

Request for Quotes
Southern Appalachians Spruce Restoration Initiative
Facilitation and Project Planning Services
Southern Appalachian Subregion

Background and Statement of Work:

The National Forest Foundation (NFF), in partnership with the Southern Appalachian Spruce Restoration Initiative (SASRI)¹ and the United States Forest Service (USFS or Forest) requires focused, long-term capacity to expand the pace and scale of spruce restoration work across Virginia, North Carolina, and Tennessee on federal, state, tribal and private lands.

SASRI is a partnership of diverse interests with a common goal of restoring spruce-fir ecosystems across the high elevation landscapes of the Southern Blue Ridge. It is comprised of private, state, federal, and non-governmental organizations which recognize the importance of this ecosystem for its ecological, aesthetic, recreational, economic, and cultural values.

The Southern Appalachians are home to 49 of the fifty highest peaks in the eastern United States. These form several high elevation mountain ranges (i.e., sky islands) that support habitats and species unique to the Southern Appalachians, including high-elevation boreal type forests of endemic Fraser fir as well as red spruce at its southernmost extent on the continent. These systems are ranked G1 by NatureServe and are considered the 2nd most endangered forested ecosystems in the United States. In the wake of industrial logging and associated stand-replacing wildfires in the early 20th century, the extent of these conifer forests was greatly reduced (>60%) and soil conditions were altered thereby hindering natural regeneration.

In subsequent years, although natural regeneration of these forests was slowly reclaiming former habitat, red spruce and Fraser fir forest was further degraded by human-caused atmospheric deposition, an introduced invasive insect, the balsam woolly adelgid (*Adelges picea*), and southern pine beetle (*Dendroctonus frontalis*). One hundred years after the era of destructive logging, these forests have not recovered near their potential distributional extent, but collaborative momentum is building to restore red spruce and Fraser fir in these sky islands through SASRI.

SASRI's goals are to: 1) Restore spruce to natural abundance in ecologically appropriate locations where canopy density has been reduced; 2) Develop capacity to store seed and grow genetically appropriate spruce seedling to support resilient restoration projects in the face of climate change; and 3) Continue refining mapping and field criteria to determine appropriate restoration sites with new research and continued assessment of existing data.

SASRI is comprised of a Steering Committee led by two Co-Chairs, as well as sub-teams focused on Development, Communications, Propagation, and Restoration Techniques to aid and input in

¹ <https://southernspruce.org>

project design and reporting. Across the Southern Appalachian geography, SASRI has divided up teams that focus on planning and implementing restoration on each of the Sky Islands. SASRI also coordinates closely with its sister organization, the Central Appalachian Spruce Restoration Initiative (CASRI)² on landscape scale restoration.

The NFF is coordinating with SASRI to procure services to facilitate this group, ensure it is on track to achieve its goals, and support group accountability. The required services fall within the following categories and their natural extensions: group facilitation, project planning and scoping, notetaking, record keeping, project management, and partnership management. To develop a streamlined, fundable project portfolio of spruce restoration projects, it will be critical that SASRI coordinates closely within the broader multi-agency networks that currently administer restoration projects, agreements, and contracts across the USFS Southern Appalachian Subregion.

Information Requested

If interested in submitting a bid for this project, please provide a quote or proposal for the above statement of work by providing:

- proposed approach
- work experience
- cost
- capacity for this project
- experience in similar projects

Specific requirements are detailed below.

I. PROJECT OVERVIEW AND REQUIREMENTS

General Specifications

(a) Description of Work – This Request for Quotes is for facilitation and project management services related to SASRI Facilitation and Project Management, including the following tasks and subtasks:

1. Assist with and participate in the following SASRI meetings to maintain group cohesion and progress, including agenda development, meeting preparation, meeting facilitation, notetaking, resource gathering, and follow up by tracking action items, deliverables, and commitments established during the meeting:
 - i. Steering Committee (Quarterly, virtual)
 - ii. Communication & Development (Quarterly, virtual)
 - iii. Restoration Technical (Quarterly, virtual)
 - iv. Sky Islands (as scheduled, virtual or in person)
 - v. Meet with the NFF Team to discuss SASRI updates and prepare for future SASRI meetings (monthly, virtual, half-hour)
 - vi. Meet with SASRI Co-Chairs, either virtually or in person as necessary (monthly, virtual or in person)

² <https://restoredspruce.org>

2. Manage document sharing platform (Box folders and/or SASRI website in conjunction with website holder), including updating SASRI member records, uploading meeting notes, and adding resources brought up during meetings.

3. Facilitate SASRI Sky Island Team and Sub-Committee meetings and their implementation of the SASRI Restoration Plan
 - i. Assist with the SASRI Sky Island Teams and sub-committee's ecological assessment of each sky island for restoration potential, including but not limited to providing necessary planning tools, maps, materials, etc. to develop targeted restoration areas and a sequence of restoration.
 - ii. Assist with each SASRI Sky Island Team and sub-committee's identification of restoration potential, including but not limited to identify land ownership across the site, identify state and federal compliance laws in effect at the site, identify any conservation easement conditions, ensure alignment with existing management/conservation plans.
 - iii. Assist with SASRI members' development of resources for restoring each site, including but not limited to best restoration practices for the site (e.g., planting, release of understory spruce and fir) and identify what types and amounts of resources are needed for each site to fulfill restoration needs.
 - iv. Assist SASRI with recruiting and onboarding new Sky Island team members and leads.

4. Coordinate and organize update of 2014 SASRI Red Spruce Restoration Plan.
 - i. Track SASRI Red Spruce Restoration Plan progress and determine tasks needed to bring the Plan into an actionable roadmap using the priorities determined by working with the Sky Island teams and other Committees.
 - ii. Ensure each SASRI Red Spruce Restoration Plan task has a SASRI lead.
 - iii. With the task leads, evaluate and coordinate updates to produce a current SASRI Red Spruce Restoration Plan that contains a five-year implementation roadmap that is the culmination of the prerequisite assessment and prioritization process.
 - iv. Coordinate with leads to update budget and facilitate conversations during SASRI meetings to address funding gaps.
 - v. Coordinate with Southern Conservation Blueprint staff so project results can inform future Blueprint updates.
 - vi. Include traditional ecological knowledge from the Eastern Band of Cherokee Indians natural resources department and other tribal members, drawing upon results from the Tribe's 2022 America the Beautiful grant entitled "Advnisdsgi: A Cherokee Planning Project for Conservation Across Jurisdictions."
 - vii. Include new guidance from the subregional NEPA decision covering red spruce restoration on Forest System lands in the Southern Appalachians.

5. Lead and coordinate grant writing among SASRI partners
 - i. Plan for the writing of a 2025 America the Beautiful RFP and other additional funding opportunities in conjunction with other SASRI members where appropriate.

The Contractor shall identify what they can supply in terms of materials, labor, equipment, supplies, supervision, quality control, and incidentals required to complete the work described. The Contractor shall perform all work in a safe and conscientious manner.

(b) Project Location – Most SASRI member meetings are hosted virtually via Zoom or Microsoft Teams. In-person meetings and travel would be expected to participate in the SASRI Annual Members Meeting and other required field work in the Southern Apps.

(c) Work Schedule –

1. Expected period of performance – The desired duration of the performance period sought will be a minimum of one year depending on contractor availability and budget. Contractors must propose their schedule based on their availability to meet these requirements. There is a possibility of an extension or renewal of the contract, whichever may be more appropriate, depending on available funding.
2. Meeting frequency
 - i. SASRI Steering Committee (quarterly)
 - ii. Sub-Groups (quarterly/ad hoc)
 1. Development & Communications* (*currently one group hoping to split into two when time is right)
 2. Restoration Technical
 3. Research & Monitoring
 4. Propagation
 - iii. Sky Islands (quarterly/ad hoc)
 1. Unaka
 2. Roan
 3. Great Balsam
 4. Black Mountain
 5. Plott Balsams
 6. Great Smoky Mountains
 7. Virginia Highlands
 - iv. NFF + Forest + SHR (monthly)
 - v. Other meetings as appropriate
3. The SASRI Annual Meeting, Asheville North Carolina; (2 days, in-person) November 5-6, 2024

Insurance Requirements

Upon selection of the winning bid, the Contractor agrees that it has and shall maintain the following insurance coverage indicated below. The effective date of all coverage shall precede the start of any work.

- a. State minimum workers' compensation insurance coverage for its employees, if any.
- b. Broad form general liability, property damage, and automotive liability insurance in the minimum amount of \$1,000,000 for bodily injury, death, or damage to property of any person and \$2,000,000 for bodily injury, death, or damage to property of more than one person. The Contractor shall name NFF an Additional Named Insured and

provide NFF with a certificate of insurance evidencing such coverages, prior to the initiation of the Scope of Services.

Prohibited Telecommunications Services and Equipment

The Contractor is responsible for compliance with the prohibition on certain telecommunications and video surveillance services or equipment identified in 2 CFR 200.216.

Payment/Performance Security

Contractor shall post cash, a letter of credit, bond, or other financial security that is easily convertible into cash in a form acceptable to the NFF, in its sole determination, to assure completion of the work required under any subsequent agreement and payment of all amounts lawfully due to all persons supplying or furnishing to the Contractor or Contractor's subcontractors with labor, laborers, materials, rental machinery, tools or equipment used or to perform the work. Contractor may incorporate required associated costs into mobilization costs or other approved expenses.

- a. If the value of the agreement is in excess of \$250,000, Contractor will be required to post financial security in a form acceptable to the NFF in the amount of 5% of the total agreement value up to \$250,000 in total financial security.

Federal Exclusion Verification

The selected Contractor will be required to affirm that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Federal Flowdown Provisions

Flowdown Requirements: Any Agreement associated with this RFP may be subject to flowdown requirements under associated federal or state funding agreements, which are included and attached as Appendix A.

II. REQUIRED COMPONENTS

Technical Proposal

Please provide a detailed technical approach to the work which would include the facilitation approach and project management approach.

Contractor Qualifications

- a. Past Experience – Please provide a brief explanation of previous work experience with facilitating diverse stakeholder groups and managing similar project work.
- b. References – Please provide three professional references that can speak to past performance.

- c. Contractor Capacity – Please provide a brief explanation of your capacity to accomplish the deliverables.

Pricing Schedule

Contractor shall price work according to the schedule below. Prevailing wages are required per conditions of funding sources.

Task/Item	Units	Unit Cost	Extended Cost
Task 1: Assist with and participate in the following SASRI meetings			
Task 2: Manage document sharing platform			
Task 3: Assist SASRI Sky Island Team and Sub-Committees with their updates to and implementation of the SASRI Restoration Plan			
Task 4: Coordinate and organize update of the 2014 SASRI Red Spruce Restoration Plan			
Task 5: Lead and coordinate grant writing among SASRI members			
		Total Bid	

III. SUBMISSION, EVALUATION, AND CONTACTS

Contractor Selection Process

This is a request for quotes only and bids furnished are not offers from the National Forest Foundation. This request does not commit the National Forest Foundation to pay any costs incurred in the preparation or submission of the quote or to contract for supplies or services.

The NFF will use the Evaluation Factors below to review each submitted bid. Based on the outcomes of that selection process, the NFF will notify successful and unsuccessful bidders by September 13, 2024, and will prepare a separate contract document.

Contractor Selection Process

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- Price
- Previous Work History
- References
- Contractor Availability / Project Timeline

Point of Contact

Please submit any questions about the project in writing to the Point of Contact.

Rachel Blackburn
National Forest Foundation, Southern Appalachians Program Coordinator
rblackburn@nationalforests.org

Responses will be shared with known interested parties by email or otherwise posted at <https://www.nationalforests.org/rfp>.

Bid Submission

Submit bids via email to rblackburn@nationalforests.org by September 6, 2024.

Equal Opportunity Provider

In accordance with Federal law and U.S. Department of Agriculture policy, the National Forest Foundation is prohibited from discriminating on the basis of race, color, national origin, sex, age, religion, political beliefs, or disability.

Appendix A

NFF Funding Code: 1596085 thru 1596089

NFF Funding Name: PA Southern Appalachian Watershed

Funder Agreement ID: 23-PA-11083150-399

Flowdown Provisions

FLY AMERICA ACT.

The Fly America Act of 1974 (49 U.S.C. 40118) requires that all air travel and shipments under this award must be made on U.S. flag air carriers to the extent service by such carriers is available and when no Federal, statutory exceptions apply. The Administrator of General Services Administration (GSA) is authorized to issue regulations for purposes of implementation. Those regulations may be found at 41 CFR Part 301, and are hereby incorporated by reference into this award.

PROHIBITION AGAINST INTERNAL CONFIDENTIAL AGREEMENTS.

All non federal government entities working on this agreement will adhere to the below provisions found in the Consolidated Appropriations Act, 2016, Pub. L. 114-113, relating to reporting fraud, waste and abuse to authorities:

- a) The recipient may not require its employees, contractors, or subrecipients seeking to report fraud, waste, or abuse to sign or comply with internal confidentiality agreements or statements prohibiting or otherwise restricting them from lawfully reporting that waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.
- b) The recipient must notify its employees, contractors, or subrecipients that the prohibitions and restrictions of any internal confidentiality agreements inconsistent with paragraph (a) of this award provision are no longer in effect.
- c) The prohibition in paragraph (a) of this award provision does not contravene requirements applicable to any other form issued by a Federal department or agency governing the nondisclosure of classified information.
- d) If the Government determines that the recipient is not in compliance with this award provision, it:
 1. Will prohibit the recipient's use of funds under this award, in accordance with sections 743, 744 of Division E of the Consolidated Appropriations Act, 2016, (Pub. L. 114-113) or any successor provision of law; and
 2. May pursue other remedies available for the recipient's material failure to comply with award terms and conditions.