



**OZAUKEE
WASHINGTON**

Land Trust

Ozaukee Washington Land Trust

Request for Proposals

Wildlife Biodiversity Program Development

RFP release date: Tuesday, February 18, 2025

Virtual Q&A: Friday, February 28, 2025 at 11:00 am

Proposals due: Tuesday, March 11, 2025 at 8:00pm CDT

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Project Overview

The Ozaukee Washington Land Trust (the “Land Trust”) owns and manages over 2,400 acres across 36 nature preserves located in Washington, Ozaukee, and Milwaukee counties. These preserves lie within proximity to a mix of urban and rural land uses including a variety of developed landscapes (industrial, commercial, high and low density residential), working lands (predominantly crop land), and natural areas including forests, fields and waterways.

The majority of the Land Trust’s protected acres are within areas delineated by the Southeast Wisconsin Regional Planning Commission (SEWRPC) as Primary and Secondary Environmental Corridors, including several designated as Natural Areas. These landscapes include diverse and relatively intact natural communities and yet wildlife data within these areas is often sparse or non-existent. With a better understanding of the historic and current wildlife species presence, Land Trust will be better positioned to maintain and enhance biodiversity on these landscapes.

To foster wildlife biodiversity, we seek to identify species that are at-risk in a local context – species which are often overlooked in federal and state-wide assessments. Through this project, we will better characterize local wildlife populations, allowing us to implement “focal species” based management that will be supported through ongoing inventory and monitoring across our preserves.

Project Goal and Objectives

The project goal is to enhance and protect biodiversity on our preserves and therefore within the region, through the development of tools and guidance to support species-focused habitat management.

The project objectives are to provide actionable recommendations that the Land Trust will use to enhance and protect the biodiversity and resiliency of its highest quality habitats and rare inhabitants. We desire to create a wildlife biodiversity program that is relatively simple to implement, is sustainable, and that contributes to conservation of the living environment.

Scope of Work

Data Harvest and Geodatabase Creation

The selected vendor will review existing faunal inventory records to identify presence and absence of wildlife species in the Land Trust service area. The vendor will collect, digitize, standardize, vet, geo-reference, and assign confidence scores to the wildlife data, and then assemble this data into a geodatabase. Anticipated data sources include Land Trust data, online community databases, museum records, partner data, literature records, and all other appropriate sources. The data will be assembled into a reference geodatabase, and a summary report of the process and findings will be provided. At a minimum, the geodatabase data will include for all

records found, the location, date, species, confidence score, and data source. Final design will be defined in consultation with the selected contractor and in conjunction with the Land Trust's GIS advisor (available for GIS support throughout the project).

Deliverables:

- a. Copy/scan of raw data records
- b. Excel spreadsheet with raw data and all information attached to each record that will be the foundation of the geodatabase.
- c. Reference geodatabase (ArcGIS Pro compatible) to act as repository for historic and future data collection and screening and visualization tools across our service area.
- d. Summary report of process, analysis, and findings to act as a record of this effort.

Analysis

Vendor will utilize the geodatabase to create species checklists (service-area wide and preserve specific) and will analyze data to identify species occupancy/ close proximity, local rarity, gaps in data, and develop more refined focal species lists for each preserve. For each species on the checklist, vendor will provide management and monitoring program recommendations assembled into a glossary for input into focal species based management plans.

Focal species selection will be based on species of greatest conservation need, threatened and endangered status, locally rare species, and species that hold social value in the Land Trust's service area. The list will be refined by evaluating suitability of the preserve to host a particular species through occupancy/proximity data and critical habitat assessments of current and potential vegetative communities. Knowledge gaps will be identified and prioritized for future inventory and monitoring work.

Deliverables:

- a. Develop service area-wide Focal Species Glossary for all species identified as potential focal species. Include associated general management recommendations, critical habitat requirements, and preferred monitoring plan each focal species
- b. Create focal species lists for each preserve based on available wildlife data and current and potential habitat suitability
- c. Identify gaps in wildlife species knowledge for each preserve and in general for service area
- d. Develop monitoring and management recommendations for each focal species based on available knowledge for each preserve

Biodiversity Handbook

The vendor will document the process of executing this scope within a biodiversity handbook created by the vendor. The handbook will include (i) how to maintain, update, and use the vetted geodatabase, (ii) a set of Standard Operating Procedures (SOPs) for inventory and monitoring each taxa i.e. grassland birds, (iii) a Focal Species Glossary including general management

recommendations and monitoring plan, (iv) decision keys and screening process, and (v) a guide to maintaining our biodiversity program and incorporating biodiversity data into preserve management decisions. The handbook should provide the Land Trust with the tools and knowledge it needs to sustain and grow its biodiversity monitoring program.

Deliverables:

- a. Biodiversity handbook as outlined above

Alternate Additional Scope of Work Components

Inventory and Monitoring

Using the output from Analysis component, the selected vendor will work with Land Trust staff to prioritize locations for additional inventory and monitoring in habitat identified as suitable for specific species or to address gaps in knowledge for priority species and taxa on priority preserves.

Survey efforts will be performed by vendor for determined priority taxa and preserves as budget and timeline allows. Vendor will incorporate the resulting data into the new geodatabase. Vendor is to provide a cost and schedule for additional surveys as part of submission requirements.

Deliverables:

- a. Raw data and input into geodatabase
- b. Updated management recommendations for management plans as appropriate

Project Timeline

Deadline	Activity
2/18/2025	RFP circulated to survey vendors and posted on website
2/24/2025	Deadline to submit questions by 5pm Monday, February 24 and RSVP to the Q&A session
2/28/2025	Virtual Q&A Session with interested parties at 11am - 12pm on Friday, February 28 PM. Zoom link will be sent to RSVPs.
3/03/2025	Questions answered and posted publicly
3/11/2025	Deadline for submissions by 8pm CST
3/17-18/2025	Interviews of selected candidates
3/21/2025	Selected vendor chosen
3/28/2025	Final Contract Executed
4/1/2025	Project Start Date
10/31/2026	Project Completion Date

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- **Cost:** The total price of the proposal, as well as the reasonableness, explanation, and budget detail of the cost.
- **Experience:** The vendor's experience, demonstrated by a minimum of 3 examples of similar projects, qualifications of staff, and record of performance.
- **Technical capabilities:** The vendor's technical approach and capabilities to deliver on all activities and deliverables.
- **Project approach:** The vendor's approach to the project.
- **Customer references:** The vendor's reputation and customer references from similar survey projects.
- **Affirmative Action Plan documentation** (see Submission Requirements below).

Submission Requirements

Proposals must provide a comprehensive approach to how the proposed vendor will meet the goal, objectives, deliverables, timeline, and evaluation criteria described above. A detailed cost schedule for wildlife surveys by taxa must be included.

This project is funded by the State of Wisconsin. Wisconsin Affirmative Action Plan Requirements must be addressed by one of the following three options: (1) providing the documentation required as per the guidance of the Affirmative Action Plan Requirements document in Appendix A; (2) a statement explaining your firm's ability to produce the AAP documentation by the bid award date with a description of the existing contract that has state approval, or (3) explaining why your firm is exempt from needing to have a state or other local government authorized Affirmative Action Plan.

Send complete proposal package by email no later than 8:00 PM CDT on Tuesday, March 11

Josh Schlicht
Stewardship Manager
jschlicht@owlt.org

Include in the subject of the email: [Your Company Name] Wildlife RFP

All questions and requests to participate in the Q&A session are to be addressed to Josh Schlicht at the email above. RFP responses shall be submitted via email as a PDF document. Responses shall be provided on an 8 ½" x 11" page format (excluding exhibits, samples, or other attachments) in no smaller than 11-point font.

The Land Trust shall not be responsible or liable in any manner for the risks, costs or expenses incurred by any vendor or individual, including travel expenses, in the preparation of its response to this RFP. Failure to follow the submission process and timeline may result in a submission not being considered.

Method of Award

The evaluation of each response to this RFP will be based on the vendor's demonstrated competence and responsiveness to the RFP, as well as project approach and budget. The purpose of this RFP is to identify those vendors that have the interest, experience, and capability to provide the requested services.

Selection and Notification

Vendor(s) determined by The Land Trust to possess the demonstrated competence to complete this project will be selected to move into the negotiation phase of this process. Written notification will be sent to these vendors via e-mail to the primary contact provided by the vendor in its response. Those vendors not selected will also be notified of their status in the process.

The Land Trust may select a vendor solely based on its review and evaluation of written proposals. Alternatively, the Land Trust may screen the proposals and interview several vendors, and then select a vendor based on its evaluation of the proposal and the interview. Should the Land Trust not find a suitable vendor within the RFP process, The Land Trust is not obligated to award the project to any vendor.

In completing this project, the Land Trust is accessing project funding sources that require the Land Trust and any vendor it contracts with to comply with certain state and federal reporting and transparency processes and record keeping requirements, including the State of Wisconsin nondiscrimination and affirmative action requirements.

Confidentiality

Information disclosed by the Land Trust during the selection process is to be considered strictly confidential. Information must not be released to external parties without the express prior written consent of the Land Trust. All responses and other materials which are submitted in response to this RFP will become the property of the Land Trust. In addition, the Land Trust assumes no obligation and shall incur no liability regarding confidentiality of all or any portion of a response, excluding pricing/cost information clearly identified as confidential by the responder, or any other material submitted in response to this RFP unless expressly agreed in writing to protect specifically identified information.

Appendix A.

State of Wisconsin Affirmative Action Plan Requirements



State of Wisconsin Affirmative Action Plan Requirements

Answer the following questions to determine which forms and documents must be submitted to meet the Affirmative Action Plan requirements. All documents should be submitted by email to the State Bureau of Procurement's Contract Compliance Program at DoaDeoSbopPrograms@wisconsin.gov.

To help simplify this process for you, we have noted page numbers where you can find additional instructions or sample documents from [DOA-3021P Contract Compliance Program Contractor Instructions](#) for each applicable requirement below.

In addition, every Contractor with the State of Wisconsin must post the following notices in conspicuous places which are available to employees and applicants for employment:

- [Contract Compliance Law Poster](#) (*disponible en Español*)
- Department of Workforce Development's [Wisconsin Fair Employment Law Poster](#)

If you need assistance or need help understanding the requirements, please contact the Contract Compliance Program at DoaDeoSbopPrograms@wisconsin.gov.

1. Is the contract valued at less than \$50,000.01?

- a. **Yes** – you are not required to submit affirmative action documents. There is nothing further you need to do.
 - b. **No**, the contract is valued at \$50,000.01 or more – Continue to #2.
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2. Can you answer “Yes” to any of the following statements?

My company/organization...

- has less than fifty (50) employees as of the date the contract was awarded.
 - is foreign and has a work force of less than fifty (50) employees in the United States.
 - is an agency with the federal government.
 - is a Wisconsin municipality.
- a. **Yes** – You are exempt from having to complete an affirmative action plan. Instead, you must complete and submit the following forms by email to DoaDeoSbopPrograms@wisconsin.gov:
 - i. [DOA-3023: Contractor's Subcontractor List](#) (See [page 14](#) for instructions.)
 - ii. [DOA-3024: Request for Exemption from Submitting Affirmative Action Plan](#)
 - b. **No** – Continue to #3.
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3. Does your company/organization have a balanced work force?

A “balanced work force” means an equitable representation of persons with disabilities, minorities, and women in each level (job category) of a work force which approximates the percentage of persons with disabilities, minorities, and women available for jobs at each level from the relevant labor market from which the contractor recruits job applicants.

- a. **Yes** – You are exempt from having to complete an affirmative action plan. Instead, you must complete and submit the following by email to DoaDeoSbopPrograms@wisconsin.gov:

- i. [DOA-3022: Contractor Work Force Analysis](#) (See [pages 8-9](#) for instructions.)
 - ii. [DOA-3023: Contractor's Subcontractor List](#) (See [page 14](#) for instructions.)
 - iii. [DOA-3024: Request for Exemption from Submitting Affirmative Action Plan](#)
 - iv. Supporting labor market information
 - Go to [Job Center of Wisconsin's site](#) and scroll to bottom of page to find "Economist Downloads." Click the dropdown menu under "Affirmative Action" and choose a county, then click "Download."
 - v. An affirmative action policy statement or a letter to confirm your company or organization complies with [s. 16.765, Wis. Stats.](#) and [Adm 50, Wisconsin Administrative Code](#) (See [page 7](#) for a sample statement.)
- b. **No** – Continue to #4.
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4. Was your company or organization audited and deemed compliant by the U.S. Office of Federal Contract Compliance (OFCC) within the past year?

- a. **Yes** – You are exempt from having to complete an affirmative action plan. Instead, you must complete and submit the following by email to DoaDeoSbopPrograms@wisconsin.gov:
 - i. [DOA-3023: Contractor's Subcontractor List](#) (See [page 14](#) for instructions.)
 - ii. [DOA-3024: Request for Exemption from Submitting Affirmative Action Plan](#)
 - iii. A copy of the OFCC's Acceptance/Compliance letter
 - iv. An affirmative action policy statement or a letter to confirm your company/organization complies with [s. 16.765, Wis. Stats.](#) and [Adm 50, Wisconsin Administrative Code](#) (See [page 7](#) for a sample statement.)
 - b. **No** – Continue to #5.
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5. Does your company have an affirmative action plan that has been approved by a federal, state, or local government agency within the past three (3) years?

- a. **Yes** – Typically, Wisconsin can accept an affirmative action plan that has been approved by other federal, state, or local governments. Complete and submit the following by email to DoaDeoSbopPrograms@wisconsin.gov:
 - i. A copy of a current plan approved by an agency of the federal, state, or local government
 - ii. A copy of the acceptance/compliance letter received from an agency of the federal, state, or local government
 - b. **No** – Continue to #6
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6. If none of the above apply, you must complete and submit the following by email to DoaDeoSbopPrograms@wisconsin.gov:

- a. [DOA-3784: Affirmative Action Plan Contractor Data](#)
- b. [DOA-3022: Contractor Work Force Analysis](#) (See [pages 8-9](#) for instructions.)
- c. [DOA-3023: Contractor's Subcontractor List](#) (See [page 14](#) for instructions.)
- d. Must include the company/organization's equal opportunity/affirmative action policy statement regarding equal employment in affirmative action practices, or a letter confirming compliance with [s. 16.765, Wis. Stats.](#) and [Adm 50, Wisconsin Administrative Code](#) (See [page 7](#) for a sample statement.)

- i. Must be signed by the head of the company/organization
 - ii. Must be dated within the last year
- e. A document outlining the goals and timetables to determine a balanced representation of female, handicapped, and minority employees in the work force. (See [page 11](#) for a sample.)
- f. A description of the dissemination of the policy both internally and externally. (See [page 12](#) for a sample.)
- g. A description of the system used to monitor the plan's implementation. (See [page 13](#) for a sample.)