# 2020 Goal Implementation Team Projects Process for Project Funding and Request for Ideas

## AT A GLANCE

This solicitation is geared toward projects that remove barriers limiting the accomplishment of management strategies/action plans. The funding is not intended to support long-term monitoring or restoration projects; rather, it is intended to support activities and analyses that will provide knowledge, help fill a specific gap and allow progress in Chesapeake Bay Program management strategies.

**Who is eligible to participate:** Members of GITs and workgroups responsible for management strategies, and other teams on a case-by-case basis.

**Deadline: June 15, 2020**

## I. Overview

The Environmental Protection Agency Chesapeake Bay Program Office (CBPO) has made funding available for key projects intended to accelerate accomplishment of the Management Strategies developed under the *2014 Chesapeake Bay Watershed Agreement*. The goal of these funds is to identify and remove key barriers that are hindering accomplishment of management strategies and workplans. Chesapeake Bay Program Goal Implementation Teams (GITs) and workgroups responsible for management strategies are eligible to participate. Project requests from other teams are evaluated on a case-by-case basis. In such instances, project requests should explicitly demonstrate how they support, directly or indirectly, the achievement of one or more related outcomes. For information on current and completed projects, please visit https://cbtrust.org/grants/git/.

## II. Project Selection Process

Any member of a GIT or workgroup may submit a project idea, using Table 1 in Section VII below, to GIT leadership. Each GIT leadership team is responsible for facilitating a process for prioritizing ideas generated within the GIT and reporting out the top three to four ideas, in ranked order, using the criteria outlined in Section III below. Any projects that don't make the top three to four priorities are candidates for alternative funding. These priority ideas will then undergo a review process coordinated by the Chesapeake Bay Trust (the Trust) using the CBPO review criteria. The intent of this review process is to provide scores and feedback that will support refining the scopes of work and help determine which projects will be included in the Request for Proposals (RFP) to seek bidders. The GIT Chairs will collaborate to form a consensus set of prioritized projects based on available funding levels and will submit that list to the CBPO Director for approval. For 2020, the total funding amount is $829,250. Selected projects will be assigned a GIT project lead, who will work with the Trust to ready the selected projects for the contracting phase and play a key role in seeing the project through to completion. This includes: serving as a reviewer for all proposals submitted in response to their specific scope of work; approving all status reports submitted by the selected contractor, provided no conflicts of interest exist; and aiding in succession planning in cases where a project lead relinquishes their position before closure of the project. GIT project leads can have no financial interest in the project, including reimbursement of any expenses incurred to participate in project. All projects will be openly competed by the Trust to satisfy federal procurement guidelines.

## III. Criteria

The following criteria will be used by GIT chairs and reviewers to rank project ideas. Projects:

- must address components of the workplan and/or management strategy (e.g. gaps, actions) or critical barrier(s) to achieving an outcome, particularly those identified through the Strategy Review System. In addition, must explicitly identify which component(s) will be addressed. (required);
- must include deliverables that can serve as a catalyst for expanded action (required);
- must be unique projects that have not been previously undertaken (required);
- should meet more than one Chesapeake Bay Program outcome, particularly outcomes that fall under more than one GIT (preferred);

- should aim to complete all the components of an outcome's decision framework (e.g., developing a monitoring plan, establishing criteria for measuring progress, addressing an identified science priority) (preferred).

## IV. Timeline

| Year | Month | Action/Event |
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| 2020 | Early to Mid-April | ****FUNDING LEVELS DETERMINED****<br><br>Coordinators and Staffers meet to discuss feedback received from GIT and Workgroup members on the prior years' GIT Funding process. GIT Project Officer (Greg Allen) informs the Trust of the funding level for the current year. |
| 2020 | Late April | Coordinators, and Staffers meet to discuss and finalize possible internal EPA modifications to the current years' GIT Funding process and to initiate new ideas for the year. GIT Project Officer (Greg Allen) informs the Trust of the proposed schedule for the current year. |
| 2020 | Early May | ****REQUEST FOR IDEAS SOLICITED****<br><br>GIT Workgroups, Coordinators, and Staffers start or continue soliciting project ideas from their team members for the Table 1 Ideas, released to the GITs as a Request for Ideas (RFI). The Trust reviews and provides edits to the RFI. The Trust coordinates with the GITs about the online process to submit the Table 1 Ideas through the Trust's Online Grants Management System Portal (online portal) https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35447. |
| 2020 | June 15 | ****TABLE 1 IDEAS ARE DUE****<br><br>The GIT leadership submits the top three to four project proposals from within each GIT. The Table 1 ideas are due and submitted through the Trust's online portal. The Trust pulls the submitted applications from the portal and reviews the Table 1 ideas. |
| 2020 | Mid to Late June | If more than one Table 1 idea is submitted per GIT, the Trust provides an internal technical peer review and sends scores/comments to EPA for review to determine which Table 1 ideas move forward for each GIT. Ultimately, a subset of the highest ranked project idea proposals is selected based on available funds for each year. The Lead Preparer listed on the form will receive an email notification from the Trust if their submission will (or will not) move forward. If the idea is accepted, the GIT lead preparer will be invited to complete Table 2 through the Trust's online portal. Peer review comments from reviewers and the Trust are provided to each GIT for the purpose of strengthening the project designs. |
| 2020 | Late July | GIT Chairs, Coordinators and Staffers present and rank proposals. GIT Chairs select the finalists from the full suite of projects based on criteria in Section III, comments from the Trust's review, and input from other Bay Program components. |
| 2020 | Early August | GIT Chairs present a proposed final list of projects for funding to the CBPO Director for final approval. GIT Project Officer (Greg Allen) informs the Trust of the finalized list of projects and maximum funding levels for the current year. |
| 2020 | Early August | The Trust provides a training session to the GIT Chairs, Coordinators and Staffers during regularly scheduled Coordinator-Staffer meeting to discuss scope of work development and to review the overall schedule. |
| 2020 | Early August to | ****DRAFT TABLE 2 SCOPES ARE DUE**** |

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| | **Early September** | GIT lead refines the scope of work and request for proposal (RFP) content. The Draft Table 2 ideas are due and submitted through the Trust's online portal. The Trust pulls the submitted applications from the portal and reviews the Table 2 ideas. https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35447. |
| **2020** | **Mid-September** | The Trust joins the GIT coordinator and staffer meeting to review and discuss the Draft Table 2 submittals (Table 2 review meeting). The goal of the meeting and review process is to ensure clear and biddable scopes of work. The Trust provides input and edits to the Table 2 submittals to translate the Table 2 information into robust RFP language that will result in strong project applications. |
| **2020** | **Mid to Late September** | The Trust is available to discuss further Draft Table 2 edits via conference call to refine scopes of work. GIT lead continues to refine the scope of work and RFP content. The Trust ensures that proposed scopes are fully defined, biddable, and determines any conflict of interest that may be perceived for bidding contractors. |
| **2020** | **Late September** | ****FINAL TABLE 2 SCOPES ARE DUE****<br><br>The Final Table 2 submittals are due and submitted through the Trust's online portal. The Trust pulls the submitted applications from the portal and drafts the RFP with the Final Table 2 Scopes. The Draft RFP sent to the GIT Project Officer (Greg Allen) for final approval and advertisement.<br>https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35447 |
| **2020** | **October** | **** RFP IS OPEN FOR AT LEAST 30 DAYS****<br><br>The Trust advertises one Final RFP for all scopes to seek bidders and formally opens the online application. The Trust advertises the RFP on the Trust Website, the Chesapeake Network, and via email to potential contractors and the full GIT team. The Trust completes a MBE/WBE/DBE search for potential contractors, creates a distribution list, a contact list, and keeps a record of the MBE/WBE/DBE outreach. |
| **2020** | **Late October** | During the open RFP period, the Trust responds to questions and provides answers (Q&A) through coordination with GIT Team. The Trust posts the Q&As online at regular intervals throughout the RFP advertisement period. The Trust sends reminders of the open RFP to the full distribution list during the RFP advertisement period. |
| **2020** | **Mid November** | ****BIDS DUE AND RFP IS CLOSED****<br><br>Bids from contractors are due and submitted through the Trust's online portal. The Trust formally closes the online application. |
| **2020** | **Early December** | The Trust pulls the submitted applications from the portal and reviews all submitted applications. The Trust sends a request for subject matter expert reviewers, including GIT Team reviewers for each scope. The Trust allows 4 to 6 weeks for online reviews of each scope. |
| **2020** | **Late November to December** | The Trust compiles scores, comments, and reviews for all applications and all scopes. |
| **2021** | **January** | The Trust schedules conference calls with GITs to determine winning applications and discuss rationale for choice; rationale to be used in feedback debriefs for declined applicants. |
| **2021** | **February** | The Trust drafts award contracts, contingencies, and deliverables-payments schedule and requests final approval from GIT Lead. |
| **2021** | **March** | Award letters are sent to winning applicants via email and GIT leads are cc'd as a record. |

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| **2021** | **Early April** | The Trust responds to requests for feedback from declined applicants and provides debriefs. |

## V. Role of a GIT Technical Project Lead

Each project selected for funding will have assigned a "GIT technical project lead" (GIT lead) by the GIT Chair. The GIT lead may be the individual who submitted a project idea in response to this solicitation or may be a different individual assigned by GIT leadership. The GIT lead will have several responsibilities over the course of the project:

- Providing a detailed scope of work for the project, with guidance from the Trust, to be used to procure a contractor;
- Helping to identify at least three potential bidders to accomplish the work outlined in the scope of work;
- Reviewing proposals as part of a review team; and
- Helping to monitor performance and progress and the acceptability of deliverables of the winning contractor. Coordinate with the Trust to resolve issues as needed.

An individual named as a GIT lead is not permitted to have a conflict of interest with any organizations that respond to the Trust Request for Proposals. Should a GIT lead be conflicted with any bidders, he or she will be replaced at least for the duration of the bid phase. In the event that a GIT lead is no long able to serve as a project lead until its closure, it is the responsibility of the GIT lead to work with their team leads in succession planning as it relates to the project.

## VI. Idea Development Assistance

Interested parties are strongly encouraged to work with their GIT leadership (chairs, coordinators, and staffers) as well as the Chesapeake Bay Program Office Web Team, IT team, GIS team, Communications Office and/or Workgroup, and the Science Prioritization Team prior to completing the form in Section VII. If you have questions or need assistance, please contact:

Chesapeake Bay Trust Staff:
Sarah Koser
Chesapeake Bay Trust
(410) 974-2941 ext. 106
skoser@cbtrust.org

GIT Funding Coordinator:
Greg Allen
Environmental Protection Agency
(410) 267-5746
allen.greg@epa.gov

GIT Funding Staffer:
Chantal Madray
Chesapeake Research Consortium
(410) 267-5721
madray.chantal@epa.gov

Web Team:
Guy Stephens
University of Maryland
(410) 295-1316
gstephens@chesapeakebay.net

IT Team:
Brian Burch
Environmental Protection Agency
(410) 267-5736
burch.brian@epa.gov

GIS Team:
John Wolf
U.S. Geological Survey
(410) 267-5739
jwolf@chesapeakebay.net

Communications:
Rachel Felver
Alliance for the Chesapeake Bay
(410) 267-5740
rfelver@chesapeakebay.net

Science Prioritization:
Emily Trentacoste
Environmental Protection Agency
(410) 267-5797
trentacoste.emily@epa.gov

## VII. Project Idea Submission Form

**Step 1 -** Please fill out the following form through the Chesapeake Bay Trust Online Grant System at: https://www.GrantRequest.com/SID_1520?SA=SNA&FID=35447.

**Table 1: Defining the Project and Outlining the Scope of Work**

*The purpose of this table is to articulate a project idea to evaluate project necessity/relevancy and to strengthen project outcomes, steps, and deliverables. As you are developing your ideas, consider describing in your project justification section if the following three initiatives were incorporated: 1) Science, 2) Diversity, Equity, Inclusion, and Justice, and/or 3) Local Engagement.

<table>
<tr><th>Item</th><th colspan="2">Guidance</th></tr>
<tr><td><u>Goal Implementation Team (GIT)</u></td><td colspan="2">As determined by the Chesapeake Bay Program.</td></tr>
<tr><td><u>Project Priority #</u></td><td colspan="2">List the rank of this project in relation to other projects being submitted by the same GIT. Teams may submit up to four project ideas, each with a rank of 1-4.</td></tr>
<tr><td><u>CBPO Creative Team Component(s)</u><br>(Yes or No)</td><td colspan="2">Does this project involve components that require input from the following functional areas: Web and Creative, GIS, Communications, and IT.</td></tr>
<tr><td><u>Proposed GIT Technical Project Lead</u></td><td colspan="2">If this project idea is selected to move forward for bid, the person identified as the GIT Technical Project Lead will be responsible for reviewing and recommending the selected contractor; this person will also review and approve the selected contractor's work for the duration of the project. GIT technical leads cannot be a part of the bidding team or financially be involved in the project. Provide the following for the GIT Lead: 1) First and Last Name, 2) Organization, and 3) email address.</td></tr>
<tr><td><u>Preparers</u></td><td colspan="2">List names of all parties beyond the GIT lead who were part of developing the content of this table; list first the lead preparer (the point of contact for questions/clarification). These entities will not be allowed to bid on the scope of work during the Request for Proposals (RFP) stage. Provide the following for each Preparer: 1) First and Last Name, 2) Organization, and 3) email address.</td></tr>
<tr><td><u>Project Title</u><br>(10 words or less)</td><td colspan="2">The title should be short and give a high-level view of what your project is trying to accomplish. Creative and catchy is fine only if it also captures the real purpose of your work. (Good Examples: "New Methods for Resilient Fish Ladder Design"; "Research and Database Creation for In-stream Litter Collection Devices"; "Development of Invasive Plant Management at Reforestation Sites").</td></tr>
<tr><td><u>Project Type (check all that apply)</u></td><td><u>Metric Development and Tracking Projects:</u><br>• Support for science needed to develop metrics<br>• Metric/indicator development<br>• Performance measure development<br>• Monitoring/tracking program development<br>• Data collection program development<br>• Assessments of data to evaluate progress on metrics<br>• Modeling support</td><td><u>Logic and Action Plan Implementation Projects:</u><br>• Economic modeling<br>• Database development<br>• Policy research and recommendations<br>• Training<br>• Mapping, lands assessment<br>• Baseline analyses<br>• Environmental monitoring<br>• Environmental demonstration projects<br>• Other (please describe)</td></tr>
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| | • Other (please describe) | |
| **Proposed Outcomes** | Outcomes are the changes you expect to see as a result of the work being completed. Examples of outcomes could be increased knowledge around how fish are changing habits/will change habits due to climate change; future fish ladders will be more successful due to readily available improved design standards; future fish passage policies will be reflective of resulting research. | |
| **Justification** (500 words or less) | This is your elevator speech - why is this work important to the over-arching goals? Why is it important to the other GITs? How does this work build on previous work? Be succinct in your answer. | |
| **Proposed Project Steps and Timeline (up to 8 maximum)** | List all of the major steps required to accomplish the project goals. Make sure to include any meetings with GIT teams and other relevant stakeholders (try to quantify meetings; a step to review draft deliverables by relevant stakeholders; and a step for the contractor to refine the deliverables after draft review. Indicate whether the methods by which a contractor will be expected to undertake the work are well known or whether you intend for the bidders to propose the methodology. Assume that work will start March 2021. | |
| **Estimated Costs** | Provide an estimate of the project cost (generally $25,000-$75,000). Estimating accurate budgets can be a challenge. Some tips to improve budget accuracy: to start, estimate number of the hours and other costs like supplies and travel that it would take *YOU* to accomplish each of the steps identified above. Keep in mind that contractors can range from $50-150 an hour (when indirect costs are factored in). Don't forget to include the time it would take for the contractor to attend any meetings. Finally, don't forget to account for contractor time to revise final products to incorporate stakeholder feedback. | |
| **Cross-Goal Benefits** | List any cross-goal benefits succinctly | |

**Step 2 –** Complete Step 2 ONLY if your project idea is selected for funding and will be included in the RFP; you or the assigned GIT lead will be required to provide the following information:

**Table 2: Defining Project Scope of Work**

*The purpose of this table is to define the project's scope of work in detail. This table will be used to solicit bids from qualified contractors through a Request for Proposals (RFP) process.

*Place yourself in the mindset of a consultant bidding on this work. In order to get the best possible responses, be cognizant of using technical jargon, define acronyms, and use succinct language. It is very important to distill scopes of work down to concise, clear language that makes bidder/contractor expectations very clear.

*This table should be a refinement to information found in Table 1 (Please take into account information garnered by project idea review and feedback).

| *Item* | *Guidance* |
|---|---|
| **Goal Implementation Team (GIT)** | As determined by the Chesapeake Bay Program. |
| **Project Priority #** | List the rank of this project in relation to other projects being submitted by the same GIT. Teams may submit up to four project ideas, each with a rank of 1-4. |
| **Proposed GIT Technical Project Lead** | This person will review and approve the selected contractor's work for the duration of the project. GIT technical leads cannot be a part of the bidding team or financially be involved in the project, including receipt of reimbursement for any expenses. Provide the following for the GIT Lead: 1) First and Last Name, 2) Organization, and 3) email address. |

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| **Preparers** | List names of all parties beyond the GIT lead who have been a part of developing the content of this table; list first the lead preparer (the point of contact for questions/clarification). Prepares of this scope of work will not be allowed to bid on the scope of work during the RFP stage. Provide the following for the Preparers: 1) First and Last Name, 2) Organization, and 3) email address. |
| **Project Title** (10 words or less) | The title should be short while also giving a high-level view of what your project is trying to accomplish. Creative and catchy is fine only if it also captures the real purpose of your work. (Good Examples: "New Methods for Resilient Fish Ladder Design"; "Research and Database Creation for In-stream Litter Collection Devices"; "Development of Invasive Plant Management at Reforestation Sites"). |
| **Outcomes** | Outcomes are the changes you expect to see as a result of the work being completed. Examples of outcomes could be increased knowledge around how fish are changing habits/will change habits due to climate change; future fish ladders will be more successful due to readily available improved design standards; future fish passage policies will be reflective of resulting research. |
| **Maximum Bid Amount** | As generated in Table 1 during the project idea selection process, modified by any provided feedback during review. |
| **Project Steps and Timeline (up to 8 maximum)** | List all of the steps required to accomplish the project goals. Make sure to include any meetings with GIT teams and other relevant stakeholders (try to quantify meetings; a step to review draft deliverables by relevant stakeholders; and a step for the contractor to refine the deliverables after draft review. Indicate whether the methods by which a contractor will be3 expected to undertake the work are well known or whether you intend for the bidders to propose the methodology. Assume that work will start March 2021. |
| **Stakeholders and/or Participants** | List all stakeholders that will be consulted during each phase of the project. Include names of working groups, steering committees, etc. Provide the following: 1) First and Last Name, 2) Organization, and 3) email address. |
| **Deliverables** | List all deliverables to be derived from the successful bidder’s work. Deliverables are the tools/information/workshops/tangible items/etc. that are created to achieve your outcomes. Examples of deliverables include fish ladder design standards, a workshop for a targeted audience to disseminate key findings; a white paper about fish ladder project case studies; analyzed results from a fish ladder public opinion survey; an educational curriculum; etc. Make sure to include a final report as a separate deliverable. |
| **Quality Assurance Project Plan (QAPP) Requirement (Yes or No)** | Will a QAPP be required? If your project will generate environmental data, or use secondary data, a QAPP may be required. Visit the Chesapeake Bay Quality Assurance Program website for more details at http://www.chesapeakebay.net/about/programs/qa. |
| **Qualifications of Bidder** | List skills and experience required of a qualified bidder. Be specific here - ask for expertise in applicable knowledge areas, familiarity with specific software, models, and experience with certain project types. Examples of qualifications include demonstrating experience of completing three fish ladder design projects in the past five years or demonstrating experience of creating two advanced educational curriculums in past five years. |
| **Bidders List** | Due to federal procurement guidelines, project ideas MUST be open to competitive bidding. These bidders must not have been involved in the development of the project idea or scope of work. The Trust will then provide the RFP to these groups as well as other bidders per the federal procurement guidelines. GIT leads should also send the RFP, when open for bids, to their networks and specific entities they think would be a good fit for their scope of work. Provide at least three entities for the bidders list and include: 1) |

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| | Organization Name, 2) Organization Contact Name and 2) Organization Contact email address. |
| **Reviewers List** | Provide contact information for potential reviewers beyond the GIT Technical Lead. These reviewers should be experts in the field. In addition, these reviewers should not have a conflict of interest with the potential bidders, such as a financial stake in the potential bidder company, be on the staff of a potential bidder, or assist the potential bidders with their proposal. The Trust will reach out to the reviewers to complete reviews in order to select the most qualified bidder and report the results to CBPO. Provide at least three reviewers and include: 1) First and Last Name, 2) Organization, and 3) email address. |