

# Request For Proposals

California Spotted Owl Surveys on the  
San Bernardino National Forest

October 24, 2024



**Deadline for Proposal Submission:**

**November 15, 2024**

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## I. Summary

The Inland Empire Resource Conservation District, in partnership with the San Bernardino National Forest (SBNF), requests proposals from professional consulting firms to perform California Spotted Owl surveying, monitoring, and related activities on the SBNF. Project tasks must be completed by November 30<sup>th</sup> 2025.

## II. Contact and Timeline

### **Project Contact**

Inland Empire Resource Conservation District, [rfp@iercd.org](mailto:rfp@iercd.org)

### **RFP Timeline**

<b>Activity</b>	<b>Date</b>
Release of RFP	October 24, 2024
Registration Deadline	October 31, 2024
RFP Questions Deadline	October 31, 2024
Proposal Submission Deadline	November 15, 2024
Notice of Contract Award	November 26, 2024
Board Meeting/Contract Executed	December 5, 2024
Project Start Date	December 6, 2024

## III. Project Background

The purpose of this project is to determine the presence/absence and reproductive status of Forest Service Sensitive California Spotted Owls (CASPO) in pre-identified areas of suitable habitat on the San Bernardino National Forest (SBNF) during the 2025 breeding season. This information will be used by the SBNF for project planning and will contribute to the long-term dataset of occupancy and reproduction of this species on the SBNF. This project will survey up to 150 CASPO territories within the footprint shown in the map in **Attachment 1**.

The selected firm (Contractor) will complete this Project with oversight from SBNF staff. IERCD will be the contract administrator.

## IV. Scope of Services

The scope of services below describes the services to be completed by the Contractor. IERCD reserves the right to modify the scope of services at their discretion, including curtailment of some activities, to meet budget constraints and project deadline.

### **Task 1: California Spotted Owl Protocol Surveys**

#### **Task 1.1: Protocol Surveys**

The work to be performed consists of monitoring California spotted owl territories on the San

Bernardino National Forest (SBNF). The surveys will determine occupancy status (occupied vs. unoccupied), nesting status (nesting vs. non-nesting), and reproductive success (fledging success) for each territory. Nest sites will be mapped, photographed, and GPS coordinates logged for each territory if nests are located. Nest trees will be measured, identified by species, and marked with white paint and a “wildlife tree” tag (provided by the SBNF). Roost locations, juvenile sightings, and other target species observations will also be recorded

CASPO surveys for presence/absence and reproduction will be conducted on previously-identified spotted owl territories in areas specified by the SBNF. Protocol-level surveys are to be performed according to Forest Service Region 5 CASPO Protocol (**Attachment 2**) that involves a minimum of 6 presence/absence surveys per territory and a minimum of 4 reproductive surveys at all territories occupied by spotted owls. Reproductive surveys will include both nesting status surveys and reproductive success surveys. Nesting status surveys will focus on identifying nest sites early in the nesting season as specified in the Region 5 Protocol.

All work areas may be reached by driving on standard Forest Service roads, by driving on four-wheel drive roads, and/or by walking. Walking distances will vary by territory location and presence of owls. The SBNF will not provide special maintenance or snowplowing to keep roads open. The SBNF will provide gate keys to the contractor, if needed, to be returned upon completion of work. Contractor will be responsible for securing permissions across privately-owned lands, where necessary.

Contractor will supply all equipment necessary to complete the surveys as described. Equipment may include, but is not limited to: vehicles, cell phone, USGS topo maps, binoculars, field guides, GPS units, tablet, aerial photographs, survey forms, field notebooks, clipboard, etc.

For the 2025 survey year, up to 150 territories will be surveyed to protocol. Final territories will be determined by SBNF staff based on available budget and priority areas for the 2025 fiscal year. Specific territories to be surveyed in 2025 will be identified prior to the field season starting. Work is to be performed only by qualified spotted owl surveyors with adequate previous experience. The Contractor will also provide general consulting regarding habitat mapping, history of survey information, or other information regarding current or historical status of CASPO on the SBNF.

**Task 1.1 Deliverables:**

- Perform protocol-level surveys for up to 150 territories

**Task 1.2: Documentation and Reporting**

During survey efforts, sufficient information is to be collected to fully complete the deliverables as described below. This includes detailed survey notes, photographs, spatial data collection, weather condition information, etc.

**Task 1.2 Deliverables**

- Report  
A written report will be provided to the Forest Service for review and comment. The

report, provided in both pdf and word formats and submitted via accessible cloud storage or mailing a thumb/flash drive, will minimally include:

- Summary of each survey conducted (date, surveyor, etc).
  - Summary of findings (survey efforts, occupancy status, nesting status, and reproductive status for each territory).
  - A discussion of monitoring results and comparison to past territory occupancy and productivity at the same sites.
  - Where surveys are conducted in areas recently impacted by disturbance (e.g. wildfire), provide a summary of current habitat conditions for each affected territory and an assessment of whether near-future occupancy surveys are warranted.
  - Embedded representative photos of occupied habitat and nests.
  - Incidental species list and locations for all other wildlife species noted in the area (including common species).
  - If non-native plants or animals are observed during surveys, the report will contain an appendix table with the names, locations, and dates. Include photographs if possible.
  - Copies of raw field notes taken during surveys.
  - A final “CASPO Survey Tracking” summary excel spreadsheet (**Attachment 3**)
- NRM Wildlife Data Form
    - Completed NRM Wildlife Data Form – Wildlife Observation Tab (**Attachment 4**). This tab must include the list of animals observed during each survey that meet one or more of the following: 1) target species – CASPO; 2) Forest Service Sensitive or SBNF Watchlist wildlife species; 3) any other federally- or state-listed wildlife species, and 4) wildlife sites of interest observed including raptor nests, animal dens, breeding sites, etc.; 5) non-native plants or animals. Refer to **Attachment 5** for Forest Service Special Status Wildlife species.
    - Completed NRM Wildlife Data Form – Visit Tab (**Attachment 4**). Record all survey data for every survey, including surveys for which no CASPO were detected.
    - Completed NRM Wildlife Data Form – Sites Tab (**Attachment 4**). Record all nest and roost site data. Include nest/roost tree information in the notes (species, dead/living, height, diameter-at-breast-height, nest type, etc.).
  - GIS Data

The species observation data collected on the NRM Wildlife Data Form, Wildlife Observation Tab, will be provided as a file geodatabase attributed with the fields from the excel form. All spatial data must be UTM Zone 11 North datum NAD83 (specifically referred to as WKID:26911 EPSG).
  - CNDDDB

Submit digital data to the California Natural Diversity Database (CNDDDB) for each

California special animal<sup>1</sup>.

### **Task 1.3: Project Management and Communication**

The Contractor is expected to perform these project management services:

- Project organization, communication, scheduling, billing, and clerical work;
- Ensure project team safety while performing survey work;
- Take proactive approach to ensure Project timeline is met;
- Solicit clarification from SBNF when needed;
- Provide final documents and data to SBNF in digital formats, in a well-organized project record.

The Contractor will ensure that regular communication with SBNF occurs during the field season to discuss work completed to date. The contractor will submit the CASPO Survey Tracking summary weekly (**Attachment 3**) to SBNF, documenting dates on which territories were visited and results of surveys.

During this communication, the Contractor shall address the following:

- Areas surveyed and CASPO nest locations found or not found;
- Any problems encountered during surveys;
- Suggestions; and
- Results and status of surveys and whether the project is on schedule.

### **Task 1.3 Deliverables**

- Weekly CASPO Survey Tracking summary submitted to SBNF

## **V. Project Timeline**

Contractor should plan to complete surveys in accordance with the protocol, recognizing that local weather conditions (snow) may limit access at certain times of the year. A draft written report will be provided by October 1<sup>st</sup> 2025. The final report, based on Forest Service review and comments, will be completed by November 30<sup>th</sup> 2025 along with all remaining deliverables.

## **VI. Proposal Guidelines and Requirements**

### **Registration and Clarifications**

All interested firms must register with IERCD by filling out [this form](https://airtable.com/appMsCXrgGxvMTM2H/pag42EWQw72YvBgOU/form) (direct link: <https://airtable.com/appMsCXrgGxvMTM2H/pag42EWQw72YvBgOU/form>) by **5:00 p.m. on October 31, 2024**.

Direct all questions regarding this RFP to [rfp@iercd.org](mailto:rfp@iercd.org) by **5:00 p.m. on October 31, 2024**. Clarifications will be emailed to all registered firms and published electronically on <https://www.iercd.org/> under the Publications and Disclosures tab by **5:00 p.m. on November 7, 2024**. Interested firms must be registered with IERCD in order to receive RFP clarifications.

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<sup>1</sup><https://wildlife.ca.gov/Data/CNDDDB/Submitting-Data>

## **Proposal Requirements**

Proposals must include the following information:

- Cover Sheet
  - Title of proposal
  - Name and address of firm
  - Contact name, email address, and phone number
- Project Approach
  - Provide a clear statement of project understanding.
  - Describe the proposed team's approach to work, including communication process, project management, and quality control.
  - Provide a detailed description of project approach, including description of all tasks needed for successful project completion. This shall follow the general outline provided in the Scope of Services sections above. Recommended optional tasks may be listed for consideration.
  - Provide members of the proposed project team and define their role in the project.
- Qualifications and Experience
  - Provide resumes for all key project personnel. Indicate number of years each person has been employed by the firm. Resumes should highlight relevant qualifications for this project.
  - Proposed surveyors must provide at least three references with phone numbers or emails of well-known and accomplished birders who can verify the surveying biologist's knowledge of CASPO field biology and expertise in surveying for these species.
  - Proposed surveyors should have evidence of at minimum five (5) years of conducting California Spotted Owl surveys following Forest Service Region 5's protocol and evidence of at a minimum one (1) year of experience working in the San Bernardino and San Jacinto Mountains
  - Provide concise descriptions of at least two (2) comparable projects completed within the last five (5) years for which members of the proposed team provided similar services. These descriptions should demonstrate the team's experience relevant to the project described in this RFP. List members of the proposed team who worked on the project(s) and their role.
- Proposed Budget and Fees
  - For this project, please propose a per territory cost that includes all tasks and deliverables. Please provide a cost basis description for the proposed per/territory cost so that the level of effort and associated costs are to be easily understood by IERCD.

- The proposal must include a complete and fixed price. If the Scope of Services requires modification during the course of work, IERCD will determine whether to amend the current agreement or to issue a subsequent RFP for additional services.
- IERCD accepts no responsibility for costs incurred by any individual or firm submitting a proposal pursuant to this RFP.
- Proposed Project Timeline
  - Submit a project schedule incorporating milestones with completion of each task, subdivided as necessary. The start date of the schedule should be **December 7, 2024**. The actual start date will be established after the contract is awarded, and may be earlier or later than the proposal schedule. The project shall be complete by **November 30, 2025**. The proposed project schedule should fit within these start and completion dates.

### **Proposal Submission**

Submit the proposal as a single electronic PDF file by **5:00 p.m. on November 15, 2024** via email to [rfp@iercd.org](mailto:rfp@iercd.org) with the subject "CASPO Surveys Proposal." Any proposals received after the due date and time will not be considered. There is no proposal page limit, however, please keep it to a minimum and include only the necessary information. No paper submittals will be accepted, and IERCD's office is not open for deliveries. The offer in each proposal shall remain open for ninety (90) days after the submission deadline. There will be no public opening of proposals.

### **Proposal Acceptance**

IERCD reserves the right to accept or reject any and all proposals, or any item or part thereof, or to waive any informalities or irregularities in proposals.

IERCD reserves the right to withdraw this RFP at any time without prior notice, and IERCD makes no representations that any contract will be awarded to any proposer responding to this RFP.

IERCD reserves the right to postpone proposal review for its own convenience.

IERCD reserves the right to require confirmation of information furnished by proposer, or to ask the proposer for additional evidence of qualifications to perform the work, or to obtain information from any source that has the potential to improve the understanding and evaluation of the proposals.

Issuance of this RFP and receipt of proposals does not commit IERCD to award a contract. IERCD expressly reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one proposer concurrently, or to cancel all or any part of this RFP.

IERCD reserves the right to negotiate any price or provision, task order or service, accept any part or all of any proposals, waive any irregularities, and to reject any and all, or parts of any and all proposals, whenever, in the sole opinion of IERCD, such action shall serve its best interests and



those of the tax-paying public. The proposers are encouraged to submit their best prices in their proposals, and IERCD intends to negotiate only with the proposer(s) whose proposal most closely meets IERCD's requirements at the lowest estimated cost. The contract award, if any is awarded, will go to the Proposer whose proposal best meets IERCD's requirements.

Proposals received by IERCD become public information and will be made available to the public upon request after award.

Proposals submitted are not to be copyrighted.

In submitting a proposal in response to this RFP, the proposer is certifying that it takes no exceptions to this RFP including, but not limited to, IERCD's Professional Services Agreement ("Agreement"), which is included here as **Attachment 6** and made a part hereof by this reference. If any exceptions are taken, such exceptions must be clearly noted in the proposal and may be reason for rejection of the proposal. As such, the proposer is directed to carefully review the attached Agreement and, in particular, the insurance and indemnification provisions therein.

## VII. Proposal Evaluation and Selection

### **Evaluation and Selection**

Selection will be based on demonstrated competence and qualifications for the services to be performed at fair and reasonable prices. Proposed deviations from the RFP requirements will be noted and taken into consideration. The information provided in response to the RFP requirements will be the basis for evaluation. Failure to provide this information or the inclusion of any conditions, limitations, or misrepresentations may adversely affect the evaluation of your proposal.

IERCD reserves the right not to award any contract or to award multiple contracts.

Proposals will be evaluated using the following criteria:

- Demonstrated experience of the Contractor team in relation to the services required.
- Demonstrated experience, technical competence and availability of key personnel in relation to the services required.
- Recommendations of prior clients.
- Capability of the project team to provide the services desired in a timely manner.
- Value offered considering capabilities and experience of the project team.

### **Cancellation of RFP**

IERCD reserves the right to cancel this RFP at any time prior to contract award without obligation in any manner for proposal preparation, interview, fee negotiation or other marketing costs associated with this RFP.

### **Notification of Contract Award**

All entities submitting responses to this RFP will tentatively be notified of final decision award of contract by **November 26, 2024**.

IERCD may request interviews at their convenience. Every effort will be made to adhere to the stated schedule, but it may be modified as needed without prior notice.

## VIII. Attachments

All attachments to this RFP can be found at [this link](#)

Direct Link: ([https://drive.google.com/drive/folders/1RtJvpV17S-LzmogndoifyvAXZV0f\\_bKq?usp=sharing](https://drive.google.com/drive/folders/1RtJvpV17S-LzmogndoifyvAXZV0f_bKq?usp=sharing))

**Attachment 1** – CASPO Survey Area Map

**Attachment 2** – Forest Service Region 5 CASPO Protocol

**Attachment 3** – CASPO Survey Tracking Form

**Attachment 4** – NRM Wildlife Data Form

**Attachment 5** – Special Status Wildlife Lists

**Attachment 6** – IERCD Professional Service’s Agreement Template