



Request for Quotations

Contract to Conduct On-the-Ground Monitoring To Assess NFWF Impact on Migratory Shorebirds, Waterfowl and Marsh-Nesting Birds in Priority Wetlands of the Great Lakes

OVERVIEW

The National Fish and Wildlife Foundation (NFWF) seeks a qualified Contractor to assist in monitoring NFWF's impact on migratory shorebirds, waterfowl and marsh-nesting birds for the Great Lakes Program. The Great Lakes Program is designed to restore and enhance habitat and water quality to increase the distribution and abundance of fish, birds and other wildlife, and enhance the ecological, social and economic values of the region. In coastal wetlands and marshes, the Great Lakes Program will restore habitat quality and hydrology, with an emphasis on improving populations of high-priority species groups such as migratory shorebirds, waterfowl and marsh nesting bird, and representative indicator species including mallard (*Anas platyrhynchos*), lesser yellowlegs (*Tringa flavipes*) and sora or Virginia rails (*Porzana carolina*; *Rallus limicola*) respectively. You can obtain a copy of the [Great Lakes Business Plan](#) on NFWF's website.

BACKGROUND

While the program includes a variety of goals, the scope of work under this contract is for the development and implementation of a monitoring and evaluation approach building upon the framework laid out in the [Great Lakes Monitoring and Evaluation Plan](#) (M&E Plan) to assess shorebird, waterfowl and marsh-nesting bird response to NFWF's Great Lakes coastal wetland and marsh habitat restoration efforts. The purpose of the evaluation is twofold: 1) to understand whether migrating birds and marsh-nesting birds are responding favorably (increased abundance, occupancy) to the increased energy and improved habitat made available to them through wetland restoration (hydrology, habitat quality improvements, invasive species control); 2) to validate the energetics accounting tool developed under the business plan's efficacy in predicting shorebird and waterfowl bird use days increased due to improved or increased habitat. NFWF also intends to use the data collected to track progress towards the Great Lakes Business Plan wetland habitat goals below. The target year for achieving these goals is 2025.

Wetland habitat goals to be addressed through this contract include:

- Increase the carrying capacity of restored shorebird habitat, providing sufficient energy to support approximately 80,000 more shorebirds during the fall migration period
- Increase the carrying capacity of restored waterfowl habitat, providing sufficient energy to support approximately 80,000 more waterfowl during the spring migration period

In the Great Lakes Business Plan (Business Plan), NFWF's bird-related goals were put in terms of the amount of additional energy made available to birds during migration through wetland restoration. To measure this, NFWF's M&E Plan includes an energetics accounting tool for calculating the increase in bird use days made possible through restoration (see Appendices K and L).

Monitoring will help NFWF understand 1) whether the expected gains in bird use days (as assessed through energetics accounting) are actually occurring for shorebirds and waterfowl, 2) whether marsh-nesting bird populations are increasing in response to NFWF restoration efforts (particularly invasive species control), 3) which restoration activities have the greatest impact on abundance and occupancy, and 4) how the individual indicator species are responding to NFWF interventions at investment sites. NFWF has a desire to

apply these results to other unmonitored investment sites as appropriate to understand the cumulative impact of NFWF investment across the region in the future.

SCOPE OF WORK

Tasks

- 1. Create a monitoring and evaluation work plan to assess migratory shorebird, waterfowl and marsh-nesting bird (with particular emphasis on indicator species) presence and response to restoration efforts (abundance, occupancy etc.).**

The goal of this contract is to adapt and implement a monitoring and evaluation approach that will allow for future expanded implementation of the protocols to quantify the impacts of NFWF investment sites on migratory birds and marsh-nesting throughout the Great Lakes region. Plan pre and post implementation monitoring (according to M&E plan recommended schedule) of a selected subset of restoration sites to examine outcomes of NFWF investment. Site monitoring should include at minimum measures of habitat quality (i.e. ratio of invasives to natives and % plant cover) for, species abundance, species occupancy, and counts of migratory shorebirds and waterfowl. NFWF intends to use these data to verify assumptions in NFWF's [energetics accounting model](#) and to measure impact on key indicator species.

The plan should include: 1) recommended sampling methodology for each bird group, building from and incorporating the recommendations in the M&E Plan; 2) detailed annual timeline for monitoring, evaluation and reporting activities (see schedule for reporting needs); and 3) pre-monitoring coordination with NFWF to select sites and confirm approach and post-monitoring coordination with NFWF to review data and identify additional needs for reporting and/or data manipulation.

As mentioned, pre-monitoring analysis will be required to determine 1) the number of sampling sites required to assess habitat conditions in each land cover type of NFWF's investment sites; 2) the most efficient spatial extent of those sites across the geographic footprint of NFWF's investment sites; 3) the number of points or transects in each sampling site; and 4) the frequency of visits to each sampling site. Building off the recommendations in the M&E pan, the offeror should coordinate with NFWF staff at the initiation of the contract to review investment sites and select monitoring locations.

- 2. Implement monitoring and evaluation of migratory shorebird, waterfowl and marsh-nesting bird response to restoration efforts at investment sites.**

The general methodological approach for monitoring should follow standard operating procedures (SOPs) established by recognized regional monitoring efforts, such as the Integrated Waterbird Management and Monitoring (IWMM) Manual Version 8 (see http://iwmmprogram.org/wp-content/assets/downloads/monitoring_manual.pdf), the Coastal Wetland Monitoring Program and/or Birds Canada's Marsh Monitoring Program. Using these standardized protocols will ensure data gathered across projects are compatible with other monitoring efforts. While the IWMM SOPs provide detailed guidance about how these surveys should be conducted, we provide here a brief summary of the approach, as well as some key considerations to help the offeror understand what is needed, and key things to keep in mind while developing the monitoring plan.

- In general, bird population surveys need to be conducted before and after project completion to set baseline estimates and to estimate utilization rates during the peaks of fall migration by shorebirds, summer breeding season for marsh-nesting birds, and spring migration by waterfowl. Post-project implementation, surveys should occur after three and five full growing seasons to allow restored habitat time to mature. To enable comparisons across projects, all sampling should be done at consistent time intervals relative to project completion.
- All birds should be identified to species when possible, or at least correctly assigned to a bird guild associated with each habitat type.
- Counts should be estimated from a minimum of 3 complete surveys conducted 7–10 days apart during the peak of the migration period for shorebirds and waterfowl. Shorebird sampling should coincide, if possible, with that of the International Shorebird Survey to synchronize regional monitoring efforts (see <https://www.manomet.org/program/shorebird-recovery/international-shorebird-survey-iss>). Marsh bird surveys should be conducted to optimize detection of sora/Virginia rails and other secretive species as with acoustic monitoring as well as visual detection methods. Monitoring marsh birds with passive acoustic recording units (ARU's) and/or other related technologies are of interest to NFWF and we ask that offerors present an approach to monitoring marsh-nesting birds that incorporates ARU's in a pilot context and on a subset of sites, either directly from the offeror if appropriate or through a sub contract. Resources for equipment purchase are available if needed.
- Habitat types should be mapped concurrently with the bird population surveys or acquired from the NFWF grantee managing the project; this is particularly important in the context of this program, where habitat measurements will be used for energetics accounting. In addition, habitat quality assessments, including seed head assessments, should be conducted wherever practical.

Deliverables:

- A written monitoring and evaluation approach (annual) that describes the methods used to determine site selection, sampling intensity and frequency across investment sites to implement protocols and builds off recommendations in the M&E Plan
- Field implementation of evaluation and monitoring approach
- Coordinate with other regional monitoring efforts to ensure data collection methodology is aligned, data is shared appropriately to and from NFWF/offeror, and stakeholder coordination is reflected in final reporting. Monitoring efforts to be considered include: Great Lakes Coastal Wetland Monitoring Program, Marsh Monitoring Program (Birds Canada) and International Shorebird Survey.
- Upon the completion of each sampling season (spring, summer, fall), NFWF expects a summary of preliminary results to be delivered within one month of the completion of survey activities to be used in NFWF partner and board of trustee updates and presentations. Preliminary finding summaries should include site-specific analysis of data collected regarding counts, observable trends, indicator species status and comparative analysis with previous datasets to identify trends.
- A formal, annual report should be delivered to NFWF summarizing the full sampling year's outcomes. This is to be a detailed analysis accompanied by sharing of raw data with NFWF. The analysis should offer site-level insights and document observable trends across NFWF investments if appropriate. Indicator species status and response should be called out specifically as well as other key insights gleaned from survey and evaluation activities. Offeror should recommend timing for delivery of annual report in their protocol/schedule.

- Raw data provided spreadsheets, text files or a database Spreadsheets should be in Microsoft Excel, and Microsoft or open-source software will be acceptable for databases.
- Any additional quantitative tools that could support future monitoring efforts, such as code written in an open-source programming language like R or Python, or Excel calculators used during analysis.

Schedule:

- NFWF anticipates a start date of August 17, 2020 and end date of December 30, 2023 for the overall contract.

REQUIRED EXPERTISE AND PROPOSED STAFF

The proposed team must include 1) a senior staff member with expertise in study design, population biology, bird ecology, and spatial data; 2) a staff member who has on-the-ground restoration experience to ground truth the evaluation protocols and incorporate a practical understanding of migratory and marsh-nesting bird restoration actions and species response. Junior staff can be used to support the senior staff member in the implementation of monitoring activities in the field using established protocols. When you submit your cost proposal please identify the individuals who will work on this project and their previous experience working with NFWF. NFWF reserves the right to approve or reject any staffing selections that are made after this contract is awarded. The contractor selected to conduct the surveys should have the following qualifications:

- Experience conducting wetland bird surveys and proficient in the identification of fall-migrant shorebirds, spring migrant waterfowl, and marsh-nesting birds from a distance with the aid of optical and/or acoustic monitoring equipment
- Experience classifying wetland and deepwater habitats, and identifying common wetland plants
- Proficiency in habitat mapping and interpretation of aerial photographs
- Proficiency with accurate field and data entry, and proofing with a computer software (i.e., MS-Excel or MS-Access)
- Have staff located within the Great Lakes region and/or able/willing to travel to project sites for survey work

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 tasks 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 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: 20%



4. **Contractor's Past Performance.** The proposal should include information on the primary investigator(s)'s past performance experience in the bird ecology and wetland/marsh restoration in the Great Lakes. 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.

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 Quotations, or in subsequent correspondence (if the issue becomes known after the submission of the Statement of Quotations) 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 an 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

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 NFWF Aislinn Gauchay aislinn.gauchay@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.
- 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. **Budget:** 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.

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 24, 2020

Deadline for questions about the solicitation to NFWF. Offerors should submit questions regarding this solicitation via email to Aislinn Gauchay aislinn.gauchay@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 [Central Time] on Wednesday, July 24, 2020.**

July 28, 2020

NFWF will post the questions submitted regarding the solicitation and responses on the NFWF website at www.nfwf.org/greatlakes.

August 7, 2020

Deadline for receipt by NFWF of proposals. Proposals must be sent electronically as an email attachment to **Aislinn Gauchay** aislinn.gauchay@nfwf.org **by 5:00 PM [Central Time] August 7, 2020.** Proposals must be provided in Word format or searchable PDF.

August 17, 2020

Contract award to selected Offeror

December 30, 2023

Deliverables Due