documents detailing the ideal taxonomy and ontology for NFWF KPIs.

#### **REQUIRED EXPERTISE AND PROPOSED STAFF**

**A. Knowledge and track record:** Offerors must demonstrate expertise and documented experience creating complex data taxonomies and ontologies. At least some members of the team must have experience with: 1) ecological and socio-economic data and terminology, and 2) spatial data and geographic information systems.

**B. Capacity and flexibility to deliver services:** Providers must demonstrate that they have a degree of flexibility in how services are delivered, and that they have the ability to tailor content and delivery methods to meet NFWF's specific needs.

**C. Experience with public or philanthropic grantmaking:** Preference will be given to providers who have experience working with public (federal, state) agencies or philanthropic grantmakers.

#### **CRITERIA FOR COMPETITIVE APPLICATIONS**

Proposals will be evaluated and scored on the following criteria. Offerors should organize their Proposal Narrative based on these sections:

1. **Understanding of the Scope of Work.** The Scope of Work must demonstrate an understanding of the goals of the activities involved. This section should describe how you will communicate with NFWF and program stakeholders and include a timeline for reporting on progress and deliverables. Weight: 5%
2. **Technical Approach.** The proposed technical approach for conducting the tasks should clearly describe the proposed methods necessary to conduct the project. The section must demonstrate that those methods are appropriate for conducting the project and address any areas of complexity or uncertainty associated with conducting the project. Weight: 20%
3. **Qualifications of Proposed Personnel.** This section should clearly describe which tasks each member of the team will conduct and how their training and experience provide the requisite experience to do so successfully. Weight: 25%
4. **Contractor's Past Performance.** The proposal should include information on the project manager's past performance experience in the requested field. List recent (past 2-5 years) accomplishments and previous services related to the technical expertise offered. If subcontractors are to be used, information should be provided that demonstrates their past performance as well. Describe how that past performance is applicable to this effort. Weight: 25%



5. **Budget.** The proposed budget should itemize work in sufficient detail to enable reviewers to evaluate the appropriateness of the entire funding request. You must use attached [Contractor Budget Template](#). You may add columns to the template for additional tasks if needed, but should not make any other changes. If applicable, please include the proposed budget for equipment purchase in the proposal separate from the Contractor Budget Template. Weight: 25%

#### **ELIGIBLE OFFERORS & CONFLICT OF INTEREST STATEMENT**

Eligible applicants include institutions of higher education, other nonprofits, commercial organizations, international organizations, and local, state and Indian tribal governments.

By submitting a proposal in response to this solicitation, the offeror warrants and represents that it does not currently have any apparent or actual conflict of interest, as described herein. In the event an offeror currently has, will have during the life of the contemplated contract, or becomes aware of an apparent or actual conflict of interest, in the event an award is made, the offeror must notify NFWF in writing in the Statement of Proposals, or in subsequent correspondence (if the issue becomes known after the submission of the Statement of Proposals) of such apparent or actual conflicts of interest, including organizational conflicts of interest. Conflicts of interest include any relationship or matter which might place the contractor, the contractor's employees, or the contractor's subcontractors in a position of conflict, real or apparent, between their responsibilities under the award and any other outside interests, or otherwise. Conflicts of interest may also include, but are not limited to, direct or indirect financial interests, close personal relationships, positions of trust in outside organizations, consideration of future employment arrangements with a different organization, or decision-making affecting the award that would cause a reasonable person with knowledge of the relevant facts to question the impartiality of the offeror, the offeror's employees, or the offeror's future subcontractors in the matter. Upon receipt of such a notice, the NFWF Contracting Officer will determine if a conflict of interest exists and, if so, if there are any possible actions to be taken by the offeror to reduce or resolve the conflict. Failure to resolve conflicts of interest in a manner that satisfies NFWF may result in the proposal not being selected for award or the termination of the contract.

By submitting a proposal in response to this solicitation, the offeror warrants and represents that it is eligible for award of a contract resulting from this solicitation and that it is not subject to any of the below circumstances:

Has any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to a contract with the authority responsible for collecting the tax liability, where the awarding agency is aware of the unpaid tax liability, unless the agency has considered suspension or debarment of the corporation and made a determination that this further action is not necessary to protect the interests of the Government; or

Was convicted (or had an officer or agent of such corporation acting on behalf of the corporation convicted) of a felony criminal violation under any Federal or State law within the preceding 24 months, where the awarding agency is aware of the conviction, unless the agency has considered suspension or debarment of the corporation and made a determination that this further action is not necessary to protect the interests of the Government; or



Is listed on the General Services Administration's, government-wide System for Award Management Exclusions (SAM Exclusions), in accordance with the OMB guidelines at 2 C.F.R Part 180 that implement E.O.s 12549 (3 C.F.R., 1986 Comp., p. 189) and 12689 (3 C.F.R., 1989 Comp., p. 235), "Debarment and Suspension," or intends to enter into any subaward, contract or other contract using funds provided by NFWF with any party listed on the SAM Exclusions in accordance with Executive Orders 12549 and 12689. The SAM Exclusions instructions can be found [here](#).

### **SUBMISSION REQUIREMENTS**

Proposals must be submitted under the same cover at the same time, in three distinctly labeled and separate documents: 1) Technical Proposal, 2) Budget, and 3) Evidence of Financial Stability. Interested parties should submit proposals electronically to Ernest Newborn ([ernest.newborn@nfwf.org](mailto:ernest.newborn@nfwf.org)) using the requirements below:

#### **1. Technical Proposal**

- Format: Proposals must be provided in Word format or searchable PDF with a font size no smaller than 11 pt. (Embedded tables can use a different font size from 11pt; however, please ensure the size is sufficiently large for readability.) Note: The only section of the proposal that has a page limit is the work plan narrative (maximum of 5 pages).
- Contact information: Primary contact person, company name, address, phone, email, website, and EIN/Taxpayer ID#.
- Narrative: Concise (5-page limit) description of the work plan.
- Past experience: Summarize the Offeror's expertise and experience. List recent (past 2-5 years) accomplishments and previous services related to this proposed effort.
- Biographies: Resumes and/or Vitae of key staff and their role in the proposed work area.
- References: List two clients who have received services from the Offeror that is similar in nature to the proposed work, include: names, phone numbers, and email addresses.

2. **Budget:** The budget proposal must be submitted using the following [NFWF budget template](#).

3. **Evidence of Financial Stability:** The Offeror shall provide proof of financial stability in the form of financial statements, credit ratings, a line of credit, or other financial arrangements sufficient to demonstrate the offeror's capability to meet the requirements of this solicitation.



## **SELECTION PROCEDURE**

A panel of NFWF staff will review the proposals. Offerors may be asked to modify objectives, work plans, or budgets prior to final approval of the award. Only one award will be made for this project. If multiple institutions are involved, they should be handled through subcontracts.

## **SUBMISSION DEADLINES**

***July 11, 2023***

Deadline for questions about the solicitation to NFWF. Offerors should submit questions regarding this solicitation via email to **Ernest Newborn** ([ernest.newborn@nfwf.org](mailto:ernest.newborn@nfwf.org)). NFWF will post all the questions and responses to all questions so that all offerors have access to them at the same time. In order to provide equitable responses, all questions must be sent to NFWF **no later than 5:00 PM PST / 8:00 PM EST on July 11, 2023**.

***July 14, 2023***

NFWF will post the questions submitted regarding the solicitation and responses on the [NFWF website](#).

***July 26, 2023***

Deadline for receipt by NFWF of proposals. Proposals must be sent electronically as an email attachment to **Ernest Newborn** ([ernest.newborn@nfwf.org](mailto:ernest.newborn@nfwf.org)) by **5:00 PM PST / 8:00 PM EST July 26, 2023**. Proposals must be provided in Word format or searchable PDF.

***October 2023***

Contract start date.