



**REQUEST FOR PROPOSALS**  
**February 23, 2021**

***Contract for a Midpoint Evaluation of  
the National Fish and Wildlife Foundation's Great Lakes Business Plan***

**OVERVIEW**

The National Fish and Wildlife Foundation (NFWF) seeks a qualified Contractor to evaluate the performance of its Great Lakes Business Plan. The Great Lakes Business Plan outlines a comprehensive strategy to guide NFWF investments in the Great Lakes basin through 2025. The plan was developed in 2015 to advance the priorities of the federal Great Lakes Restoration Initiative (GLRI) and other restoration efforts across the region. It identifies a clear set of measurable outcomes to help ensure that investments are strategically directed and provides a framework to facilitate leveraging of public and private resources. You can obtain a copy of the Business Plan on NFWF's website, <https://www.nfwf.org/sites/default/files/greatlakes/Documents/great-lakes-business-plan.pdf>.

**BACKGROUND**

The scope of work under this contract is for a midpoint evaluation of the Great Lakes Business Plan. 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 ecosystem and community resilience in response to historic and emerging threats such as climate change, habitat degradation and fragmentation, and urban and agricultural runoff. Four competitive grant programs contribute to the goals of the Great Lakes Business Plan: the Sustain Our Great Lakes program (SOGL), Chi-Cal Rivers Fund (Chi-Cal), Southeast Michigan Resilience Fund (SE Michigan) and Conservation Partners Program (CPP).

Since the Business Plan's adoption, the programs contributing to its outcomes have experienced both growth and change. New funders have come to the table in regional collaboratives, focused on enhancing community resilience, water quality, and access to and use of natural areas and greenspace through urban habitat and stormwater investments. Existing partners have increased support for invasive species control efforts, green stormwater infrastructure, and working lands conservation practices and regenerative agriculture. The evaluation will consider at least 170 grants totaling more than \$39 million. These grants were awarded between 2016-2021 and contribute to the Great Lakes Business Plan. NFWF intends to use the evaluation's results to adaptively manage the Great Lakes Business Plan and contributing programs to increase their efficacy and impact toward species, community and natural resource goals for the region and to advance the broader goals of the Foundation, as articulated in NFWF's strategic plan.

**SCOPE OF WORK**

The Scope of Work for this contract is for a midpoint evaluation of the Great Lakes Business Plan that focuses on the evaluation questions listed below. The Offeror should propose a technical approach for conducting the evaluation that clearly describes robust and appropriate methods for answering these questions.

1. What types of projects have yielded the greatest conservation benefits, in terms of addressing the specific goals of the Great Lakes Business Plan? What outcomes have they yielded?
2. How sustainable are the conservation outcomes of NFWF's projects? What steps are grantees taking to support the outcomes' long-term sustainability? What risks to sustainability remain?

3. Are there common characteristics of projects that make significant contributions to the Great Lakes Business Plan goals? Are certain types of projects less successful or less cost-effective?
4. To what extent does the Great Lakes Business Plan align with new funding that became available after the plan was written (see Background) or are there gaps in its goals and strategies? If so, which areas of the business plan could be adjusted to better reflect the impact of all NFWF's investments (e.g., those yielding community benefits)?

NFWF will provide the selected Contractor with the following information:

- Records of grant awards – amounts awarded, project descriptions and grantee information;
- Project reports for specific grants, as needed
- Map of business plan boundaries, focal areas and grant locations
- Metrics data from NFWF's EasyGrants database
- NFWF's Great Lakes Business Plan
- NFWF's Monitoring and Evaluation Plan for the Great Lakes and supporting information that has informed its approach to monitoring species outcomes, including an energetics model for estimating bird outcomes and a brook trout conservation portfolio analysis.

**Tasks:**

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

**Deliverables:**

- Monthly high-level written summaries of progress and key findings to NFWF (throughout contract term)
- Draft report for NFWF review and feedback (March 2022)
- Final presentation to NFWF (April 2022)
- Final presentation to NFWF and key Great Lakes funding partners (April 2022)
- Final report for NFWF staff and Board of Directors (May 2022)
- 2-page summary of the evaluation results for NFWF's Board of Directors (May 2022)

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 May 1, 2021 and completion date is May 31, 2022. Offeror should include a project schedule for tasks and major milestones in the proposal.

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

The successful offeror must have significant expertise in program evaluation in the field of wildlife conservation, as outlined below. Joint proposals from a prime and sub-contractors 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 wildlife conservation programs
- 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 evaluation. This section should also 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.** The proposal should include information on the primary investigator(s)'s past experience in program evaluation, especially in the field of wildlife conservation. 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 the 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 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**

Proposals must be submitted under the same cover at the same time, in four distinctly labeled and separate documents: 1) Technical Proposal, 2) Budget, 3) Example report and 4) Evidence of Financial Stability.

Interested parties should submit proposals electronically to NFWF (Annamarie Lopata, Senior Evaluation Officer; [Annamarie.Lopata@NFWF.ORG](mailto:Annamarie.Lopata@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 (not part of the 10-page limit).
- References: List two clients who have received services from the applicant that are similar in nature to the proposed work; include names, phone numbers, and email address.
- Example: Evaluation report on a similar topic, attached with your proposal.

2. **Budget:** The budget proposal must be submitted using the [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, and program partners 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**

<p><b>March 5, 2021</b></p>	<p>Deadline for questions about the solicitation to NFWF.</p> <p>Offerors should submit questions regarding this solicitation via email to Annamarie Lopata; <a href="mailto:Annamarie.Lopata@NFWF.ORG">Annamarie.Lopata@NFWF.ORG</a>. NFWF will post all the questions and responses on its website 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 <b>no later than 5:00 PM EST, March 5, 2021</b></p>
<p><b>March 10, 2021</b></p>	<p>NFWF will post the questions submitted regarding the solicitation and responses on the NFWF website <a href="#">here</a>.</p>
<p><b>March 24, 2021</b></p>	<p>Deadline for receipt by NFWF of proposals.</p> <p>Proposals must be sent electronically as an email attachment to Annamarie Lopata; <a href="mailto:Annamarie.Lopata@NFWF.ORG">Annamarie.Lopata@NFWF.ORG</a> by <b>5:00 PM EST, March 24, 2021</b>. Proposals must be provided in Word format or searchable PDF.</p>
<p><b>May 2021</b></p>	<p>Contract award to selected Offeror</p>
<p><b>May 31, 2022</b></p>	<p>Deliverables Due</p>