



REQUEST FOR PROPOSALS

***Mission: Iconic Reefs* Baseline Human Use and Economic Impact Study**

OVERVIEW

Introduction and Summary

This Request for Proposals (RFP) details an invitation to submit a proposal for the development and conduct a study to collect baseline human use and economic impact data as part of the overarching monitoring of *Mission: Iconic Reefs* (M:IR) restoration work in the Florida Keys National Marine Sanctuary (Florida Keys NMS).

This RFP plays a critical role in enabling the ability to understand coral restoration and the impacts to society and is made possible through strong partnership between the National Marine Sanctuary Foundation (the Foundation) and the National Oceanic and Atmospheric Administration (NOAA).

This project specifically seeks to develop and implement a sampling and data collection strategy for the new *Mission: Iconic Reefs* Social Science Monitoring Program.

Project Background and Objectives

Mission: Iconic Reefs (M:IR) is a 20+ year-long coral reef restoration initiative within Florida Keys NMS. In its third year, this effort represents the application of current coral restoration techniques together with novel innovation and intervention activities. The social science component of this mission is meant to complement the biophysical monitoring for a robust understanding of coral restoration and the impacts to society. A methodology will be designed for regular long-term monitoring of human use/visitation and economic information such as:

- Spatial and temporal use patterns
- Activity information and use history
- Carrying capacity limits and human impacts at coral reef sites
- Expectations, importance, and satisfaction of coral reef experiences
- Acceptable resource conditions and perceived threats to coral reefs
- Environmental concern and attitudes toward restoration
- Stewardship behavior
- Economic impacts of coral restoration
- Equitable access to coral reefs, motivations and constraints

This funding opportunity includes Phases 1 - 4 as outlined in the **Estimated Project Timeline table (see below)** for three restored M:IR sites and three to four control (unrestored) sites as detailed in **Deliverables: Sampling Design**. In addition, the Foundation seeks to understand the capacity needed to expand Phases 3 and 4, sampling/data collection and data analysis/final products, to include the four remaining restored M:IR sites and four unrestored control sites, as well as a long-term vision for the socioeconomic monitoring program for M:IR. The four additional M:IR sites are Horseshoe Reef, Cheeca Rocks, Newfound Harbor and Looe Key Reef. Corresponding control sites are undetermined.

Deliverables

- **Literature and data review** - conduct a review of recent literature, studies, and data relevant to the Florida Keys (2000 to the current time period). The literature review should also demonstrate an understanding of the relevant human dimensions literature, theories and concepts; as well as an understanding of sampling, survey design and development of questions, socio-ecological frameworks, indicator development, and statistical analyses of human dimensions concepts needed to successfully address the requested near- and long-term monitoring activities. All literature reviewed should include

references to the associated studies, technical reports, and peer-reviewed articles. Data sources shall include existing socioeconomic data, social media, satellite imagery, acoustic monitoring and other uncrewed data streams; and specifically address any of the concepts outlined above under *Project Background and Objectives*.

- **Stakeholder and expert workshops** - bring together experts and local stakeholders such as academics, biophysical scientists, agency managers, NGOs, community members, business owners, recreation and tourism industries to provide local knowledge and expertise that will inform project development including sampling, survey question development, analyses of selected sites, and integration of social and biophysical data. (A minimum of four in-person workshops).
- **Data collection plan** - This RFP requests two types of data collection efforts.
 - The first is a survey(s) to collect human use and economic data outlined above under *Project Background and Objectives*. The survey(s) should follow standard survey design methods and be grounded in the appropriate theoretical framework. Survey measures should be developed and tested for data accuracy, reliability, and validity. Use of tablets and online survey software (e.g. Qualtrics) for in-person intercepts and data collection is highly encouraged for maximum efficiency and data quality control, as well as a near real-time dashboard of surveying progress (e.g., through Qualtrics or a shared Google Sheet). Mixed-mode approaches (e.g., combination of in-person, online, and/or mail surveys) are also acceptable, as long as a system is in place to track, log, and securely store data.
 - The second is using existing streams of data stemming from satellite imagery, acoustic monitoring, automated information systems (AIS), social media data and cell phone app data. These data are meant to inform spatial and temporal use patterns, types of use, carrying capacity levels and human impacts at reef sites. The two data collection efforts will complement one another and yield a more robust picture of use over time. All data collection efforts should be designed to encourage maximum efficiency and data quality control.

Proposals should include procedures for data management, quality assurance/quality control, and data analysis.

- **Sampling design** - development of a robust sampling methodology including detailed descriptions of the target sample sizes, statistical methodology for sample selection, process on how to select respondents into the sample, sampling locations, sampling schedule and period, recruitment and training of field staff, methods for maximizing response rates and dealing with non-response, tracking response rates (and breakdown), field operations and training plan by data type. The sampling methodology should follow an appropriate probability design to obtain a representative sample of user groups of restored and unrestored coral reefs in the Upper, Middle, and Lower regions of the Florida Keys. The sampling locations must cover human use at the following seven reef sites:
 - Upper Keys: Carysfort Reef (restored) and Elbow Reef (unrestored)
 - Middle Keys: Sombrero Reef (restored) and Delta Shoal (unrestored)
 - Lower Keys: Eastern Dry Rocks (restored) and Sand Key and Rock Key (unrestored)
- **Reports** - Interim progress reports are due each June 30 and December 30 of the award period and a final peer review report(s) will be required. Publication of results in journal articles and presentations to subject matter conferences are highly encouraged. Interim progress reports should include status of data collection, status and findings from the four workshops, status of data analysis and key preliminary findings.
- **Data Analysis and Final Products**- including a description of the sample, assessment of the representativeness of the sample, estimates of human use and visitation, data analysis (i.e., comparisons by region, restored and unrestored sites, appropriate analyses of human dimensions concepts, spatial and temporal analysis of use), integration of biophysical data, peer review of final results, final report, final data set and accompanying codebook.

Measures of success include:

- Bi-weekly coordination calls with the full project team to provide an update and demonstrate the progress of the work, and receive input from NOAA staff;
- Timely submission of interim progress reports to the Foundation;
- The number of public events to engage stakeholders with a minimum of four workshops throughout the Florida Keys;
- Detailed tracking and reporting of response rates;
- Sufficient sample sizes obtained for descriptive and explanatory data analyses;

- Data estimates representative of each study site by data source;
- A peer-review process with external visitor monitoring experts providing expert feedback on the quality and success of project outcomes;
- The researchers will provide one comprehensive peer reviewed report to the Foundation, that details the methods and results. It is strongly encouraged that the researchers submit to various peer reviewed journal articles. Additionally, the researchers should seek out conferences focusing on visitation, recreation and coral reefs to present the methods and findings. All reports must be ADA compliant.

Estimated Project Timeline with Milestones by Calendar Year:

Project Milestone*	2022		2023				2024				2025	
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Phase 1. Foundation Assessment												
Task 1.1 Literature and data review	○	●										
Task 1.2 Stakeholder/expert workshops		○	●									
Phase 2. Methods Development												
Task 2.1 Sampling methodology	○	○	○	●								
Task 2.2 Data collection plan	○	○	○	●								
Task 2.3 Peer review of methods			○	○								
Phase 3. Sampling and Data Collection												
Task 3.1 Recruit and train field staff				○	●							
Task 3.2 Onsite intercept sampling				○	○	○	○	○				
Task 3.3 Data collection				○	○	○	○	○	○			
Phase 4. Data Analysis/Final Products												
Task 4.1 Data processing				○	○	○	○	○	●			
Task 4.2 Data analysis								○	○	○	○	
Task 4.3 Integration of biophysical data								○	○	○	○	
Task 4.4 Peer review of final results										○	○	
Task 4.5 Final report									○	○	○	●

* Asterisk denotes deliverable, ○ indicates the task is in progress, ● reflects when final deliverable is due

Requirements

- Demonstrated understanding of social science theory and methods in visitor sampling, estimation, and monitoring in a range of settings;
- Experience developing data collection methodology and conducting visitor use monitoring studies specific for coastal and marine protected areas, preferably Florida Keys National Marine Sanctuary;
- Experience in survey design and development of indicators measuring human dimensions of coral reef ecosystems;
- Experience working collaboratively with various agencies involved in the management of marine and coastal areas;
- Experience integrating biophysical and socioeconomic data;
- Knowledge of the unique perspectives and legal mandates that guide work in the Florida Keys NMS located in Monroe County, Florida;
- A process that allows management agencies to contribute throughout each phase of the project and to communicate directly with researchers on the application of the results and implementation;
- Knowledge of sampling and data collection logistics in the Florida Keys, including anticipated potential issues and solutions;
- Trained statistician experienced in social science data analysis and interpretation of results;
- Large population survey administration capabilities to include the ability to recruit field staff, training capacity, programming for appropriate survey type (online, tablet), a data processing plan, strategies for tracking and maximizing response rates, etc.;
- Proven ability to fundraise and leverage resources in human dimensions work;

- Ability to establish an on-site field team, to include:
 - an adequate and appropriate team of field staff (located in the Florida Keys, are sociable/comfortable approaching and speaking with strangers, responsible, timely, etc.) who will conduct in-person intercepts and surveys (if applicable) with the population of interest at the sampling sites, and record and transmit data;
 - a field coordinator located on site in the Florida Keys to train and supervise field staff, manage schedules, assure quality data collection.

Funding Availability

Current funding is available in the amount of \$310,005. The Foundation expects to issue the award during the summer of 2022. The project will be carried out across 3 years and should be completed by May 31, 2025. Funding for the Expanded Scope to include Phases 3 and 4 at the additional sites, and for long-term monitoring, is contingent upon future funding availability. Awards may be amended to include the additional scopes if funding becomes available.

Period of Performance

Start Date: September 12, 2022

End Date: May 31, 2025

ELIGIBILITY

In general, the Foundation will assess the eligibility criteria below to ensure the proposal is eligible for this program before sending the proposal to reviewers:

- The applicant has survey experience in the Florida Keys;
- The applicant is a formal or informal education institution, small business, non-profit, or a Tribal, state, or local government;
- The applicant does not have a paid staff member serving on the Foundation's Board of Trustees;
- The applicant is not a federal government agency, a foreign entity, or an individual;
- Project work is conducted by a U.S. organization in the United States or territories;
- The applicant can provide a federal tax id #, SAM number, and independently audited financial statements for the applicant or its fiscal sponsor.

TIMELINE

- August 12, 2022 - Request for Proposals Opens
- August 28, 2022 - Request for Proposals Closes
- August 29- September 9, 2022 *Foundation review period – applicants may be contacted for interviews or additional information*
- September 9, 2022 - Notification of Awards to Applicants
- September 12, 2022 - Grant Terms Start

HOW TO APPLY

Proposals should be submitted by 11:59pm EST on Sunday, August 28, 2022. Send all required proposal documents as separate attachments in one email. Required documents are listed below. Email proposals to RFP@marinesanctuary.org. Send your email, with the subject line: **Mission: Iconic Reefs Baseline Human Use and Economic Impact Study Grant Application:** [Name of Organization]/[Title of Project].

The Grant Application with Budget template can be found here: [GRANT APPLICATION WITH BUDGET TEMPLATE](#). Please convert your application and any attachments to a single .pdf file, named with this format: ORGANIZATION_NAME-DOCUMENT_TYPE.pdf. Applications should **not exceed 20 total pages**. Additional required documents should be submitted as separate attachments.

Applicants may request additional information by emailing Erin Jaszczak, ejaszczak@marinesanctuary.org.

Required Documents

1. Grant Application with Budget (**Attachment A**) (*Maximum of 20 pages*)
 - Project Summary: Project Title, start and end date, total budget and requested funding, project summary
 - Applicant organization description
 - Project Narrative
 - Deliverables/Timeline
 - Goals/Outcomes
 - Budget: Full budget for each phase of the project and related budget narratives
 - Expanded Scope - the proposal submission should include a section for additional resources needed (funding, expertise and personnel) to expand Phases 3 and 4 to the four remaining restored sites (Horseshoe Reef, Cheeca Rocks, Lower Keys, Newfound Harbor, and Looe Key Reef) and four unrestored control sites.
 - Long-term Monitoring Plan - the proposal submission should include a section for the researchers' vision of the comprehensive long-term monitoring program for M:IR including timing of regular data collection by source, additional resources needed (funding, expertise and personnel) and process to integrate socioeconomic and biophysical data.
2. Most recent audited financial statement for applicant for fiscal sponsor
3. Curriculum vitae or resume for Principal Investigator(s) and all core project team members

The organization representative who submits the proposal via email, as well as anyone copied on that email, will receive a return email within 2 business days from the Foundation confirming that we have received your proposal. All organizations that submit a proposal will receive notification whether or not your project is selected for funding by September 9, 2022. Please direct any questions to Erin Jaszczak, Program Manager (ejaszczak@marinesanctuary.org). *At any time during the review process the Foundation may request additional information or details regarding an applicant's proposal.*

REVIEW AND SELECTION PROCESS

Proposals will be reviewed by the Foundation, with support from selected external reviewers, and will be evaluated based on how well they align with the needs and requirements of the project. Proposals may also be evaluated by independent external reviewers for technical merit.

Final awardee must submit interim progress reports each June 30 and December 30 of the award period, a current audited financial statement each December 30 of the award period, and a final report due 30 days after the performance period end date. The Foundation will provide standard progress reporting forms.

ADDITIONAL INFORMATION ABOUT THE FOUNDATION

The National Marine Sanctuary Foundation, founded in 2000 by America's most influential ocean conservation leaders, works with communities and NOAA to conserve and expand these special places for a healthy ocean, coasts, and Great Lakes. Sanctuaries and monuments are our essential network of protected waters, owned by every American and championed by us. Connected by currents, they sustain miraculous species, coastal communities, and our shared heritage. The Foundation is a leading voice for U.S. protected waters, and our work extends from the ocean floor to the classroom to Capitol Hill. The Foundation supports a growing portfolio of Community Stewardship, Outreach, and Education programs aimed at providing students, educators, and lifelong learners with opportunities to explore and discover connections to the natural world, no matter where they live.

REVIEW AND SELECTION CRITERIA

Proposed projects will be reviewed and ranked based on the criteria below:

A. Technical Merit (40 points)

- a. Does the application clearly demonstrate the ability to meet the requirements of the project?
- b. Does the application clearly describe how the project will be executed logistically and include details sufficient to determine that it can reasonably be completed in the proposed time frame?
- c. Does the applicant define success targets and milestones, and have clear project outputs and outcomes?
- d. Does the applicant demonstrate a process for collaborating with management agencies throughout all phases of the project?
- e. Does the applicant have experience bringing together various stakeholders to inform project development?
- f. Does the applicant provide a clear vision of a comprehensive long-term monitoring program for M:IR?

B. Qualifications of Applicants (45 points)

- a. Does the applicant meet all eligibility requirements?
- b. Does the applicant demonstrate experience and ability to meet capacity requirements?
- c. Do PIs and team members have experience working in the Florida Keys and in developing and implementing human dimension surveys?
- d. Does the proposal include procedures for data management, quality assurance/quality control, and data analysis?

C. Project Costs (10 points)

- a. Does the applicant adequately justify the proposed budget request, with all necessary and associated details? Is there sufficient detail to verify that the budget request is reasonable for the type of objectives proposed?
- b. Are requested funds for salaries and fringe benefits only for those personnel who are directly involved in implementing the project? Does the budget adequately detail the amount of time each current staff member will spend on the project?

D. Submission Quality (5 points)

- a. Does the applicant's proposal include all the required elements and documents?

