

**Massachusetts Ocean Partnership**

**Request for Qualifications**

**To**

**Support Development of  
Planning Framework Options**

**For**

**Integrated Multi-use Ocean Management in Massachusetts**

**June 13, 2008**

## **Introduction**

The Massachusetts Ocean Partnership (“MOP”) is seeking a qualified consultant or team of consultants (the “Consultant”) to assist in development of conceptual and operational planning framework options to guide integrated ocean management for the Commonwealth’s coastal ocean waters. Planning options will be developed in close collaboration with the Executive Office of Energy and Environmental Affairs (“EEA”) and the Massachusetts Office of Coastal Zone Management (“CZM”), its designated lead agency, and must be embraced by the broader partnership. The primary objective of this project is to assist in the development of ocean management planning framework options for the purpose of supporting development of an effective, durable, stakeholder informed, science based and spatially explicit integrated ocean management plan for Massachusetts.

## **Background**

MOP is a public-private partnership created to advance integrated multi-use ocean management in support of sustainable marine industries and ecosystem stewardship leading to resilient and productive ocean ecosystems in MA waters. Initiated in 2006 with support from the Gordon and Betty Moore Foundation, MOP partners - including government decision makers, marine-dependent industry, scientists, and conservation and education organizations - developed a Five Year Strategic Plan to foster collaborative problem solving on ocean management issues and develop information, tools and processes to improve the integration of science with ocean management. The partnership is now implementing the Strategic Plan with funding through 2010. For more information, please visit our website at [www.mopf.org](http://www.mopf.org).

The partnership’s vision for an effective integrated ocean management plan that supports sustainable marine industries *and* ecosystem stewardship is one that:

- integrates management across sectors, resources and agencies;
- builds on ecosystem-based management principles by taking into account interactions among ecological and socioeconomic/human use considerations and the effects of those on ecosystem goods and services in a spatially explicit manner;
- evaluates ecological and economic tradeoffs across sectors;
- reflects input from an intensive public process in order to gain the support of major affected groups and organizations; and
- establishes a process for monitoring and adapting the plan to respond to changing conditions.

The Massachusetts “Oceans Act”, signed into law this May, directs the state to develop an ocean management plan no later than December 31, 2009. Massachusetts is poised to become the first state in the nation to implement statewide integrated ocean management through considered balancing of a full range of uses – including offshore renewable energy development, fishing, maritime shipping, recreation, conservation and many others. This tremendous opportunity comes with equally tremendous challenges - among them is developing a planning framework that draws from examples of relevant “road maps” used elsewhere, for conducting an inclusive planning process and “operationalizing” that to produce effective, useful products with limited resources on a tight timeframe. The Consultant will assist MOP, the state and other partners in developing these planning tools to meet the requirements set forth in the Oceans Act and the objectives identified in MOP’s Strategic Plan.

## **Description of Work**

The Consultant will undertake a range of services and projects to assist in the development of planning framework options for integrated ocean management. MOP will develop and issue specific work orders on an ongoing basis in close consultation with CZM and with organized advice from the Working Group (see Terms section). Specific tasks may include:

- Identifying, evaluating and mining applicable lessons and approaches from relevant examples of integrated resource management frameworks from the U.S., Europe, Australia and elsewhere and others identified subsequently.
- Designing and administering stakeholder/partner needs assessments to inform development of planning framework options and help tailor planning approaches for the particular sociopolitical, economic and environmental circumstances in Massachusetts. Design considerations may include identifying substantive focus, target audiences and methodology(ies). Evaluating results. Needs assessment queries may include:
  - Identifying and documenting examples of current sector-by-sector ocean management resulting in unintended consequences and contrasting these with examples of how integrated ocean management might be more effective.
  - Identifying perceived sector-specific barriers/resistance to integrated ocean management (e.g. informational, financial, institutional, and political). Articulating sector-specific short- and long-term benefits of integrated ocean management.
  - Inventorying sector specific stakeholder needs/expectations from integrated ocean management planning. How do stakeholders expect to participate in the planning process? What use needs do the different sectors anticipate in the near and longer-term? What outputs/results do stakeholders expect from ocean management planning?
- Developing alternative approaches to integrated ocean management for consideration by CZM and EEA. These alternative framework options may inform processes and structures to support the following planning elements:
  - Identification of core principles and shared goals
  - Incorporation of stakeholder and science advisory functions
  - Use of decision analysis and support tools
  - Development of indicators and evaluation tools for measuring success
  - Understanding of formal policy/management decision-making, environmental review and permitting needs
  - Exploration of public and private funding sources and mechanisms
  - Establishment of adaptive management planning protocols
  - Identification of high quality end products or “outputs” from integrated ocean planning
- Conducting targeted outreach to gather feedback on planning framework alternatives from resource management, legislative and executive decision makers, other partners and broader stakeholders through workshops, on-line forums and other programs tailored for target audiences.
- In cooperation with CZM and incorporating partner/stakeholder feedback processes, making recommendations for planning framework options.

- Providing strategic and technical planning support services to MOP, the Commonwealth and other partners to employ the preferred planning framework.

### **Qualifications, Skills and Expertise**

MOP seeks a team of Consultants with the multi-disciplinary expertise, demonstrated skills, and proven experience necessary to assist in the development of planning framework options to support integrated ocean management. The Consultant must be able to work flexibly in a changing environment. The Consultant's expertise, skills and experience should include the following:

- Rigorous theoretical grounding in approaches to and demonstrated applied experience in designing and providing technical support for implementation of complex comprehensive natural resource planning efforts
- Substantive expertise and applied experience in disciplines including environmental and economic policy, natural resource management, relevant marine science, and comprehensive planning
- Knowledge of and experience applying ecosystem-based management (EBM) approaches, and familiarity with relevant examples from other geographic areas
- Familiarity with historical and current ocean management issues in the broader Gulf of Maine / northeastern region
- Proven success achieving objectives and delivering quality products on scientifically complex, multi-stakeholder environmental policy projects in a politically charged, deadline driven environment
- Demonstrated ability to effectively convene, facilitate and manage multi-stakeholder processes
- Demonstrated experience conceptualizing, designing, conducting and interpreting results of stakeholder needs assessments or similar instruments
- Exemplified ability to communicate effectively with a broad range of stakeholders and develop materials responsive to different audiences' needs

### **Terms**

The Consultant will report directly to the MOP Science Program Manager with the development and implementation of work orders and evaluation of deliverables coordinated closely with CZM management. The Consultant will receive organized advice from a diverse Working Group of partners managed by the MOP Science Program Manager, who will serve as a cross-sectoral sounding board for the project. The Consultant is expected to coordinate effectively with MOP, CZM, and the Working Group utilizing electronic communication, on-line collaboration tools, in-person meetings or other appropriate means. The selected Consultant will provide services through December 5, 2008 on a work order basis with the possibility of extending services through December 2009. The Consultant's fee will be negotiated at the time of selection and the contract will be administered through the University of Massachusetts Boston ("UMB") as MOP's fiscal sponsor.

### **Proposal Requirements**

Respondents should submit a proposal to the MOP Science Program Manager for electronic receipt no later than 5pm on Friday July 11, 2008. Electronic submissions should be submitted as a single PDF and directed to Nicholas Napoli, MOP Science Program Manager at [nnapoli@mopf.org](mailto:nnapoli@mopf.org). A copy of the full submission should be cc'd to: Robbin Peach, UMB Co-principal Investigator at [robbin.peach@umb.edu](mailto:robbin.peach@umb.edu).

Respondents should also submit one hard copy each, postmarked no later than July 11, 2008 to: Nicholas Napoli, MOP Science Program Manager, MA Ocean Partnership, University of MA/Boston, Healey 10<sup>th</sup> Fl. 100 Morrissey Blvd., Boston, MA 02125 and to: Robbin Peach, University of MA/Boston,

McCormack Graduate School of Policy Studies, 100 Morrissey Blvd., Boston, MA 02125.

At a minimum, all submittals must include:

1. A cover letter
2. A statement (maximum of five pages) demonstrating the team's understanding of the project, indicating how the team meets the desired qualifications, skills and expertise, and describing a generalized approach to developing the framework options and designing/conducting the needs assessment
3. A description of the team's qualifications, including resumes for key personnel, summaries of successfully completed relevant projects and associated deliverables, and a description of each team member's role in those projects
4. A description of the team's structure with an organizational chart identifying the Principal Investigator, each team member's role, and the lead contact from each sub-consultant (if applicable)
5. A statement of availability and loaded daily or hourly rates including fringe and overhead through December 5, 2008 for each of the key personnel
6. A statement identifying matching resources (if any), including cash, in-kind services, and solid funding leads or similar projects currently under consideration for funding

#### **Proposal Review**

A MOP Selection Committee will evaluate proposals based on the team's qualifications, understanding of the project, approach to planning framework option development, proven relevant experience, and cost effectiveness. When considered together, these criteria will provide the committee its basis to evaluate the overall value of each proposal with the aim of securing the most advantageous arrangement to meet the goals of the project. Selection of the preferred consultant is expected to be a two-step process in which short-listed consultant teams will be asked to provide oral presentations to the MOP Selection Committee, after which the Committee will recommend a preferred consultant team for approval by MOP's Governing Board. The Committee may choose to forego oral presentations if a preferred candidate emerges based solely on the responses to this solicitation. MOP may pre-qualify more than one consultant or team of consultants through this process.

#### **Consultant Briefing**

A pre-bid conference will be held on Thursday, June 26, 2008, at 11:00am at the Healey Library, UMB campus. Minutes from the pre-bid conference will be distributed and posted on [www.mopf.org](http://www.mopf.org) within two business days following the pre-bid conference. Please contact Tricia Bonifacio at [tbonifacio@mopf.org](mailto:tbonifacio@mopf.org) for further details.

MOP contact:

Nicholas Napoli, Science Program Manager  
Massachusetts Ocean Partnership  
UMass Boston - Healey 10th Floor  
100 Morrissey Blvd.  
Boston, MA 02125  
ph: 617-287-3926  
c: 617-981-2786  
email: [nnapoli@mopf.org](mailto:nnapoli@mopf.org)