

# EVALUATION FRASER SALMON AND WATERSHEDS PROGRAM

**REQUEST FOR PROPOSAL (RFP)** 

ISSUE DATE JANUARY 15, 2010

CLOSING DATE FEBRUARY 1, 2010 4:00 P.M.

# **REQUEST FOR PROPOSAL (RFP)**

The Fraser Salmon and Watersheds Program Invites Proposals to Undertake The

# <u>Evaluation</u> <u>Fraser Salmon and Watersheds Program</u>

# **KEY INFORMATION**

- 1. Closing Date for Response: February 1, 2010 at 4:00 p.m. local time.
- 2. Send **two printed** and one **emailed copy of complete proposal package.** Interested contractors are advised to return the enclosed RFP Acknowledgement (Appendix A) immediately to ensure that they receive any further information regarding this RFP that may be required.
- 3. Contact Person for all inquiries:

Cameron West Director, Fraser Salmon and Watersheds Program Pacific Salmon Foundation Suite 300 - 1682 West 7<sup>th</sup> Avenue Vancouver BC, V6J 4S6 Telephone (604) 664-7664 (est. 117) Facsimile (604) 664-7665 <u>cwest@psf.ca</u>

Information offered from sources other than the above is not official and may be inaccurate.

- 4. Address for proposal submission: Pacific Salmon Foundation Suite 300 – 1682 West 7<sup>th</sup> Avenue Vancouver, BC, V6J 4S6 Telephone No.: (604) 664-7664 Facsimile No.: (604) 664-7665
- 5. Contractors are advised to read and respond appropriately to ALL sections of this RFP; an incomplete proposal may be rejected.
- 6. Please use the above RFP description on all related correspondence.

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#### **OBJECTIVE**

The objective of this evaluation is to assess the effectiveness and cost effectiveness of the Fraser Salmon and Watersheds Program.

The evaluation will develop performance measures and methodology to assess the program, and provide recommendations to ensure the best use of funds to ensure maximum results and long-term benefits to salmon and watersheds in the Fraser Basin.

# BACKGROUND

# Origin and description of the Fraser Salmon and Watersheds Program

In July 2005, the Living Rivers Trust Fund Advisory Group invited the Pacific Salmon Foundation (PSF) and the Fraser Basin Council (FBC) to lead development of a business plan to address salmon and watershed sustainability issues in the Fraser Basin. The resulting plan, *Living Rivers Business Plan for Salmonids and Watersheds in the Fraser Basin (Business Plan)*<sup>1</sup> identified several key considerations and strategic priorities, thereby providing the foundation for the Fraser Salmon and Watersheds Program (FSWP or the Program). Upon approval of the *Business Plan*, the Program received its founding funds from the provincial Living Rivers Trust Fund<sup>2</sup>.

In February 2007, Fisheries and Oceans Canada announced the Fraser Basin Initiative (FBI) that also contributes funding to the Program in the form of cash and in-kind resources over a five-year period. At that point, the plan became known as the *Fraser Salmon and Watersheds Program Business Plan for Salmonids in the Watershed*.<sup>3</sup>.

FSWP's major funding consists of over \$10M in Living Rivers funding from the Province of British Columbia and \$5M in cash plus \$5M of in-kind support from DFO through its Fraser Basin Initiative. Since 2006, FSWP has funded 206 proponent-led projects and 31 FSWP staff-led projects with a total value of over \$10 million.

FSWP is jointly managed by the Pacific Salmon Foundation and the Fraser Basin Council, and administered by PSF. The Program operates on an annual cycle. Input on priorities and direction is received from stakeholder participants in the annual Fraser Assembly, which informs the annual request for proposals. The project selection process includes review of proposals for alignment with FSWP strategic outcomes, a decision framework with advice from independent Technical Review Committees, government agencies and First Nation organizations, and consideration of past performance and lessons learned from previous projects. The annual cycle allows the Program to communicate with many individuals and organizations, receive feedback from stakeholders throughout the Basin, and to adapt its strategic focus.

<sup>&</sup>lt;sup>1</sup> To view the Business Plan document, visit <u>http://www.fraserbasin.bc.ca/programs/documents/lrbp.pdf</u>

<sup>&</sup>lt;sup>2</sup> Visit <u>www.livingrivers.ca</u> for more information on the Living Rivers Trust Fund

<sup>&</sup>lt;sup>3</sup> View <u>www.fswp.ca</u> and <u>www.thinksalmon.com</u> to learn about the *Fraser Salmon and Watersheds Program* 

# Strategic Context of the Fraser Salmon and Watersheds Program

The original *Business Plan* articulated a Vision Statement: *To shape human behaviour for the benefit of salmonids and the watersheds they depend on*. Since the addition of the Fraser Basin Initiative the FSWP Vision and Mission statements are:

Vision:

Healthy salmon populations in functioning watersheds co-existing with thriving communities in the Fraser Basin.

Mission:

To inspire changes in human behaviour for the benefit of salmonids and the watersheds they depend on.

The goals of the original Living Rivers Business Plan were to:

- 1. Foster effective communications and governance approaches;
- 2. Protect and restore habitat and water; and,
- 3. Support responsive and effective fisheries management.

Seven key strategies were identified in the original Business Plan to achieve these goals:

- 1. Community Engagement
- 2. Governance and Integrated Planning
- 3. Engage First Nations
- 4. Integrate Water Use with Watershed and Fish Sustainability Planning
- 5. Protect and Restore Habitat
- 6. Sustainable Fisheries
- 7. Improved Fisheries Information

The goals of the subsequent Fraser Basin Initiative were similar:

- 1. Improved Science for Decision Making;
- 2. Stewardship and Habitat;
- 3. Enhanced Fisheries Management Elements; and,
- 4. Collaboration and Relationship Building

To address the above goals and strategies, the Fraser Salmon and Watersheds Program is organized into four Program Areas, reflecting the integration between themes that have emerged through the development of the Program and strategies (Table 1). Engaging First Nations is considered to be a critical component of all four Program Areas, and is therefore not listed as a separate program area.

Program Areas	2006 Strategies From Original Business Plan
Education and Engagement	Community Engagement
	Engage First Nations
	<ul> <li>Governance and Integrated Planning</li> </ul>
Integrated Planning and	<ul> <li>Integrate Water Use with Watershed and Fish</li> </ul>
Governance	Sustainability Planning
	<ul> <li>Engage First Nations</li> </ul>
Habitat & Water Restoration	<ul> <li>Protect and Restore Habitat</li> </ul>
and Stewardship	<ul> <li>Engage First Nations</li> </ul>
Sustainable Integrated Figherica	Sustainable Fisheries
Sustainable Integrated Fisheries	<ul> <li>Improved Fisheries Information</li> </ul>
Management	Engage First Nations

Table 1: Fraser Salmon and Watersheds Program Areas and aligning Strategies

# **DRAFT FSWP EVALUATION FRAMEWORK**

In October 2005, collaborative workshops indentified key strategies, and 'early wins' and activities associated with each strategy, the highest priority strategies becoming those identified in table 1. This synthesis of attendees' visions and aspirations for the future sustainability of Fraser salmon and watersheds was intended to guide selection and implementation of projects.

In May 2007, drafting began on an evaluation framework based on the seven strategies of the *Business Plan*. Although not completed, the framework was intended to be an iterative document that would evolve and guide project selection and performance measurement as managers and partners continued to build their understanding of the Program, the context, and the challenges addressed (Attachment 1).

Through 2008, FSWP participated in a multi-agency initiative to develop a draft overarching logic model, under which each Party was to develop its own strategic outcomes. Over 2009, FSWP developed Desired Outcome statements and supporting strategies for each of the four Program Areas to assist work planning and the annual project selection process (Attachment 2).

# Tasks

The suggested approach to the Evaluation to measure the effectiveness and cost effectiveness of activities of the Fraser Salmon and Watersheds Program is as follows:

- 1. Review the *Business Plan*, draft Evaluation, Strategic Outcome, project selection and any other necessary documents, and provide recommendations on the evaluation framework including performance measures and evaluation scoring criteria to be used for the evaluation.
- 2. Ensure the performance measures are effective and valid.
- 3. Recommend the information gathering process to be used, likely including interviews of proponents, agency and FSWP staff as well as review of project and FSWP records and program reports.
- 4. Identify a cross-section of projects over all four program areas. A minimum of 20% of projects are to be evaluated.
- 5. Report on the results of the evaluation, including any recommendations for improvements for the project selection process and performance measurement.

# Reporting

At the minimum, the contractor will be expected to complete the following:

- a. Meet with the FSWP Evaluation Committee to finalize methodology
- b. Review relevant documents
- c. Refine Evaluation Framework
- d. Conduct interviews of relevant parties, agencies and other groups with recognized and long-standing interest or involvement with the FSWP
- e. Prepare a draft report for review by the FSWP Evaluation Committee
- f. Meet with the FSWP Evaluation Committee to review draft report comments
- g. Prepare final report that will include: six bound copies, (1) digital version in Microsoft Word 2000/XP format, and (1) web ready electronic version (PDF file).

The final report would be generally organized and contain a minimum of:

- Executive Summary
- Introduction
- Methods of evaluation
- Results
- Discussion and Recommendations

# **PROPOSAL SUBMISSION GUIDELINES**

#### **Process and Format**

One electronic/emailed and one complete printed copy must be received at the location not later than the date and time specified: **FEBRUARY 1, 2010, 4:00 P.M**.

Emailed copy to:

Cameron West, Director Fraser Salmon and Watersheds Program Telephone: 604 664 -7664 Email: cwest@psf.ca

Printed copy to: Pacific Salmon Foundation 300 1682 West 7th Avenue Vancouver, BC, V6J 4S6

Proposals must be clearly marked with the name and address of the contractor and the words "RFP for the Evaluation of the Fraser Salmon and Watersheds Program.' All envelopes should be sealed and marked "Confidential". Proposals will not be received by facsimile machine.

Late proposals will be returned unopened, courier collect, to the contractor.

Note: Proposals should not exceed 20 pages including references and appendices.

**Note**: If the contractor determines it is advisable to complete additional work or to delete work specified, the rationale for the changes should be noted and cost for these additions or deletions must be separately identified

**Note**: Nothing in this RFP is intended to relieve the contractors from forming their own opinions and conclusions in respect of this RFP.

**Note:** Information obtained by the contractor as a result of participation in this project is confidential and must not be disclosed without written authorization from PSF

**Note**: The contractor should not have applied for or received funding for projects under the Fraser Salmon and Watersheds Program

**Note**: The contractor should demonstrate substantial experience in the evaluation of aquatic environmental stewardship programs.

#### **Deliverables and Dates**

Proposal submission deadline	February 1, 2010
Announcement of successful contractor	February 15, 2010
Initial Meeting with FSWP Staff	February 19, 2010
Finalized Evaluation Framework	March 12, 2010
Data Collection and Interviews	Mar/Apr/May 2010
Draft Report	May 14, 2010
Refinement of Draft	May/June, 2010
Final Report	June 11, 2010

# **Proposal Evaluation**

Proposals will be evaluated in accordance with the following evaluation criteria: Criterion Weight percentage

Demonstrated understanding of project requirements	20
Project design, work plan and feasibility	30
Qualifications/Related experience	25
Price	25

# Pricing

Novel approaches or methods resulting in better value are welcomed.

# Note: THE LOWEST BID MAY NOT NECESSARILY BE AWARDED

# MANDATORY REQUIREMENTS

# **RFP** Acknowledgement

Fill out the attached RFP ACKNOWLEDGEMENT (Attachment 3) and return it to the contact listed in the Proposal Submission Guidelines Process and Format section. Any subsequent information will be directed only to those who acknowledge receipt of the RFP with indication that they intend to submit a proposal.

# **Key Personnel**

Contractors shall identify the management staff and key personnel to be responsible for implementation of the anticipated contract. The project manager selected for the project must have the appropriate level of both education and experience in developing and implementing evaluation frameworks, possess excellent personal and communications skills, and a have general knowledge of the salmon biology and management issues.

# Organization

All contractors must be registered companies in British Columbia.

#### Insurance

All contractors must provide proof of a minimum of \$1,000,000 in liability insurance, and be currently covered by Workers Compensation Board insurance.

#### Changes

Contractors may request changes to the RFP requirement as described herein by providing an indication of the reason, and if applicable, the impact on the unit and/or total proposal price.

# **Financing Of Proposals**

The cost associated with preparing and submitting proposals will not be paid by PSF.

#### **Performance Security**

Contract payments are subject to a holdback of 10 percent of the value of the work performed under the terms of the Agreement. PSF is authorized to apply the holdback funds as follows:

- a. firstly, to the contractor's unpaid workers, direct subcontractors and material suppliers;
- b. secondly, as a performance security for the correction of any nonperformance of a provision of this Agreement.

# **Disclaimers/Limitations of Liability**

Neither acceptance of a proposal nor execution of an Agreement shall constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law. It is the responsibility of the contractor to obtain such prior to commencement of the services under the proposed contract.

PSF reserves the right to modify the conditions of the RFP, at any time up to the closing date and time.

THE FOUNDATION, ITS SERVANTS, AGENTS AND CONSULTANTS EXPRESSLY DISCLAIM ANY AND ALL LIABILITY FOR REPRESENTATIONS, WARRANTIES EXPRESSED OR IMPLIED OR CONTAINED IN, OR FOR OMISSIONS FROM THIS RFP PACKAGE OR ANY TIME TO A CONTRACTOR BY OR ON BEHALF OF THE SOCIETY. NOTHING IN THIS RFP IS INTENDED TO RELIEVE A CONTRACTOR FROM FORMING THEIR OWN OPINIONS AND CONCLUSIONS IN RESPECT OF THIS RFP.

# **Security of Information**

The successful contractor must agree to maintain security standards consistent with security policies of the Government of British Columbia. These include strict control of access to data and maintaining confidentiality of information gained while carrying out their duties under the terms of any contract.

# SUBMISSION FORMAT

The following is provided as a guideline for submissions:

TITLE PAGE	Including: RFP title; contractor name, address, telephone number, fax number, and contact person
LETTER OF INTRODUCTION	One page, introducing the contractor's company signed by the person(s) authorized to bind the contractor to their proposed offer
TABLE OF CONTENTS	Should include a list of all sections and appendices in the proposal response and indicate corresponding page numbers
CONTRACTOR PROFILE	One page overview of the contractor's available services and relevant experience in developing and implementing evaluation frameworks and any salmonid management or biology expertise

PROPOSAL	<ul> <li>Full details of the contractor's proposal, including:</li> <li>general approach;</li> <li>methods and procedures to be applied, both the main ones recommended and any options that could augment them;</li> <li>any examples to illustrate the recommended approach;</li> <li>project management information, including work plan and schedule;</li> <li>any additional explanation for how RFP Project results/ specifications will be achieved;</li> </ul>
RESPONSIBILITIE	S Indicate the proposed roles and responsibilities of the parties including what each will provide to the contemplated agreement
PRICING	Indicate the proposal pricing as requested in section above
APPENDICES	Attach other information as required by the RFP, such as: References; resumes; financial information; and, other relevant useful information
CERTIFICATION	Proposals shall include the following signed certification:

"The statements made in this proposal are correct and truthful representations. If selected, I/we will negotiate in good faith with the Pacific Salmon Foundation. This proposal will be irrevocable for 40 days from the date of closing."

Contractor (please type):
Signature:
Title:
Date:

# Attachment 1: DRAFT Fraser Salmon and Watersheds Program Management and Evaluation Framework – May 17, 2007

Strategy	2011 Outcomes	Success Measures
Encourage people to "Think Salmon" in order to raise level of public interest, knowledge and engagement	Increased public and target audience awareness of issues related to salmon and watershed integrity	<ul> <li>Change in awareness of salmon stock and habitat status, salmon issues</li> <li>Number of publications and outreach products and/or sessions</li> <li>Number of Think Salmon website hits</li> <li>Geographic and sectoral diversity in messaging</li> </ul>
	Increased target audience action on key issues related to water quality and quantity affecting salmon, with particular emphasis on urban, agricultural and industrial impacts	<ul> <li>Surveys indicate sustained change in practices within target audiences (e.g. land management practices, use of BMPs, etc.)</li> </ul>
Establish a strategic, well-informed, effective and efficient water and watershed governance approach (at the regional or sub-basin scale)	Evidence of effective multi- party planning process(es) at the regional or sub-basin scale	<ul> <li>Existence of active multi-party planning groups on a pilot basis in high priority areas.</li> <li>Number of community and First Nations involved in defining and implementing goals and actions.</li> <li>Leveraging by planning groups to address issues.</li> </ul>
	Increased integration of federal-provincial program delivery and/or planning to reduce duplication of effort	<ul> <li>Successful design and implementation of pilot governance model</li> </ul>
	Increased multi-partner (including private sector) information and data management and sharing	<ul> <li>Integrated information base to support improved decision making on habitat and aquatic ecosystems</li> </ul>
Support collaborative management relationships among First Nations and with other governments and interests	Aboriginal involvement in all major aspects of the FSWP	<ul> <li>Development of engagement guidelines.</li> <li>Aboriginal involvement in management structure and committees for Program.</li> <li>Aboriginal people engaged in all 6 strategies.</li> </ul>
	Increased dialogue and understanding among First Nations and non-First Nations on shared watershed and salmon management issues	<ul> <li>Communications on the historical and current role of First Nations in the management of salmon and watersheds</li> </ul>
Strategy	2011 Outcomes	Success Measures

Conserve and rehabilitate salmon populations and their habitats	Rehabilitation of high priority salmon habitat	Improved habitat quality as a result of restoration activities within a watershed
	Conservation of high priority salmon habitat	Development of tools that promoted the conservation of habitat
	Integrated information base on habitat status and trends, especially in regard to climate change	Establishment of a comprehensive habitat monitoring program, with accessible information, on a pilot basis
Integrate water use considerations with salmon recovery (at the regional or sub- basin scale)	Improved information on aquifer and ground water use and management	<ul> <li>Identification of minimum conservation flows for fish within at least 10 priority sub-basins</li> <li>Assessment of minimum fish flows within context of total flows and extractions</li> <li>Development of water storage options in priority watersheds</li> </ul>
		<ul> <li>Development of watershed recovery plans in areas with diverse and growing water users and demand</li> </ul>
	Incorporation of conservation flows into watershed planning	Number of watershed plans that incorporate surface and groundwater considerations for fish
Improve the information base for fisheries management	Fisheries that have reduced impacts on non-target stocks and species while providing viable opportunities for each fishing sector	<ul> <li>Design and use of new stock and harvest assessment processes for in-river fisheries</li> </ul>
	Greater collaboration, coordination, communication and data exchange among fishing sectors and managers	Integrated and accessible data management system with built in analytical and reporting tools
	New and improved tools and assessment approaches for in-season management that increase confidence in information available	Multi-species approach for stock assessment, information exchange and in-river fisheries management
Incorporate social, economic and ecological values and objectives in decision-making	Better understanding of diverse values and objectives among fishing sectors, and how these objectives are incorporated into fisheries management	Improved/more rigorous/accurate socio-economic information, especially in regard to First Nations fisheries

# Attachment 2: Fraser Salmon and Watersheds Program - Desired Outcomes and Supporting Strategies - 2009

Progr	am Area: Education and Engagement
	Desired Outcomes
	1.1 People and communities take a leadership role in raising the profile of salmon and watershed sustainability.
	1.2 People and communities have an awareness of their connection to
	ecosystems.
	1.3 People and communities share information, knowledge and opportunities related to watershed sustainability.
	1.4 People and communities have the capacity to take action towards watershed sustainability.
	Supporting Strategies <i>i.</i> " <b>Do it</b> ": promotes specific behaviour change.
	<i>ii.</i> " <b>Do it, learn more, do more</b> ": promotes action to spark awareness, leading to more action (escalating engagement within an audience).
Progr	am Area: Habitat and Water Restoration & Stewardship
	Desired Outcomes
	2.1 Habitat integrity works and ecosystem management are efficient and
	effective through coordinated, integrated and informed processes.
	2.2 Habitat integrity works and ecosystem management contributes to resilient
	and resistant ecosystems.
	2.3 Diverse and representative sectors and levels of society are engaged in
	habitat integrity works and ecosystem management, contributing to
	participatory and integrated ecosystem management processes.
	Supporting Strategies
	<i>i)</i> Habitat: To improve the integrity and resiliency of salmon habitat
	and ecosystem resiliency through protection, restoration, mitigation
	and enhancement activities.
	ii) Stewardship: To support and escalate the engagement of
	representative groups in habitat and ecosystem management
	initiatives through stewardship activities, capacity building,
	education, and awareness.
	<i>iii)</i> Research and Tools: To support the development and dissemination of knowledge and tools required for improved desigion making and
	of knowledge and tools required for improved decision-making and best management practices.

Progra	am Area: Planning and Governance
	<ul> <li>Desired Outcomes</li> <li>3.1 People convene in collaborative processes and develop common visions of sustainable governance in both salmon and watershed management. These processes occur among and/or between First Nations, different levels of government, and other interested parties.</li> <li>3.2 Planning and governance tools and techniques are used to support regionally specific and/or province-wide collaborative decision-making processes.</li> </ul>
	<ul> <li>Supporting Strategies <ol> <li>Planning groups involve a wide range of interested parties who work collaboratively to define the issue being addressed, a common vision, and formulate an action-oriented plan towards a sustainable solution.</li> <li>Planning groups clearly identify the information they have and work to obtain the information they need to address the issue at hand.</li> </ol> </li> </ul>
Progra	am Area: Sustainable Integrated Fisheries Management
	<ul> <li>Desired Outcomes</li> <li>4.1 Diverse and representative sectors and levels of society are engaged in collaborative science initiatives addressing threats to salmon and watershed sustainability.</li> <li>4.2 Tools and information necessary to support a common understanding of science that addresses threats to salmon and watershed sustainability exist.</li> </ul>
	<ul> <li>Supporting Strategies <ol> <li>Developing collaborative science initiatives, inclusive of all interests, that address threats to salmon and watershed sustainability.</li> <li>Creation and dissemination of tools and information necessary to support a common understanding of science needed to address threats to salmon and watershed sustainability.</li> </ol></li></ul>
Progra	am Wide
	Desired Outcome         5.1       First Nations are engaged in all areas and stages of FSWP projects. See         Aboriginal       Engagement       Guidelines       at         http://www.thinksalmon.com/fswp       notice/item/guidelines       for       first       natio         ns       engagement       reposted/

#### Attachment 3 **RFP ACKNOWLEDGEMENT**

**Request for Proposal** 

# **Evaluation Fraser Salmon and Watersheds Program**

Please complete this form and return it IMMEDIATELY to:

Pacific Salmon Foundation Suite 300 – 1682 West 7<sup>th</sup> Avenue Vancouver, BC V6J 4S6

Telephone No.: (604) 664-7664 (ext. 117) Facsimile No.: (604) 664-7665 E-mail: cwest@psf.ca

Failure to return this form will result in no further communication regarding this RFP if required.

	COMPANY NAME:
	ADDRESS:
	CONTACT PERSON:
	TITLE:
	PHONE NUMBER:
	FACSIMILE NUMBER:
	EMAIL:
I/We h below)	have received a copy of the above noted RFP and: (check appropriate response in A and B
A.	<ul> <li>( ) I/We <u>will</u> be submitting a proposal.</li> <li>( ) I/We will not be submitting a proposal.</li> </ul>

I authorize PSF to send further correspondence relevant to this RFP that is deemed Β. to be of an urgent nature by the following method:

Courier collect	Mail		Email	
DATE:				
SIGNATURE:		TITLE:		