



Request for Quotations Support for Transaction Monitoring & Evaluation Effectiveness

OPPORTUNITY & OVERVIEW

The National Fish and Wildlife Foundation (NFWF) seeks a qualified Contractor to support the Columbia Basin Water Transactions Program (CBWTP) with developing a framework for monitoring, assessing and reporting the effectiveness of water transactions.

The CBWTP funds water transactions development and implementation in the United States portion of the Columbia Basin and is the largest instream flow restoration program in the country. Since its inception in 2002, the CBWTP has implemented over 643 water transactions and secured 12.5 million acre-feet of water in flow-limited tributaries of the Columbia River Basin. The CBWTP works across portions of Oregon, Washington, Montana and Idaho, and its investments in water transactions have increased stream flows for the benefit of native fish species, including Pacific salmon, steelhead trout, and resident fish species. You can find more detail on the program goals and overview on NFWF's website, <https://www.nfwf.org/programs/columbia-basin-water-transactions-program>.

Funding for this program is primarily provided by Bonneville Power Administration (BPA). The funding from BPA may include areas of the Columbia River basin that are covered by the Columbia Basin Fish Accords. One award will be made for this contract. The period of performance is anticipated to be from date of the award to September 30, 2021, with the possibility to extend in annual increments, pending satisfactory completion of tasks and funding availability.

SCOPE OF WORK

NFWF seeks a qualified contractor to review and assess existing CBWTP monitoring efforts and make recommendations for changes to data collected and data collection processes. The goal is to efficiently compile, analyze, and report out on monitoring data for the purposes of both program improvement and program accountability. Monitoring data and analyses should be able to inform adaptive management of the program and be able to justify efforts and dollars spent in certain streams and/or subbasins. The following tasks constitute the Scope of Work for this Request for Quotations. The contractor should anticipate at least bi-monthly check-in calls with NFWF throughout the duration of the project to discuss progress, address challenges, and develop a strategy for future efforts. Please provide time and cost quotes for each task using the Contractor Budget Template provided in addition to a budget for the current period of performance (through 9/30/21).

CBWTP Monitoring Workplan

To understand the ecosystem response to flow investments in the basin, NFWF developed a systematic approach to assessing and tracking the conservation benefits of restored water known as the [Flow Restoration Accounting Framework \(FRAF\)](#). Since its implementation in 2015, this flow accounting framework allows public and private stakeholders to better track progress towards defined conservation objectives for water restoration projects and transactions. Although the FRAF is available to draw from, it does not prioritize enough among the numerous monitoring and data collection activities. The contractor will develop an implementation plan for monitoring flow transactions which prioritizes data collection for addressing NFWF and BPA's most critical information needs for the CBWTP. Monitoring and adaptive management are two primary tools



used to determine if the program goals shown below are being achieved and to demonstrate the importance of flow transactions for native fish species.

Program goals:

- ❖ Enhance streamflow to benefit species of concern (ESA-listed species, state species of concern, etc.)
- ❖ Secure water for in-stream tributary flows at a location(s) where low flows are a limiting factor to fish survival, productivity, and distribution and for the maximum reach of river legally and physically possible.
- ❖ Demonstrate innovative methods that increase tributary flows or the development of new transaction strategies for tributary flow enhancement during critical periods for targeted species
- ❖ Monitoring of instream water transactions in accordance with the FRAF
- ❖ Progress towards instream flow targets, integration with other habitat actions.
- ❖ Collaborate efforts with other entities and document how opportunities for cost-sharing, data sharing, and collaboration were considered and developed
- ❖ Move beyond proof-of-concept and focus on quantitative analysis and adaptive management

Task 1: Become familiar with the purpose of the CBWTP, program funder requirements, water transactions previously implemented, current data collected and monitoring protocols, and other NFWF data collection tools, including NFWF’s water calculator, and identify essential program improvement and reporting needs.

Description: The contractor will review program documents, including the Flow Restoration Accounting Framework, previous grantee monitoring workbooks, the CBWTP database, NFWF’s water calculator, state agency gauge data and other NFWF-provided documents. Selected contractor should build relationships with CBWTP Qualified Local Entities (QLE) to ensure proper submission of data and maintain ongoing communication. NFWF will provide the contractor data on CBWTP water transactions, while the contractor will be responsible for obtaining additional data on gauge locations and state agency.

Deliverables:

- Prepare a clear written summary of NFWF and BPA organizational needs for monitoring, including the extent to which the data needs to be publicly accessible, based on interviews and document review. The contractor should anticipate at least two rounds of NFWF review. Due date: 9/15/2021

Task 2: In collaboration with NFWF staff, recommend a monitoring workplan for efficiently compiling and analyzing data for program improvement and reporting, and integrating them into CBWTP data management systems.

Description:

Create a monitoring workplan to provide guidance on program standards for monitoring of CBWTP water transaction investments. Where appropriate, the workplan should build upon previously developed monitoring standards from the Flow Restoration Accounting Framework, but should make improvements and efficiencies where necessary to prioritize NFWF and BPA’s monitoring needs. In addition, the monitoring workplan should recommend approaches for obtaining data which can be readily incorporated into NFWF’s water and carbon calculators, as relevant. The workplan should include recommendations for

who is responsible for data collection, how that data is stored, and how it is analyzed and reported. The extent to which data is publicly accessible will need to be documented and a methodology on how to access this data will need to be developed. The selected contractor will need to work closely with NFWF to ensure that the plan developed meets program needs. The developed approach will need to consider legal requirements and what is needed to be monitored in order to address them.

Deliverables:

- Monitoring workplan which outlines primary questions to be answered, data to be collected, who collects, how to compile, timing, assessment of the level of effort to compile monitoring data, how rigorous the data collection will need to be (e.g., ranging from self-reported to third-party validated). The contractor should anticipate at least two rounds of NFWF review. Due date: 1/15/2022 (*contingent upon renewal of contract*)

Task 3: Implement the agreed-upon approach developed in Task 2 to compile, analyze, and clearly report out CBWTP data for the purposes of adaptive management and reporting to BPA and other audiences.

Note: Offerors should include this task in their proposal scope of work and budget; however, and at NFWF's discretion, the specific deliverables under this task will be dependent on satisfactory completion of Task 2. As time and resources allow, NFWF will work with selected Contractor to amend the contract to include mutually agreed upon deliverables for Task 3 prior to commencement of this task.

Description: This task will include developing annual reports for BPA, creating GIS layers based on QLE transaction data, participating in review of proposed water transactions, and making recommendations for adaptive management. Deliverables should include simple visuals to translate complex data and concepts for a variety of audiences. Contractor will present information and findings at various NFWF/BPA meetings and/or webinars. It may include site visits or data collection on a limited basis. Offerors should propose deliverables that build on the approach outlined in Task 2. All assumptions should be clearly articulated in the proposal and associated budget. All preliminary products should be presented to and reviewed by NFWF staff prior to finalization. The Contractor will then incorporate feedback from NFWF staff and submit final deliverables via Sharefile to NFWF staff.

Deliverables:

- FY21 Combined Compliance, Habitat, and Research Monitoring and Evaluation report
 - Compliance reporting which should include review of documentation of non-use of water provided by grantees
 - Metrics achieved by basin and analysis of (i.e., acre feet and cubic feet per second restored tributary reconnects, etc. for up to 250 or more water transactions on 100 streams
 - Integration of habitat and biological data where available and relevant for project streams
 - Adaptive management actions taken and recommendations for future
 - Examples of successes or progress made for high level audience
- FY21 GIS Layers



- Develop and Manage an online GIS mapping tool that NFWF and BPA can access, which shows each transaction along with the associated metrics, years instream, cost, and associated habitat restoration work.

Schedule: Deliverables will need to be completed on an annual basis. The tentative schedule for the remainder of 2020 and 2021 deliverables is below:

NFWF Report	Contractor Due Date
Summary of NFWF/BPA Organizational Needs and Workplan	9/15/2021
Below Deliverables TBD - FY22 (contingent upon renewal of contract)	
Monitoring Workplan	1/15/2022
FY21 Combined Compliance, Habitat, and RM&E Report (analysis of 2020 and 2021 data)	6/1/2022

REQUIRED EXPERTISE AND PROPOSED STAFF

A. Knowledge and track record: Applicants must demonstrate expertise and experience with hydrology and instream flow transactions, monitoring, data collection, analysis, and management

B. Experience in CBWTP region: Preference will be given to providers who have experience working in or are otherwise familiar with the Columbia River Basin and specifically within subbasins that have been identified as priorities for flow and fisheries restoration by federal, Tribal, and state agencies.

C. Capacity and flexibility to deliver services: Providers must demonstrate that they have a degree of flexibility in how and where services are delivered, and that they have the ability to tailor content and delivery methods to meet the specific needs of the CBWTP.

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: 30%
- 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 requested field. 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 effort.
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: 20%

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 the CBWTP Program Manager, Kate Morgan (Katherine.Morgan@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. (Embedded tables can use a different font size from 11pt; however, please ensure the size is sufficiently large for readability.) Note: The only section of the proposal that has a page limit is the work plan narrative (maximum of 5 pages).
- Contact information: Primary contact person, company name, address, phone, email, website, DUNS number, and EIN/Taxpayer ID#.
- Workplan Narrative: Concise (5-page limit) description of the work plan.
- Past experience: Summarize the applicant's expertise and experience. List recent (last 2-5 years) accomplishments and previous services related to this proposed effort.
- 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](#). Two budgets must be submitted with the application:

- **Budget for Current Period of Performance** – Detail the hours, personnel, and tasks needed to complete task one within 9/30/21.
- **Overall Budget for Complete Scope of Work** – Provide a budget estimate for all tasks described above, including the hours, personnel, and tasks needed.

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

- April 22, 2021** Deadline for questions about the solicitation to NFWF. Offerors should submit questions regarding this solicitation via email to **Kate Morgan (Katherine.Morgan@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 PST / 8:00 PM EST on April 22, 2021**
- April 27, 2021** NFWF will post the questions submitted regarding the solicitation and responses on the NFWF website.
- May 11, 2021** Deadline for receipt by NFWF of proposals. Proposals must be sent electronically as an email attachment to **Kate Morgan (Katherine.Morgan@nfwf.org)** by **5:00 PM PST / 8:00 PM EST May 11, 2021**
- Early June 2021** Proposals must be provided in Word format or searchable PDF. Contract award to selected Offeror, Immediate start date for deliverables under Task 1