



REQUEST FOR PROPOSALS

Independent Evaluation of the Chesapeake Bay Stewardship Fund's Innovative Nutrient and Sediment Reduction Program

OVERVIEW

The National Fish and Wildlife Foundation (NFWF) seeks a qualified Contractor for an independent evaluation of the Chesapeake Bay Stewardship Fund's Innovative Nutrient and Sediment Reduction (INSR) Program. The INSR Program aims to accelerate water quality improvements through the collaborative and coordinated efforts of sustainable, regional-scale partnerships and networks of practitioners with a shared focus on water quality restoration and protection. It contributes to NFWF's Chesapeake Bay Business Plan, which is available on NFWF's website:

<https://www.nfwf.org/sites/default/files/chesapeake/Documents/chesapeake-business-plan.pdf>.

BACKGROUND

NFWF's Chesapeake Bay Stewardship Fund is dedicated to protecting the bay by working to advance on-the-ground watershed restoration, helping local communities clean up and restore polluted rivers and streams, and restoring and protecting key Chesapeake Bay species. Working in partnership with EPA, other government agencies and private corporations, the Chesapeake Bay Stewardship Fund awards \$40 million to \$60 million per year through four competitive grant programs: the INSR Program, the Small Watershed Grants Program, and the Chesapeake Watershed Investments for Landscape Defense (WILD) Grants Program. The INSR Program is the focus of this independent evaluation.

EPA created the INSR Program in 2008 to support demonstration, technology transfer and effective dissemination, and institutionalization of innovative watershed restoration approaches in order to expand the collective knowledge of the most cost-effective and sustainable approaches to dramatically reducing or eliminating nutrient and sediment pollution to the Chesapeake Bay and its tributaries. The INSR program's primary objectives are:

- Accelerate sub-watershed and/or regional-scale implementation of nutrient and sediment reductions with demonstrated approaches that use priority practices that are in the state Watershed Implementation Plans;
- Actively transfer and disseminate the lessons learned from INSR projects to the wider Bay region stakeholder community; and
- Work to institutionalize the continued and expanded implementation of nutrient and sediment reduction practices and approaches.

The INSR program historically funded a wide range of potential innovations in Chesapeake Bay watershed restoration, including, but not limited to, development of new and emerging pollution reduction technologies and practices, creation of novel restoration financing vehicles, and geographic targeting of restoration efforts to accelerate progress. NFWF has administered the INSR program on behalf of EPA since its inception.

Beginning in 2018, and based on several key contemporaneous evaluations and analyses by NFWF, EPA, and others, including a [2017 independent evaluation](#) of the INSR program, NFWF and EPA significantly refined and narrowed the program's focus to more explicitly supporting growth, enhancement, and maturation of innovative, multi-stakeholder collaborative-, partnership-, and network-based models to



better affect the significant and transformative increases in on-the-ground implementation and water quality improvements required to meet clean water goals for the region.

This shift was further informed by a review NFWF commissioned from the University of Virginia's Institute for Engagement and Negotiation in 2018 to investigate model ecosystem restoration and conservation collaboratives across the U.S. in order to develop a more uniform understanding of the key characteristics of effective collaborative models and how they can be best established and supported. The resulting study identified key strategies for investing in collaborative and partnership-based conservation work that were adopted as priorities for the INSR program: 1) building and sustaining momentum, 2) establishing and improving effective collaborative processes, 3) enhancing core capacities, and 4) promoting continuous evaluation. A copy of the study can be found here: <https://www.nfwf.org/sites/default/files/2024-05/final-report-nfwf-ercc-2019.pdf>.

SCOPE OF WORK

The scope of this contract is for an independent evaluation of the INSR Program and the grants it awarded following the decision to prioritize collaboration and partnerships from 2018-2023. Approximately 70 grants and nearly \$64 million were awarded during this period to roughly 50 unique collaboratives. NFWF has drafted a set of questions for the evaluation. The Contractor will be responsible for finalizing the evaluation questions, with NFWF's input and approval. The Contractor should propose a technical approach for conducting the evaluation that clearly describes robust and appropriate methods for answering these questions.

Draft Evaluation Questions:

1. Has this narrower, more intentional focus on investing in collaborative and partnership-based models succeeded in achieving the program's three primary objectives of accelerated implementation, information-sharing and dissemination, and institutionalizing of successful approaches?
2. Have there been adverse consequences (e.g., individual organizational development, diversity of applicants and awardees, specific pollution sectors, achievement of INSR program objectives) from this shift in focus and resulting impacts to on-the-ground restoration efforts?
3. How do the outcomes, specifically the rate or scale of watershed restoration practices implementation and modeled or monitored water quality improvements, achieved through these collaborative and partnership-based models compare with historical INSR program approaches and awarded projects (i.e., pre-2018)?
4. What specific investments or activities in collaborative capacity have been most important and impactful in accelerating implementation outcomes from these collaboratives and what common outstanding needs for enhanced collaborative conservation capacity are not currently being met by the program?

NFWF will provide the Contractor with the following information:

- Records of grant awards – amounts awarded and project descriptions
- Grantee contact information and publicly available information on funded collaboratives
- Project reports for specific grants, as needed



- Map of business plan boundaries, focal areas and grant locations
- Metrics data from NFWF's EasyGrants database

Tasks:

- Finalize the evaluation questions and design, in consultation with NFWF
- Data collection and analysis
- Develop findings and recommendations
- Prepare contract deliverables

Deliverables:

- Monthly summaries of progress and key findings to NFWF (throughout contract term)
- Draft report for NFWF review and feedback (April 2025)
- Final presentation to NFWF and key Chesapeake Bay funding partners (June 2025)
- Final report for NFWF staff and Board of Directors (June 2025)
- 2-page summary of the evaluation results for NFWF's Board of Directors (June 2025)

The reports and presentations should include evaluation results, key findings and recommendations. The deliverables are intended for a general audience and should be tailored appropriately. The final report will be made publicly available on NFWF's website.

Schedule: Anticipated start date is September 1, 2024 and completion date is June 20, 2025. The Contractor should include a project schedule in the proposal for the tasks outlined above and major milestones.

REQUIRED EXPERTISE AND PROPOSED STAFF

The successful contractor must have significant expertise evaluating environmental or wildlife conservation programs, as outlined below. Joint proposals from a prime and sub-contractor are welcome but please note that only one contract will be awarded for this project.

- The Lead Evaluator should have 10 + years of experience in evaluation study design and implementation, including experience using the research methods proposed for this evaluation.
- The proposed team's prior work should include evaluations of grantmaking and environmental or wildlife conservation programs.
- Expertise in organizational development and collaborative, partnership, and network-based approaches to advancing public goods, specifically environmental and wildlife conservation.
- Experience working with federal, state, and local governmental agencies, conservation districts and nongovernmental organizations involved with conservation is required.
- Expertise in presenting complex information clearly and concisely to a non-technical audience in writing and verbally must be demonstrated.



- Ability to adhere to contract timeline and budgets must be demonstrated.
- Experience conducting and disseminating research involving humans as subjects is required.
- Education and training at the Masters or PhD level required for the Lead Evaluator and members of the team who are leading evaluation tasks.

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 include a description of how you will communicate with NFWF and program stakeholders and report on progress, results, and deliverables. Weight: 10%
2. **Technical Approach.** The proposed technical approach for conducting the evaluation should clearly describe the proposed methods necessary to conduct the project. The section must demonstrate that those methods are robust and appropriate for conducting the evaluation and address any areas of complexity or uncertainty associated with the evaluation questions. 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: 20%
4. **Contractor's Past Performance.** Include information on the primary investigator(s)'s past experience in environmental and/or conservation program evaluation. List recent (last 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 evaluation. Weight: 20%
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: 30%

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. Small and minority businesses, and women's business enterprises are strongly encouraged to apply.

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 proposal, or in subsequent correspondence (if the issue becomes known after the submission of the



proposal) 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.

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: <https://www.sam.gov/SAM/>

SUBMISSION REQUIREMENTS

Interested parties should submit proposals electronically to NFWF (Tori Sullens, Manager, Chesapeake Programs, Tori.Sullens@nfwf.org). 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 4) Example report. Proposals must follow the submission requirements below.

1. Technical Proposal



NFWF

- Format: Proposals must be provided in Word format or searchable PDF with a font size no smaller than 11 pt.
 - Contact information: Primary contact person, company name, address, phone, email, website, DUNS number, and EIN/Taxpayer ID#.
 - Narrative: Concise (10-page limit) description of the work plan and a summary of the applicant's expertise and experience, organized by the Criteria for Competitive Applications.
 - 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 applicant that is similar in nature to the proposed work; include names, phone numbers, and email address.
2. The **budget** proposal must be submitted using the following [NFWF budget template](#)
 3. **Evidence of Financial Stability:** The applicant 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 applicant's capability to meet the requirements of this solicitation. Examples of additional supplementary documents that may be submitted include but are not limited to, the most recent single audit report, GAAP audited statement, audited financial statements, and income sheets and balance statements.
 4. **Example Report:** Evaluation report on a similar topic prepared by the proposed team.

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

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| May 31, 2024 | Deadline for questions about the solicitation to NFWF. Contractor should submit questions regarding this solicitation via email to Tori Sullens, Manager, Chesapeake Programs, Tori.Sullens@NFWF.ORG . NFWF will post all the questions and responses to all questions so that all contractors 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 EDT May 31, 2024. |
| June 5, 2024 | NFWF will post the questions submitted regarding the solicitation and responses on the NFWF website . |
| June 21, 2024 | Deadline for receipt by NFWF of proposals. Proposals must be sent electronically as an email attachment to Tori Sullens, Manager, Chesapeake Programs, Tori.Sullens@nfwf.org by 5:00 PM EDT June 21, 2024. Proposals must be provided in Word format or searchable PDF. |



NFWF

September 1, 2024

Contract award to selected Offeror

June 30, 2025

Deliverables Due