

Puyallup River Watershed Council

REQUEST FOR PROPOSALS

RFP 2020-09-29

Puyallup-White River Local Integrating Organization: LIO Coordination

September 29, 2020

RFP 2020-09-29

Puyallup-White River Local Integrating Organization: LIO Coordination

The Puyallup River Watershed Council (PRWC) is seeking proposals to facilitate the coordination of the Puyallup White River Local Integrating Organization and related efforts in support of Puget Sound recovery.

The successful proposer will be offered a contractual agreement through September 30, 2021. Additional funding is anticipated on an annual basis dependent on federal funding.

The project will require a contractor with documentable experience in Miradi conservation software, GIS proficiency, strong familiarity with Puget Sound recovery efforts and Local Integrating Organizations, stakeholder facilitation, and communication with the community, funders and decision makers.

I. REQUEST FOR PROPOSALS PLANNING SCHEDULE

<u>DATE*</u>	<u>ACTIVITY</u>
September 29, 2020	RFP Proposal Advertised
September 29, 2020	RFP Packet Available
October 15, 2020 at or before 4p.m.	Deadline for Proposals Received by PRWC
October 17-20, 2020	Respondent Interviews
October 21, 2020	Proposal Consideration – PRWC Executive Committee meeting
October 23, 2020	Proposal Selection
October 26 – November 1, 2020	Contract Negotiations
November 2, 2020	Services Begin
September 30, 2021	Contract Closeout

II. PURPOSE OF PROJECT

The PRWC was recognized by the Leadership Council in December 2018 as the Local Integrating Organization for the Puyallup-White Watershed (WRIA 10). The LIO is developing an Ecosystem Recovery Plan, which will be completed in 2021, under a different contract. This is a requirement by the Puget Sound Partnership to be an LIO. Other requirements exist to support the capacity of the LIO and its participants to contribute to regional ecosystem recovery efforts that include coordination with other LIOs, management conference, Partnership staff, and revisions to the Puget Sound Action Agenda. Funding for this project is secured on an annual basis, is dependent on federal funding, and comes from the EPA's National Estuary Program via the Puget Sound Partnership, in the form of LIO capacity funding. All funds must be spent by September 30, 2021. A contract is being secured for this work, which can be amended, if needed, based on negotiations between the selected candidate and PRWC. The approved Scope of Work is attached as Attachment A, and outlined in section III below – this is the work that we are seeking a consultant to execute.

III. ANTICIPATED SCOPE OF WORK

The LIO Capacity funds approved Scope of Work should be the basis for your proposal. It has five main tasks (and multiple subtasks), the first four of which are required by the Partnership, and the last one was selected by the LIO participants to support the local LIO and ERP completion/implementation, and is also required for this contract:

Task 1:

Organize, Support, Administer, Facilitate, and Coordinate a Local Integrating Organization

Task 2:

Advance Implementation of the 2018-2022 Action Agenda and Development of the 2022-2026 Action Agenda

Task 3:

Performance Management

Task 4:

Support Adaptive Management of LIO Ecosystem Recovery Plans

Task 5:

Tailor LIO coordination to Support Unique Vision and Goals of LIO

Deliverables for the project are described in Attachment A – Scope of Work, in the deliverables table, which was negotiated between the PRWC and LIO and the Puget Sound Partnership. Subtasks are included under each task in the narrative and deliverables table.

The successful proposer must:

- Have the ability to facilitate diverse stakeholders and competing interests across the watershed.
- Provide information or answers directly relating to all components of Section VI.C. (Proposal Content – Statement of Qualifications) and Section VI.D. (Proposal Content – Approach) below. The information provided as answers to these questions shall be considered the “**Anticipated Scope of Work**”.

IV. PROPOSAL GENERAL TERMS AND CONDITIONS

A. Authorship

Proposals developed with the assistance of organizations or individuals outside the bidder’s own organization should be identified. No contingent fees for such assistance will be allowed to be paid under any contract or grant resulting from this RFP. All proposals submitted become the property of PRWC, and it is understood and agreed that the bidder claims no proprietary rights to the ideas contained therein.

B. Independent Price Determination

The proposer guarantees that in connection with this proposal, the prices and/or cost data have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition.

C. Subcontracting

Proposers must include any plans for subcontracting services or activities during the program. It is understood that the contractor(s) is held responsible for the satisfactory accomplishment of the service or activities included in such subcontract. PRWC reserves the right to approve all subcontractors.

D. Rejection of Proposal

No applications (Proposals) submitted under this Request for Proposals (RFP) will be returned for correction or clarification. If the application is incomplete, it will be rejected. Oral, alternative, and late proposals will not be considered for selection. The PRWC reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified sources, or to cancel in part, or in its entirety, this RFP if it is in the best interest of the PRWC to do so.

E. Cancellation of Award

The PRWC reserves the right to cancel an award immediately if new state laws or policy determinations make it necessary to substantially change the project purpose or content or prohibit such a project.

F. Price Warranty

The proposer warrants that the rates quoted for services in response to this RFP are not unreasonably greater than the rates for the same services performed by the same individuals under any other existing contracts or grants.

G. Waivers

The PRWC reserves the right to waive specific terms and conditions contained in this Request for proposal. It shall be understood that any proposal is predicated upon the acceptance of all terms and conditions in the RFP unless the proposer has obtained such a waiver.

H. Nondiscrimination in Programs and Employment

It is the policy of the PRWC to encourage and support equal opportunity in employment.

No person shall, on the grounds of race, color, religion, sex, handicap, sexual orientation, gender identity, national origin, age, citizenship, political affiliation or belief, be denied employment or benefits, or be discriminated against as a participant, administrator, or staff person under any program or activity receiving funds from PRWC.

In compliance with Department of Labor Regulations implementing Section 504 of the Rehabilitation Act of 1973, as amended, no qualified handicapped individual shall be discriminated against in the admission, access, treatment, or employment in any program or activity.

The proposer agrees to comply with all provisions of the Americans with Disabilities Act and regulations interpreting or enforcing such Act.

The proposer agrees to provide equal opportunity in the administration of the contract, and its subcontracts, purchase orders or other agreements, and in the delivery of services to applicants/participants.

The proposer agrees to make every feasible effort to remove artificial barriers to employment, including, but not limited to, the elimination of sex stereotyping in employment and architectural barriers for the handicapped. Every effort shall be made to employ members of the eligible population in the staffing and administration of the project.

I. Addenda to the Request for proposal

In the event it becomes necessary to revise any part of this RFP, addenda will be provided to all proposers who received the RFP.

J. Publicity

No informational pamphlets, notices, press releases, research reports, or similar public notices concerning this proposal will be released by the proposer without obtaining prior written approval of the PRWC.

K. Limitation

This Request for proposal does not commit the PRWC to award a contract, to pay any costs incurred in the preparation of a proposal to this request, or to procure or contract for services or supplies.

L. Signature

The proposal shall be signed by an official authorized to bind the bidder and shall provide the following information: name, title, address, e-mail and telephone number of individual(s) with authority to negotiate and contractually bind the bidder, and who may be contacted during the period of proposal evaluation.

M. Confidentiality of Trade Secret Information

Any materials considered by the proposer to be of a confidential or trade secret nature will be so identified in the proposal. Materials so identified by the proposer will be reviewed by the selection team and the Board of Directors and returned to the proposer after negotiation and before execution of contract. Confidential information will be treated as protected material and will be considered exempt from Freedom of Information Act inquiries, according to Federal and State law.

N. Contract Award

The PRWC may award a contract based on proposals received; therefore, each proposal should be submitted in the most favorable terms from a budgetary, technical, and programmatic standpoint. The PRWC reserves the right to request additional data, discussion or presentation in support of written proposals. If no contract is agreed upon within 30 days of proposal selection, the PRWC may award the contract to the next highest-ranking proposal or choose not to make an award. The PRWC reserves the right to reject all proposals.

V. QUESTIONS

Questions regarding this Request for Proposal will be accepted by e-mail only at krystal.kyer@piercecountywa.gov

VI. PROPOSAL SUBMISSION

Proposals are due at or before 4:00PM on October 15, 2020. All responses to this Request for proposal (RFP) must be complete and meet the following minimum technical requirements to be further reviewed for project requirements.

By Mail:

Pierce County SWM
Attn: Krystal Kyer, LIO Coordinator
2702 S. 42nd St. Suite 201
Tacoma WA 98409

By E-mail (in PDF format): (preferred)

Krystal.kyer@piercecountywa.gv

Applications must be received by the PRWC no later than 4:00pm, October 15, 2020.

A. **Proposal Content - Length of Proposal**

The total length of your proposal cannot exceed seven (7) pages. You are permitted to submit the following information as attachments, over and above the seven-page maximum: 1) Resumes or short biographies of key project staff; 2) Attachments that demonstrate, highlight or illustrate your qualifications and accomplishments; and 3) References.

B. **Proposal Abstract (Attachment B)**

Provide summary of Proposal in format provided in Attachment B, limited to one page.

C. **Proposal Content – Statement of Qualifications**

The pages you submit for this section are included in the seven-page maximum you are allowed for your proposal. Include the following information in your **Statement of Qualifications**:

1. Demonstrated experience with Puget Sound recovery efforts including Local Integrating Organizations, including familiarity with the PWR-LIO.
2. Demonstrated experience in stakeholder facilitation
3. Describe your process to meet the deliverables and stay flexible enough to adjust to new information and new ideas while meeting the timeline and budget.
4. Highlight experience in creating communication tools and/or plans for watershed scale ecosystem recovery.
5. Identify key personnel that will perform important tasks for the project.
6. Identify roles and functions that you can best provide to the PRWC in this project and identify the responsibilities and roles best provided by the staff and members of the LIO and other project partners/stakeholders.
7. Provide the names and contact information for three to five references. Please note that references may be contacted prior to conducting interviews.

D. Proposal Content – Approach & Scope of Work

The pages you submit for this section are included in the seven-page maximum you are allowed for your proposal. Describe how you would approach and accomplish the **Anticipated Scope of Work** described in this Request for proposal – Attachment A. Please address the following areas:

1. **Project Plan:** Describe your approach in accomplishing the purposes of the project. Identify the intended results/deliverables you expect to achieve/accomplish. Response shall address, at minimum, each of the following items:
 - a. Provide a timeline and budget that describes how you anticipate managing all the priorities and activities listed in the Anticipated Scope of Work described in this Request for proposal between November 2, 2020 and September 30, 2021 that will maximize use of the stakeholder groups without creating burn-out.
2. **Challenges:** Describe any areas in the **Anticipated Scope of Work** or in your approach that you anticipate will be problematic or particularly difficult. Explain the source of the difficulties and your proposed solutions or approaches in meeting these challenges.
3. **Consideration:** Please describe the detailed budget you are proposing to the PRWC for the project deliverables and timeline.

VII. REVIEW AND SELECTION CRITERIA

A. Review of Written Responses

The proposals must meet the minimum technical requirements in Section VII to be further reviewed for program design elements. A ranking committee will evaluate proposals for program design based on responses to **Section VI.C: Statement of Qualifications** and **Section VI.D: Approach & Scope of Work**. Responses will be weighted as follows:

- Statement of Qualifications – 40%
- Project Plan to include timeline and budget – 35%
- Challenges – 15%
- Consideration – 10%

All proposers will be notified in writing of the acceptance or rejection of their proposals.

B. Interviews

Interviews may be conducted to clarify written responses.

C. Proposal Selection

Proposal selection shall be based upon the composite scores of the responses of qualifications according to the weighting for each response as listed in Section VII.A. Upon proposal selection, a contract containing terms will be negotiated with the successful respondent. If no contract is agreed upon within 30 days of proposal selection, the PRWC may award the contract to the next highest-ranking proposal or choose not to make an award. The PRWC reserves the right to reject any or all proposals.

VIII. CONTACTS FOR INFORMATION

All contacts for information regarding the project should be sent to:

Krystal Kyer
Pierce County SWM
2702 S. 42nd St. suite 201
Tacoma WA 98409

Due to COVID-19 and remote working requirements, email is preferred:
Krystal.kyer@piercecountywa.gov

IX. ATTACHMENTS

- A. LIO Capacity Funds Scope of Work**
- B. Proposal Abstracts**

ATTACHMENT A
LIO Capacity Funds Scope of Work

LIO Scope of Work FFY2021 –Puyallup White River LIO.

Total budget not to exceed \$125,000 (-10% for overhead to PRWC)

Task 1: Organize, Support, Administer, Facilitate, and Coordinate a Local Integrating Organization

The local integrating organization (LIO) is responsible for organizing and supporting a committee of representatives to discuss and make recommendations related to Action Agenda planning, local ecosystem recovery planning, and LIO Plan implementation interests. The Partnership will support the LIO through Ecosystem Recovery Team liaison participation at LIO meetings as the Partnership budget allows. The LIO shall maintain sufficient administration, facilitation, and coordination capacity to support the ongoing goals and objectives of a LIO.

Required for FFY 2020/2021 funding:

- Subtask 1.01 Maintain a local point of contact for the LIO.
- Subtask 1.02 Serve as an agent for local engagement and coordination in the LIO.
- Subtask 1.03 Arrange LIO meetings, prepare agendas, and facilitate meetings.
- Subtask 1.04 Develop and distribute summary notes and materials to LIO committees and the Partnership.
- Subtask 1.05 Update name, organizational affiliation, contact information, and committee(s) role of each LIO member in MiradiShare. Notify ER Team liaison, and update member roster when there is a change to participation.
- Subtask 1.06 Maintain publicly available information about the LIO, including notice of meetings, agendas, summary notes, and/or opportunities for content review. Maintain up to date LIO information on a public website: www.piercecountywa.gov/pwr-lio
- Subtask 1.07 Participate in regional meetings, including:

- Participate in quarterly (4) 4-6 hour in-person¹ LIO coordinator meetings. Possible dates for the LIO Coordinators in-person (or virtual) meetings are:
 - October 20, 2020 (Tuesday)
 - Partnership may adjust the following dates to better align with Ecosystem Coordination Board (ECB) dates. Meetings will fall on a Tuesday.*
 - February xx, 2021 (Tuesday)
 - May xx, 2021 (Tuesday)
 - August xx, 2021 (Tuesday)
- Participate in up to eight hours of additional conference calls or web-based meetings facilitated by the Partnership.

Subtask 1.08 Coordinate with the Puyallup and Chambers Salmon Recovery Lead Entity. As needed, adaptively manage LIO structure to better reflect integration.
“Direct relationship” is defined as: close coordination between lead entity(ies) and LIO staff (minimum of quarterly check-ins), structural integration or overlap of LIO and lead entity committees (technical, policy, decision-making, etc.), and integration or alignment of the priorities articulated with the local LIO Plans and salmon recovery plan(s).

Subtask 1.09 Prepare and participate on behalf of the LIO at a Partnership Board or Council meeting, if requested by the Boards Team staff at the Partnership².
[Rotating the Management Conference](#)- Leadership Council (LC)
 The LC meets four separate times each year, with two of these meetings being two-day meetings. The LC will take one of each two-day meeting to host a conversation with local leadership, including LIO and LE leadership and committee members, to address the intersection of local and regional recovery priorities. The PWR-LIO is tasked with coordinating hosting of one of these meeting in 2021, tentatively scheduled for June.

Subtask 1.10 Assist LIO in the process to nominate the LIO’s Ecosystem Coordination Board (ECB) representative and alternate ECB representative. Coordinate with Partnership ER Team liaison to communicate nomination to Partnership via letter or email. (Only if applicable.)

Subtask 1.11 Attend two Partnership workshops that support goals of overall LIO program. Topics may include building influential bodies, building local forums for accountability,

¹ Due to ever-evolving response to global health crisis, any and all in-person meetings may be rescheduled as virtual meetings.

² Due to ever-evolving response to global health crisis, any and all in-person meetings may be rescheduled as virtual meetings. For any LC or ECB meeting that is part of Rotating the Management Conference, these will be held in person only. If there is a need to reschedule these meetings, no LIO geography will be ‘skipped,’ but instead postponed until the LC and/or ECB can meet in person and in the LIO geography.

speaking with decision makers, expanding network of recovery and protection organizations, and building capacity. *Coordinators should plan for two single day events (ex. 9:30-2:30) in a centralized location of Puget Sound (ex. Edmonds).*³

Task 2: Advance Implementation of the 2018-2022 Action Agenda and Development of the 2022-2026 Action Agenda

LIOs serve an important role in coordinating the identification and implementation of local priorities identified in the Puget Sound Action Agenda. Work under this task is related to advancing Puget Sound recovery through local implementation of Regional Priorities and near-term actions (NTAs) that exist in the approved LIO Plan and the 2018 – 2022 Action Agenda. Work under this task is also related to contributing local knowledge, priorities, and needs to inform development of the 2022 Action Agenda.

Required for FFY 2020/2021 funding:

Subtask 2.01 Coordinate and catalyze implementation of the 2018-2022 Action Agenda through support of NTAs.

All the following activities required:

- Coordinate presentations/status updates from NTA owners on NTA progress to full LIO membership
- Share progress on NTAs relevant to the LIO using Puget Sound Info Action Agenda Tracker download (see deliverable for details).
- Offer support to local NTA owners by sharing funding opportunities with NTA owners and assist NTA owners in identification of funding opportunities, as requested and as time allows.
- Offer support to local NTA owners by coordinating requested LIO and Partnership letters of support for NTAs for non-NEP funding sources. If regional NTA owners request an LIO letter of support, discuss and determine LIOs support of the regional NTA (see next bullet)
- Offer local support to implementation of regional NTAs by: identifying via PS Info Action Agenda Tracker the funded regional NTAs of significance to LIO geography; determining which, if any, are of priority to LIO, and of those that are priority, initiate a dialogue between LIO and NTA owner, beginning with communicating a description of how and what NTA elements are of interest or need to the LIO.

Subtask 2.02 Coordinate and execute a process to identify and recommend NTA(s) for direct funding by the Strategic Initiative Leads (SIL), if applicable. Provide LIO Coordinator feedback on SIL shortlists, as requested.

³ Due to ever-evolving response to global health crisis, workshops may be held virtually.

- Subtask 2.03 Prior to each Ecosystem Coordination Board meeting, engage the LIO ECB representative regarding issues and preferences of the LIO. Encourage ECB representative engagement in Action Agenda discussions held at ECB meetings. Please review [ECB-LIO Expectations document](#) for details.
- Subtask 2.04 Engage with the Partnership and Strategic Initiative Lead baseline conversations around the development and execution of the 2022 Action Agenda. Coordinate local area content for 2022 Action Agenda inclusion.
- Provide feedback and input related to the vision for the 2022-2026 Action Agenda
 - Encourage LIO committee participation and/or participate as coordinator in LIO committee conversations with the Partnership and the SILs to identify local priorities, programs, and action for inclusion in the 2022-2026 Action Agenda.
 - Coordinate LIO comments and/or provide LIO coordinator comments on draft regional products related to 2022 Action Agenda development. These may include: draft LIO Plan synthesis products, draft Implementation Strategies, draft priorities, draft strategies, and draft outcomes.
 - Lead or assist in drafting of local area content for the 2022-2026 Action Agenda and review of draft content (intended for Summer/Fall 2021)
 - Working with stakeholders, develop initial local priorities based on the draft Ecosystem Recovery Plan to inform the Action Agenda.

Task 3: Performance Management

The LIO shall report on progress toward sub-tasks and deliverables through a quarterly progress report provided to the Partnership by the following dates: **January 15 (Fri); April 15 (Thurs); July 15 (Thur); Sept 30 (Thur)**. The LIO shall provide **monthly** invoices with brief explanations of activities two weeks after the end of each month (final invoice and progress report due on September 30, 2021). These reports (progress reports and invoices) will be used by the Partnership for the Financial Ecosystem Assessment Tracking system (FEATs), NEPORT, NEP Atlas, other reporting needs, and to show how LIOs are advancing their plan locally and regionally.

Required for FFY 2021 funding:

- Subtask 3.01 Send contract progress reports by Task (1-5) on a **quarterly** basis (**January 15 (Fri); April 15 (Thurs); July 15 (Thur); Sept 30 (Thur)**) to the Partnership using the Partnership-provided reporting formats (*i.e. progress report template*).
- Subtask 3.02 Send billing summary by Task (1-5) and proof of expenditure for grant activities on a **monthly** basis (on or before the 15th of each month) to the Partnership using the Partnership-provided reporting formats (*i.e. the "Paypack" document*).
- Subtask 3.03 Encourage local NTA owners to track implementation status on a 6-month basis and financial data (funding needed, secured, and expended) and progress measures on an

annual basis using PS Info. *Note: NTA owner is responsible for providing this information. If an NTA owner is not responsive, and if needed, assist Partnership in outreach to NTA owner.*

- Subtask 3.04 Develop and distribute LIO Plan progress report to the LIO committees and the Partnership 2x a year. For PWR-LIO, the ERP is still under development and data in Miradi is not fully established, so this will be a short report on the status of the plan development in 2021.
- Purpose: The LIO Plan progress report via the one click Miradi export and the PS Info Action Agenda Tracker download is intended to keep LIO committees accountable to the LIO Plan, aware of areas in the Plan that are in need of updates, and in dialogue of what barriers exist, persist, and how the LIO can support the work of LIO committee members and the organizations and/or jurisdictions that they represent. LIO coordinators may choose to make the progress of their LIO Plan an agenda item at one or more meetings.*

Task 4: Support Completion and Adaptive Management of LIO Ecosystem Recovery Plan

The LIO shall manage revisions and communicate LIO Plan content in coordination with local and regional partners. Adaptively managing and strategically communicating the LIO Plan engenders confidence in local and regional decision makers that there are well defined problems in Puget Sound at the LIO scale; that LIOs know what to do to address them; the LIO knows which partners to engage and for what purpose; and that LIO work is well integrated into an overall strategy for Puget Sound Recovery. The Plan serves as a longer term strategic framework from which the Partnership and other partners can produce a variety of products associated with planning and communicating Puget Sound recovery goals, strategies, outcomes, barriers and solutions. Examples of these products include Implementation Strategies and a variety of LIO Plan synthesis products.

Required for FFY 2021 funding:

- Subtask 4.01 Complete and adaptively manage ERP.
- Complete the ERP using Miradi in response to conversations and workshops held as part of 2022 Action Agenda Development (See subtask 2.04).
 - Work with relevant committees or boards for approval of ERP.
 - In response to needs and requests of LIO committees, update and/or further develop ERP, or create a plan to do so in future FFY years. This should work in coordination with subtask 3.04. (ex. consider and integrate climate impacts and climate adaptation and resilience-focused strategies)
 - Keep ERP Miradi files up to date (e.g., goals, objectives, results chains).
 - Incorporate content (ex. adopted by reference) from adaptively managed or updated salmon recovery chapters into ERP.
- Subtask 4.02 Review materials and provide feedback and/or input on needed materials for [Puget Sound Info platform](#).
- PS Info will have both a local area page and a LIO organization page. The Partnership will work closely with LIO coordinator to ensure that these pages

are accurate and up to date.

Task 5: Tailor LIO coordination to Support Unique Vision and Goals of LIO

The Partnership is eager to invest and empower LIOs for the continued development and implementation of the Action Agenda and LIO Plans (ERPs). Ultimately, ecosystem recovery goes beyond near-term actions and is addressed in ongoing programs and other avenues of local and regional influence in decision making. Sustainable ecosystem recovery and protection requires a socio-political and cultural shift that incorporates the value of ecosystem services. LIOs are powerful networks that recognize the local nuance of these elements and are the heart of driving the changes necessary to pursue them. This subtask enables LIOs to pursue the individual goals and vision that are unique to their LIO.

This section includes tasks that fulfill the following principles:

- Supports an individual LIO’s vision and effort for meaningful engagement in Puget Sound Recovery system including the Action Agenda.
- Supports greater coordination and efficiency and does not simply increase process
- Supports the integration of salmon recovery priorities
- Aligns with Action Agenda and the implementation strategies

The two subtasks selected by the PWR-LIO for this contract are 5.02 and 5.04, described below:

Subtask 5.02 **Inform and Educate local decision makers on work of the LIO⁴**

Work with LIO committee members to determine opportunities to inform and educate local decision makers (after the 2020 General Election and installment of new elected officials into office) on the work of the LIO, including the ERP and associated gaps and barriers.

- Work with ER Team liaison to define attendance role for LIO coordinators or committee member(s) attendance at local and regional decision-maker workgroups and forums in order to communicate LIO gaps, barriers, and LIO initiatives.

Subtask 5.04 **Support Existing Local Outreach Network**

This task is intended to establish the new PWR-LIO’s role as the local ecosystem recovery outreach network, and to advance and catalyze implementation of ERP priority public engagement, awareness raising, incentive, and/or compliance projects and programs within the LIO (including NTAs). To achieve this goal, we have identified several necessary tasks.

- Fund capacity for LIO coordinator (or subcontract funds to a separate ECO Net coordinator or equivalent, approximately \$6,000, not to exceed \$10,000) to:
 - (1) Lead the LIO in the development of a communications strategy.

⁴ Any work under this subtask must strictly adhere to policy outlined in [Lobbying CFR 200.450](#).

- (2) Develop a collaborative partnership with the existing local outreach network (PWI) to incorporate and support local LE and LIO Plans in their outreach efforts.
 - (3) Participate in meetings of the Communities of Interest of the Puyallup Watershed Initiative to inform them of the ERP, learn about their priorities and explore opportunities for collaboration.
 - (4) Provide civic engagement workshops for watershed residents so they can learn how to engage more effectively in watershed issues.
- Fund an annual local LIO partner symposium (not to exceed \$10,000), with the purpose of gathering all partners in the LIO area (including local outreach network partners, LEs, LIO partners) who are implementing behavior change projects or programs to share successes, discuss challenges or barriers, and to provide networking and collaboration opportunities.

PWR-LIO Scope of Work

Schedule of Deliverables: Summary of LIO Coordination Grant Scope of Work Deliverables and Budget for October 2020 – September 2021, not to exceed \$125,000 (-10% for overhead to PRWC)

Deliverables	Reporting Period FFY 2020 Funding			
	Oct – Dec 2020	Jan – Mar 2021	Apr – Jun 2021	Jul – Sep 2021
Task 1: Organize, Support, Administer, Facilitate, and Coordinate a Local Integrating Organization				
Subtask 1.03 Submit LIO committee meeting materials including agendas and other meeting materials (via Box contract folder).	X	X	X	X
Subtask 1.04 Develop and distribute summary meeting notes and materials to committees and the Partnership (via Box contract folder or links to LIO website).	X	X	X	X
Subtask 1.05 Updated Miradi file that has updated name and organizational affiliation of each LIO member. Notify ERC of change or list in quarterly progress reports.	X	X	X	X
Subtask 1.06 Provide link to LIO publicly available website to the Partnership and describe updates to the website in quarterly progress reports.	X	X	X	X
Subtask 1.07 Attendance at meeting as reflected on the attendance sheets and summaries written by Partnership staff	X	X	X	X

<p>Subtask 1.08</p> <p>Describe current state of coordination with salmon recovery lead entity in first quarterly progress report. As relevant, describe and provide any materials related to LIO and LE efforts toward closer coordination in subsequent progress reports.</p>	X	As applicable	As applicable	As applicable
<p>Subtask 1.09</p> <ul style="list-style-type: none"> • Coordinate with PSP to plan and host the June 2021 Leadership Council meeting and tour in the Puyallup watershed following LC protocol • Provide Partnership draft and final agenda topics and descriptions following the Rotating the Management Conference Protocol (via Box contract folder) • Provide copies of relevant memos and/or summary notes as part of participation in Board or Council meeting (via Box contract folder) 		X	X	
<p>Subtask 1.10</p> <p>Communicate ECB nomination to Partnership via letter or email, and upload copy of such email or letter in Box contract folder</p>	As applicable			
<p>Subtask 1.11</p> <p>Attendance at workshops as reflected on the attendance sheets and summaries written by Partnership staff</p>	X		X	
Task 2: Advance Implementation of the 2018-2022 Action Agenda and Development of the 2022-2026 Action				
<p>Subtask 2.01</p> <p>Upload all deliverables to Box contract folder with quarterly progress reports:</p> <p>Provide description in quarterly progress report:</p> <ul style="list-style-type: none"> • A list of funding opportunities shared with LIO members • Describe if any regional NTA of significance to the LIO was funded (using PS Info) and if so, state which one(s), and what was done to initiate dialogue along with any lessons, challenges or successes from this coordination. <p>Upload copies to Box contract folder:</p> <ul style="list-style-type: none"> • File download of LIO NTA status report from PS Info (2x year). This will be a single click download from the local LIO organization PS Info page. 	X	X	X	X
<p>Subtask 2.02</p> <ul style="list-style-type: none"> • Notify the Partnership of the NTA recommended for direct funding (via direct email or cc'd along with email to SILs) • Notify the Partnership of the LIO feedback on shortlist to SILs (via direct email or cc'd along with email to SILs) 	As applicable			

<p>Subtask 2.03 In quarterly progress report, briefly describe discussion with Action Area rep and any challenges or successes associated with this coordination.</p>	X	X	X	X
<p>Subtask 2.04</p> <ul style="list-style-type: none"> • Upload to Box contract folder final LIO materials associated with Action Agenda Development • Attendance at workshops as reflected on the attendance sheets and summaries written by Partnership staff • In quarterly progress reports, describe tasks and actions associated with subtask • Conduct stakeholder outreach across each Focus Area of the Ecosystem Recovery Plan to determine the priorities of the LIO to inform the 2022 – 2026 Action Agenda. 	As applicable			
Task 3: Performance Management				
<p>Subtask 3.01</p> <ul style="list-style-type: none"> • Send progress reports by task and associated deliverables on a quarterly basis (January 15, 2021; April 15, 2021; July 15, 2021; and September 30, 2021) to the Partnership using the Partnership-provided reporting formats (<i>i.e. progress report template</i>). 	X	X	X	X
<p>Subtask 3.02</p> <ul style="list-style-type: none"> • Send billing summary by task, and proof of expenditure for grant activities monthly to the Partnership using the Partnership – provided reporting formats (<i>i.e. the “Paypack” document</i>) (<i>Final billing invoice due October 2020</i>) 	X	X	X	X
<p>Subtask 3.04</p> <ul style="list-style-type: none"> • Upload LIO Plan progress report to Box contract folder, distribute the progress report to committee/board via email or during meetings with the proposed discussion questions for future LIO meetings (see ‘purpose’ description under subtask 3.04). • The progress report for the LIO Plan should consist of two documents- LIO may choose to provide more materials as appropriate: <ol style="list-style-type: none"> 1) PS Info NTA status report that will be a fast and easy download. Partnership to provide instructions on how to create this download, and 2) MiradiShare LIO Plan single click export. Partnership to provide instructions on how to create this export 		X		X
Task 4: Support Adaptive Management of LIO Ecosystem Recovery Plans - \$22,275.00				

<p>Subtask 4.01</p> <ul style="list-style-type: none"> • Provide description of priority adaptive management activities for 2020-2021 and beyond in quarterly progress report • Conduct stakeholder outreach across each Focus Area of the Ecosystem Recovery Plan to solicit feedback on the draft chapters. • Finalize, publish, and submit the written Ecosystem Recovery Plan to the Partnership and project file in Miradi (i.e. briefly note if changes were made in Miradi in quarterly progress report). 	X	X	X	X
<p>Subtask 4.02</p> <ul style="list-style-type: none"> • In quarterly progress report, briefly describe is any PS Info materials were reviewed 	X	X	X	X
<p>Task 5: Tailor LIO coordination to Support Unique Vision and Goals of LIO</p>				
<p>Subtask 5.02: Inform and Educate local decision makers on work of the LIO</p> <p>In quarterly progress reports, describe efforts to educate and inform local decision makers. Identify local decision makers engaged and how information was communicated.</p> <ul style="list-style-type: none"> • Update local elected decision makers identified in Stakeholder Outreach Plan after election(s) • Inform all local decision makers of LIO quarterly meetings, webpage, and contact information • Provide copy of Ecosystem Recovery Plan and offer to present to ten targeted decision makers including local jurisdictions not actively participating <p>Create PowerPoint presentation for educating new decision-makers, and publish online</p>	X	X	X	X
<p>Subtask 5.04: Activate Local Outreach Network i.e. the LIO</p> <p>Upload any subcontract associated with this subtask. In quarterly progress reports, provide status of the subcontract to ensure full spend down by Sept. 30, 2021.</p> <ul style="list-style-type: none"> • In quarterly progress report, provide description of how local outreach network is aligning with LIO Plan • Provide civic engagement workshops for watershed residents • Participate in meetings with each of the six Communities of Interest of the Puyallup Watershed Initiative to inform them of the ERP, learn about their priorities and explore opportunities for collaboration to support local ecosystem recovery • Co-host watershed symposium event with greater outreach and emphasis on collaboration as part of launching ERP. 	X	X	X	X

<ul style="list-style-type: none"> • Develop communications strategy using existing Stakeholder Outreach Plan • Upload final materials to Contract Box folder related to symposium 				
<ul style="list-style-type: none"> • Total Budget 				
	\$ 125,000.00			

ATTACHMENT B

Puyallup-White River Local Integrating Organization: LIO Coordination

PROPOSAL ABSTRACT TEMPLATE

Responding Individual or

Organization:

Contact Person:

Title:

Address:

Telephone:

Email:

Fax:

Summary of Statement of Qualifications:

Summary of Approach and Scope of Work: