



Socioeconomics in the Great Lakes to Support National Marine Sanctuary Designations

Request for Proposals (RFP)

Implementation Period

February 1, 2025 – December 30, 2026
Projects should span 2 years.

Application Package Due

Friday, January 10th, 2025
11:59 PM Eastern Standard Time

BACKGROUND

Social science is a necessary component to inform management about sanctuary uses, pressures and attitudes towards these special places. 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 the four sites
- Expectations, importance, and satisfaction of resources within NMS and NMS programs
- Acceptable resource conditions and perceived threats to sanctuary resources
- Environmental concern and attitudes toward restoration
- Stewardship behavior

This Request for Proposals (RFP) details an invitation to submit a proposal to develop and conduct a study to estimate human use and visitation along with attitudes and perceptions of users within the three designated national marine sanctuaries and proposed national marine sanctuaries in the Great Lakes.

This RFP plays a critical role in enabling the ability to understand baseline data prior to and at the beginning of national marine sanctuaries. This work is made possible through a strong partnership between the National Marine Sanctuary Foundation (the Foundation) and the National Oceanic and Atmospheric Administration (NOAA).



This project specifically seeks to develop estimates of use by locations within existing and proposed national marine sanctuaries along with understanding users and non-users perceptions towards sanctuary designations and management.

PROJECT PROCESS

The timeline of project activities should be clearly addressed in the applicant's proposal. Project proposals that do not address whether work can be completed within the noted timeline will not be rated as highly in the review process. Project duration should be no more than 2 years and will not extend beyond December 30, 2026.

This funding opportunity includes Phases 1 - 4 as outlined in the **Estimated Project Timeline table (see below)** for three sites within the Great Lakes: Wisconsin Shipwreck Coast, Lake Ontario NMS and the proposed sanctuary in Lake Erie's Pennsylvania's waters. as detailed in **Deliverables: Sampling Design**.

Deliverables

- **Literature and data review** - conduct a review of recent literature, studies, and data relevant to the human use and human dimensions in the Great Lakes. 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 two in-person or virtual workshops per site).
- **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 identifying and using relevant and existing streams of data stemming from partner data collection, satellite imagery, acoustic monitoring, automated information systems (AIS), social media data and cell phone app data. (Not all data needs to be used, but explanations as to why specific data is or is not used is required in the final report). These data are meant to inform spatial and temporal use patterns, types of use, carrying capacity levels and human impacts at NMS in the Great Lakes. 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 the three sites. The sampling locations must cover human use at the following three sites:
 - Wisconsin Shipwreck Coast NMS
 - Lake Ontario NMS, and
 - the proposed sanctuary in Lake Erie's Pennsylvania.
- **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

- Bi-weekly coordination calls with the full project team to provide an update and demonstrate the progress of the work, and receive input from relevant partners
- 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 Great Lakes
- Detailed tracking and reporting of response rate
- 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 maritime heritage to present the methods and findings. All reports must be ADA compliant.

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 Great Lakes region.
- 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.

Competitive proposals will incorporate diversity, equity, inclusion, justice, and accessibility in the performance of work. In addition, priority will be given to projects that directly benefit or support communities in need and involve community members in all aspects of the project, from planning to execution.

HOW TO APPLY

Application packages should be submitted by 11:59 PM Eastern Standard Time on Friday, January 10, 2025. Please submit your application package to the Foundation through C-STAAR – the Foundation's Collaborative System for Tracking Activities, Awards, and Reporting - using the following link: <https://marinesanctuary.smartsimple.com/> .

Please direct all questions regarding this RFP to RFP@marinesanctuary.org with the email subject line: RFP Socioeconomics in the Great Lakes to support National Marine Sanctuary Designations Question: [Name of Organization].

Application packages should include:

- Completed Proposal
- Budget
- Proof of Past Performance

Determinations will be made by January 22, 2025, and applicants notified shortly thereafter.

Desired Capabilities

- 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 within lakes
- Experience in survey design and development of indicators measuring human dimensions of lake 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 national marine sanctuary system, including designation sites
- 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 national marine sanctuaries, 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 communities of the four sites, 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 in the Great Lakes to train and supervise field staff, manage schedules, assure quality data collection.

Evaluation Criteria

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 awardees 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.

The technical review and evaluation process will be graded by the following point system. Each proposal will be subject to a technical review process and evaluated on the objectives and priorities stated above.

Budget Requirements

The budget shall not exceed \$260,000.

Evaluation Criteria	Sub-Questions	Score	Scoring for this criterion will be assessed on how well proposals:
Technical Skills and Project Feasibility	<p>Does the application clearly demonstrate the ability to meet the requirements of the project?</p> <p>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?</p> <p>Does the applicant demonstrate a process for collaborating with management agencies throughout all phases of the project?</p> <p>Does the applicant provide a clear vision of a comprehensive long-term monitoring program.</p>	40	<p>Demonstrate a thorough level of planning that will allow the applicant to begin the project promptly and complete the project within the period of the performance timeline. Considerations include:</p> <ul style="list-style-type: none"> • Does the applicant define success targets and milestones, and have clear project outputs and outcomes? • Does the applicant have experience bringing together various stakeholders to inform project development? • Do activities take place during the implementation period?
Qualifications of Applicant	<p>Does the applicant meet all eligibility requirements?</p> <p>Does the applicant demonstrate experience and ability to meet capacity requirements?</p> <p>Do PIs and team members have experience working in the Great Lakes and in developing and implementing human dimension surveys?</p> <p>Does the proposal include procedures for data management, quality assurance/quality control, and data analysis?</p>	45	<p>Demonstrate past performance and experience show that previous work has been:</p> <ul style="list-style-type: none"> • Completed on time and within budgetary requirements. • Complied with contractual obligations. • Satisfactorily met the customer's standards.
Project Costs	<p>Does the applicant adequately justify the proposed budget request, with all necessary and associated details? Is there</p>	10	<p>Provide a detailed list of specific items, tools, materials, etc., and associated costs for each expense category. Considerations include:</p>

	<p>sufficient detail to verify that the budget request is reasonable for the type of objectives proposed?</p> <p>Are requested funds for salaries and fringe benefits only for those personnel who are directly involved in implementing the project?</p>		<ul style="list-style-type: none"> • Are explanations provided for how each item in the budget table supports project activities? • Does the budget adequately detail the amount of time each current staff member will spend on the project?
Submission Quality	Does the applicant's proposal include all the required elements and documents?	5	Demonstrate a clearly articulated plan to address all requirements of the scope of work, budget, and timelines.
Total Points	100		

Funding Availability

Current funding is available in the amount of \$260,000. The Foundation expects to issue the award in the early part of 2025. The project will be carried out across 2 years and should be completed by December 30, 2026. 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.

Timeline

- December 12, 2024 - Request for Proposals Opens
- January 10, 2025 - Request for Proposals Closes
- January 11- 22, 2025, *Foundation review period - applicants may be contacted for interviews or additional information*
- January 30, 2025 - Notification of Awards to Applicants
- February 1, 2025 - Grant Terms Start

Estimated Project Timeline with Milestones by Calendar Year:

Project Milestone	2024	2025				2026		
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Phase I. Foundation Assessment								
Task 1.1 Stakeholder/expert workshops		o	o					



Task 1.2 Literature review of relevant visitation data		○	○	●				
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 bio/geophysical data				○	○	○	○	
Task 4.4 Peer review of final results					○	○	○	
Task 4.5 Final report					○	○	○	●

○ Indicates in progress ● Reflects when final deliverable is due

ABOUT US

The National Marine Sanctuary Foundation was founded in 2000 by America’s most influential ocean conservation leaders and 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.

TERMS & CONDITIONS

This is a Request for Proposals (RFP) only. Issuance of this RFP does not in any way obligate the Foundation to make an award or pay for costs incurred by potential offerors in the preparation and submission of an offer. In addition:

- (a) The Foundation may cancel RFP and not award;
- (b) The Foundation may reject any or all responses received;
- (c) Issuance of RFP does not constitute award commitment by The Foundation;



- (d) The Foundation reserves the right to disqualify any offer based on offeror failure to follow RFP instructions;
- (e) The Foundation will not compensate offerors for a response to RFP;
- (f) The Foundation reserves the right to issue an award based on an initial evaluation of offers without further discussion;
- (g) The Foundation may negotiate with short-listed offerors for their best and final offer;
- (h) The Foundation reserves the right to order additional quantities or units with the selected offer or;
- (i) The Foundation may reissue the solicitation or issue formal amendments revising the original RFP specifications and evaluation criteria before or after receipt of proposals; (j) The Foundation may modify the specifications without issuing a formal notice to all offerors when the revisions are immaterial to the scope of the RFP;
- (k) The Foundation may choose to award only part of the activities in the RFP or issue multiple awards based on multiple RFP activities; and
- (l) The Foundation reserves the right to waive minor proposal deficiencies that can be corrected prior to award determination to promote competition.