2019 Goal Implementation Team Projects Process for Project Funding and Request for Ideas

AT A GLANCE

This solicitation is focused on projects that remove barriers limiting accomplishment of management strategies/work plans. This funding is not intended to support implementation of restoration, protection, or stewardship projects; rather, it is intended to support tools or analyses that will make restoration, protection, and stewardship easier in the future.

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

Deadline:
June 14, 2019

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 work plans. 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 GIT 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 2019, the total funding amount is $860,000.[1] 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 work plan 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);

[1] This amount may vary slightly based on overhead costs determined by the Trust.

- 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 a identified science priority) (preferred).

IV. Timeline

Date	Action/Event
April 18, 2019	GIT Coordinators and Staffers meet to discuss feedback received from GIT and Workgroup members on the FY2018 GIT Funding process.
April 30, 2019	GIT Chairs, Coordinators, and Staffers meet to discuss and finalize possible modifications to the FY2019 GIT Funding process, including, 1.) increased connections to factors, gaps and actions identified through the SRS process as critical, and 2.) earlier/more frequent collaboration with CBPO Web Team, IT team, GIS team, Communications Office and/or Workgroup, and Science Prioritization Team (to determine internal capacity to assist in implementation of projects). ***Please note that, starting in FY2019, projects will not be considered for funding until they have been "checked off" as having coordinated with these teams.***
May 1, 2019	GITs (and their respective workgroups) should start or continue soliciting project ideas from team members. PLEASE BE REMINDED to include enough time to engage in an internal review by CBPO Web Team, IT team, GIS team, Communications Office and/or Workgroup, and Science Prioritization Team. ***Projects will not be considered for funding until they have been "checked off" as having coordinated with these teams.***
Determined by GIT	Deadline for project ideas submitted to GIT leadership.
June 14, 2019	**TABLE 1 IS DUE:** Deadline for GIT leadership to submit top three to four project proposals from within each GIT. In FY2019, proposals (Tables 1 and 2) will be submitted using the Trust's online portal.
June 17-28, 2019	Peer review comments are solicited on the top three to four proposals from each GIT for the purpose of strengthening the project designs.
July 30, 2019	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.
August 2, 2019	GIT Chairs present a proposed final list of projects for funding to the CBPO Director for final approval & CBPO Director will notify Management Board and GIT Chairs of final approved project list.
August 8, 2019	CBT-led training (project selection and scope of work development). Takes place during regularly scheduled Coordinator-Staffer meeting.
August 9, 2019 – September 6, 2019	**DRAFT TABLE 2**: GIT lead refines the scope of work and request for proposal (RFP) content (Table 2 in Section VII below).
September 12, 2019	**TABLE 2 REVIEW MEETING**: A Trust staff member will join the coordinator and staffer meeting to review and discuss Table 2's. The goal of the meeting and review process is to ensure clear and biddable scopes of work. Please bring a copy of your Table 2 draft to the meeting.
September 13-20, 2019	**CONFERENCE CALLS**: The Trust is available to discuss further Table 2 edits via conference call to refine scopes of work. GIT lead continues to refine the scope of work and RFP content (Table 2 in Section VII below).

September 24, 2019	**TABLE 2 IS DUE**: All Table 2's are submitted to the coordinator and staffer of Enhance Partnering, Leadership and Management GIT (then to be sent to the Trust by September 27 to create RFP).
October 2019	**RFP IS RELEASED**: The Trust issues an RFP to seek bidders.
November 15, 2019	Bids from contractors are due to the Trust.
November 2019 – December 2019	The Trust compiles reviews, works with the GIT technical project leads to identify winning bidders, initiates sub-award contracts.
January 2020	GIT technical leads meet with awardees to commence projects.

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 progress and the acceptability of deliverables of the winning contractor.

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:

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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.

Item	*Guidance*		*Text Box*
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.		
Preparer(s) (name(s) and email(s))	List names of all parties 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.		
Project Title (10 words or less)	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").		
Project Type	Metric Development and Tracking • Support for science needed to develop metrics • Metric/indicator development • Performance measure development • Monitoring/tracking program development • Data collection program development • Assessments of data to evaluate progress on metrics • Modeling support	Work Plan Implementation Projects • Economic modeling • Database development • Policy research and recommendations • Training • Mapping, lands assessment • Baseline analyses • Environmental monitoring • Environmental demonstration projects	
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.	
<u>CBPO Creative Team Component(s)</u> (Yes or No)	Does this project involve components that require input from the Web, GIS, Communications, IT, and/or Science Prioritization Teams?	
<u>Justification</u> (500 words or less)	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.	
<u>Proposed Project Steps and Timeline</u>	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 be~~3~~ 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 1, ~~2019~~2020.	
<u>Estimated Costs</u>	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.	
<u>Cross-Goal Benefits</u>	List any cross-goal benefits succinctly with bullet points.	
<u>Proposed GIT Technical Project Lead</u> (name and email)	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.	

Commented [SK1]: This box describes outcomes and not project justification. Perhaps use the following from last year:

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.

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*	*Text Box*
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 (name and email)	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.	
Preparer (name(s) and email(s))	List names of all parties 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.	
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	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 1, 2019.	
Stakeholders and/or Participants	List all stakeholders that will be consulted during each phase of the project.	
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.	
QAPP Requirement	What environmental data will be generated? Will a quality assurance plan be required? Visit the Chesapeake Bay Quality Assurance Program website for more QMP and QAPP 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, 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. List at least three entities (with contract information) to include in the RFPs. 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.	
Reviewers List	Provide contact information (at minimum the name, organization, and email address) for at least three (3) 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.	