

**Massachusetts Ocean Partnership**

**Request for Qualifications**

**To**

**Support Development and Application of Socioeconomic Data and Analyses**

**Necessary**

**For**

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

**October 17, 2008**

## **Introduction**

The Massachusetts Ocean Partnership (“MOP”) is seeking qualified consultants or research teams (“Consultant(s)”) to support development and application of socioeconomic and cultural data, analyses and tools in support of integrated ocean management planning in Massachusetts’ state waters. MOP’s Gap Analysis and other studies have identified the lack of socioeconomic data as a significant barrier to ecosystem-based management of the Massachusetts coastal ocean. In 2007, MOP commissioned a team of economists to identify the economic tools and analyses available for use in integrated ocean management and their applicability to Massachusetts. Building from that earlier work, the objective of efforts under this RFQ will be to apply these tools to develop socioeconomic data, conduct analyses, and educate resource managers on the utilization of these analyses.

## **Background**

MOP is a recently established 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, including its science program, with funding through 2010. For more information, please visit our website at [www.masscoceanpartnership.org](http://www.masscoceanpartnership.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 trade-offs 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 in May 2008, directs the Commonwealth to develop an integrated ocean management plan no later than December 31, 2009. The Executive Office of Energy and Environmental Affairs (“EEA”) is charged with the responsibility and authority to develop the plan. 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.

## **Description of Work**

The Consultant(s) will provide a range of services to assist the Partnership with the development and utilization of socioeconomic data, analyses and tools in ecosystem-based coastal ocean management. The Consultant(s) will be expected to assist in the selection and application of appropriate methodologies to develop socioeconomic data, conduct analyses, and enhance the use of these data and tools by decision makers and resource managers. Potential areas of assistance include:

### Human use data

Consult with MOP to identify priority human use data needs relevant for coastal ocean management. Develop and implement methodologies to acquire and model human use data and provide recommendations on the application of human use data in spatial planning for the ocean.

### Market and non-market valuation studies

Conduct market and non-market valuation studies to estimate the value of coastal ocean ecosystem goods and services for use in ocean management planning. Consult with MOP and EEA to identify studies that can be conducted and yield useful data in the short-term (spring 2009) and longer-term (1-2 years). Work with MOP to identify appropriate valuation methodologies for each particular scenario, determine the cost of implementation, conduct the analysis, and prepare a written summary of the methodology and results.

### Modeling and decision support tools

Provide assistance on the incorporation of socioeconomic data and studies into spatially integrated ecological economic models and decision support tools. Collaborate as needed with MOP's modeling consultants on trade-off, scenario, and other analyses to inform coastal ocean policy and management decision making by determining the cost, benefits, and impacts of various scenarios and management alternatives.

### Education and training

Educate resource managers and decision makers on the potential uses of socioeconomic data and analyses at various forums designed to enhance the understanding and utilization of economic tools. The Consultant(s) will be expected to participate in the design of these forums, develop materials and agendas, train meeting participants on the use of economic analyses in resource management, and assist with the development of meeting summaries.

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

MOP seeks Consultant(s) with the range of skills and proven experience necessary to identify and implement the appropriate economic methodology to acquire and interpret socioeconomic data for coastal ocean management. The Consultant(s) must be able to work in a flexible, fast-paced and changing environment, and understand the various uses of socioeconomic data and potential user groups. The Consultant's skill set should include the following expertise:

- Direct knowledge of available socioeconomic data for immediate use in Massachusetts coastal ocean management
- Direct knowledge and successful implementation of techniques for collecting and analyzing human use data
- Successful experience designing and conducting a variety of market and non-market valuation studies, including but not limited to:
  - Revealed preference methodologies
  - Stated preference methodologies
  - Benefit transfer
- Successful experience applying trade-off and scenario analyses to coastal ocean management issues. Potential analyses may include, but are not limited to:

- Cost-benefit analyses
  - Cost-effectiveness analyses
  - Economic impact analyses
- Working experience with a variety of models and decision support tools that incorporate economic data and analyses, including integrated ecological economic models of ecosystem services
- Exemplary ability to effectively communicate economic methodologies and their application to resource management to a broad range of stakeholders
- Familiarity with historical and current ocean management issues in the broader Gulf of Maine / northeastern region

### **Ongoing Work**

MOP wishes to coordinate its socioeconomic data development and analysis activities with existing efforts in order to leverage resources and avoid duplication. Please describe any ongoing socioeconomic data development or analyses relevant to coastal ocean management that may be leveraged and applied to the evolving ocean planning efforts in Massachusetts.

### **Terms**

The Consultant(s) will report directly to the MOP Science Program Manager, with the development and implementation of work orders and evaluation of deliverables coordinated closely with EEA. The Consultant(s) will also interface and coordinate with MOP partners and MOP's planning, data network, and modeling consultants. The selected Consultant(s) will provide services on a contractual basis. 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 fiscal sponsor of MOP.

### **Budget**

All contracts with MOP's fiscal sponsor – McCormack Graduate School of Policy Studies/University of Massachusetts Boston (MGS/UMB) must meet the following budget requirements:

- A. Benefits: Fringe benefits for domestic employees are limited to 35% of gross salary, but should not be in excess of the organization's actual benefit rate. Grants that include benefits for foreign employees may submit benefit rates which comply with local law.
- B. Indirect cost (overhead): Indirect rates ranging from 0% to 12.5% of total direct costs are allowable, except if applicant resides at UMB.

### **Submission Requirements**

A qualifications package should be submitted as a single PDF directed to Nicholas Napoli, MOP Science Program Manager at [nnapoli@massoceanpartnership.org](mailto:nnapoli@massoceanpartnership.org) for electronic receipt no later than 5pm on Friday November 14, 2008. 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 to: Nicholas Napoli, 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 demonstrating the Consultant's understanding of the project, indicating how the Consultant meets the desired qualifications, skills and expertise
3. A description of the Consultant's qualifications, including resumes for key personnel, summaries of successfully completed relevant projects, associated deliverables and references, and a description of each member's role in those projects
4. A description of the team's structure with an organizational chart identifying the Project Manager, each team member's role, and the lead contact from each sub-consultant (if applicable)
5. A statement of availability, daily or hourly rates, the organization's fringe rate (not to exceed 35%), and projected indirect cost rate (not to exceed 12.5% of direct costs) through December 5, 2009 for each of the key personnel
6. A statement identifying relevant ongoing, recent or near future work that may be leveraged and applied to Massachusetts

### **Qualification Review**

A MOP Selection Committee will evaluate applications based on the Consultants' qualifications, understanding of the project, proven relevant experience, and cost effectiveness. When considered together, these criteria will provide the committee its basis to evaluate the overall value of each applicant with the aim of securing the most advantageous arrangement to meet the goals of the project. Selection of the preferred consultant(s) may be a two step process in which short-listed Consultant(s) are asked to provide oral presentations to the MOP Selection Committee, after which the Committee will recommend preferred Consultant(s) for approval to the MOP Governing Board and MGS/UMB. The Committee may choose to forego oral presentations if a preferred candidate emerges based solely on the responses to this solicitation. MOP may prequalify more than one Consultant through this process.

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@massoceanpartnership.org](mailto:nnapoli@massoceanpartnership.org)