
GLENN HEGAR
TEXAS COMPTROLLER OF PUBLIC ACCOUNTS



**Call for Proposals
for
Morrison Bumblebee and Southern Plains
Bumblebee Research**

<u>Anticipated Schedule of Events</u>	<u>Date</u>
Call for Proposals Issued	October 16, 2023
Deadline for Questions	October 31, 2023
Proposals Due	November 30, 2023
Contract Execution	Spring/Summer 2024

E-mail questions about the Call for Proposals to nat.res.research@cpa.texas.gov by 5:00 p.m. on October 31, 2023.

E-mail proposals to nat.res.research@cpa.texas.gov by 5:00 p.m. on November 30, 2023.

General Information

Purpose

The Texas Comptroller of Public Accounts (CPA) Natural Resources Program funds research to support data-driven Endangered Species Act decisions and voluntary conservation efforts. The program awards interagency contracts for services (“Contracts”) pursuant to Chapters 403 and 771 of the Texas Government Code to Texas public universities to conduct research on species of interest including candidate, petitioned or listed species under the federal Endangered Species Act.

Selection

Proposals will be evaluated according to their responsiveness to the research goals and objectives listed in the CFP, with consideration of feasibility and completion of tasks within the proposed budget and timeline.

Contract Term and Funding

The contract term and budget listed in the CFP are the maximum per proposal. Proposals for smaller projects with shorter duration and lower budgets are welcome.

Proposal Due Dates

Proposals may be submitted any time before the deadline listed on the CFP cover page.

Contract Description

Natural Resources program contracts are not grants and shall not be administered as such. Where a grant is a flexible instrument designed to provide funding to support a public purpose, a contract is a binding agreement to provide goods or services for payment, and payments are contingent on performance and deliverables submission.

Payment Administration

The Comptroller is committed to financial and procedural transparency and provides Texas taxpayers ready access to information on how their tax dollars are spent. CPA is accountable for ensuring tax dollars are spent responsibly. Expenses reimbursed under a CPA research contract must directly relate to the Contract research objectives, and must be justifiable, reasonable, and necessary for work under the Contract during the Contract term.

Payments are distributed as quarterly reimbursements for expenditures and will require itemized expenses accompanied by specific, appropriate documentation which will be reviewed in detail by CPA before payment. Reimbursement requests must adhere to Natural Resources Program Reimbursement and Invoice Preparation Guidelines located on the [Calls for Proposals web page](#). Potential respondents should review and consider the reimbursement requirement burden before submitting a proposal.

Confidential Data Requirements

Private landowner information is protected by the CPA and its contractors in compliance with Texas Government Code Section 403.454:

Information collected under this subchapter by an agency, or an entity acting on the agency's behalf, from a private landowner or other participant or potential participant in a habitat conservation plan, proposed habitat conservation plan, candidate conservation plan, or proposed candidate conservation plan is not subject to Chapter 552 (Public Information) and may not be disclosed to any person, including a state or federal agency, if the information relates to the specific location, species identification, or quantity of any animal or plant life for which a plan is under consideration or development or has been established under this subchapter. The agency may disclose information described by this section only to the person who provided the information unless the person consents in writing to full or specified partial disclosure of the information.

Data Repository

Shareable data generated from a CPA Contract must be uploaded to a CPA-approved, publicly accessible data repository before contract close. The Contractor is responsible for appropriate data review prior to upload to ensure compliance with confidentiality code. Restricted access to the data repository (*e.g.*, access for state and federal agencies) is allowable for a limited timeframe to allow for academic publications. However, the contractor must make the data publicly available and searchable within a reasonable timeframe.

PART 1

Scope of Work

1.1 Species of Interest

Morrison Bumblebee *Bombus morrisoni*

Southern Plains Bumblebee *Bombus fraternus*

1.2 Geographic Area

State of Texas (refer to historical distribution)

1.3 Project Timeline

24 months

1.4 Maximum Budget per proposal

\$300,000

1.5 Research Goals

1. Address knowledge gaps for species of interest to inform voluntary conservation plans or efforts that will support science-based management decisions.
2. Inform ESA decisions including species status assessments, petition findings, proposed and final listings, critical habitat, or recovery activities.
3. Provide accessible data and methodologies to FWS or NMFS, TPWD, and other potential end-users including state, federal or local government, natural resource managers, river authorities, public utilities, environmental consultants, private landowners, and businesses.

1.6 Research Objectives

Suggested Tasks include:

1. Conduct surveys to determine species of interest distribution and population size; perform statistical and practical comparisons of survey methods.
2. Describe the environmental and temporal factors associated with the occurrence and abundance patterns of the species of interest.
3. Document floral resources associated with bumblebee foraging.
4. Perform DNA sequencing to further understand the species of interest genetic diversity, population structure and population size.

PART 2 PROPOSAL FORMAT

2.1 Respondent Identifying Information

2.1.1 Proposal Title Page

1. Proposal title
2. Responding university's full name
3. Responding university's principal offices address
4. Principal Investigator (PI) name and co-PI names (including subcontractors) and affiliations

2.1.2 Key Contact Page: Provide name, title, email address, and phone numbers for primary contacts including:

1. PI and co-PIs
2. Administrative/financial

2.1.3 Personnel Summaries: Abridged curriculum vitae for principal investigators and key personnel, including subcontractors. Limit 1-2 pages per person.

1. Project role
2. List of accessible publications most closely related to the proposed research
3. Description of knowledge and experience:
 - a. conducting research on the species of interest
 - b. working with state and federal wildlife agencies
 - c. with their particular duties in the project

2.2 Project Description

Organize proposed project description by section, as shown below. Page limits for each section are maximum numbers, not suggested numbers.

2.2.1 Project Summary: Limit one page. Provide a summary/abstract of the proposed project.

2.2.2 Background Information: Limit 4 pages. Include the following:

1. summary of existing scientific literature and data on the species of interest throughout its entire historic range.
2. current regulatory status of focal species in Texas.
3. description of how deliverables from the proposed study would fill knowledge gaps to inform species status, management or recovery.

2.2.3 Research Tasks and Methods: No page limit. Include the following:

1. methods to address each Research Objective. Clarify alterations of Section 1.6 suggested tasks;
2. assumptions made in the proposed design;
3. description and high-level map of the areas within the species' Texas range that will be addressed by the project (*e.g.*, general areas where field work or other data collection will occur. Attachment B exemplifies the level of detail and information to display in the map);
4. description of permitting requirements to conduct the proposed work, existing permits meeting these requirements or plan to obtain such permits prior to commencement of work. (CPA must receive a valid permit copy before executing a contract for a selected proposal);

5. description of access to or plan to obtain permission to access publicly and/or privately owned property where necessary to perform research. Describe contingency plans if the desired access cannot be obtained;
6. description of expected challenges to the research and appropriate solutions to each challenge;
7. description of deliverables to CPA at the conclusion of the contract; and
8. proposed publicly accessible repository for project data, to be uploaded before contract close. If applicable, describe any restricted access/data embargo needs, and the maximum timeframe for data to become publicly accessible.

2.2 Project Management

2.2.1 Schedule of Work: Provide a schedule of work for each of the research tasks and deliverables described in this section using a format similar to the example below. Beginning and end Fiscal Years may include less than 12 months. Respondents may reformat the schedule with their preferred start date.

	FY 1				FY 2				FY 3			
	Contract execution - Aug. 31, 2024				Sept. 1, 2024 - Aug. 31, 2025				Sept. 1, 2025 - Contract expiration			
Task	Q ₁	Q ₂	Q ₃	Q ₄	Q ₁	Q ₂	Q ₃	Q ₄	Q ₁	Q ₂	Q ₃	Q ₄

Figure 1. Example format of quarterly work schedule by Fiscal Year

A Fiscal Year begins Sept 1 and ends the following August 31. Quarters are as follows:

- Q1: Sept. 1 – Nov. 30
- Q2: Dec. 1 – Feb. 29
- Q3: Mar. 1 – May 31
- Q4: June 1 – Aug. 31

The proposed schedule should address the following:

1. submission of Research Plan to Comptroller for review prior to commencement of work;
2. obtaining necessary scientific collection permits;
3. procurement of permissions necessary to access sites;
4. specific milestones for research tasks and project deliverables;
5. meeting with Comptroller (in person or virtual) prior to commencement of work;
6. quarterly progress meetings with Comptroller (email or virtual);
7. annual public presentation on research plans or progress (in person or virtual);
8. submission of annual and final reports to CPA, FWS, TPWD; and
9. submission of shareable project data to CPA-approved publicly accessible data repository prior to contract conclusion.

2.3 Confidential Data Management Plan

Provide a description of steps that will be taken to protect confidential information collected during this project (*e.g.*, training for research staff and students, encryption, controlled access).

2.4 Budget, Justification and Explanation

Attachment A details the proposal budget section. The budget should demonstrate an efficient use of project funds. Costs, including personnel and subcontractors, must be justifiable, reasonable, and necessary, and directly relate to the research objectives.

In the event Respondent is funded for other research projects related to the species of interest, Respondent must identify the funding source and percentage of salary, time, and other resources dedicated to the other project. Respondent must describe plans for leveraging the proposed funding such as collaborating with other researchers, institutions, and agencies to avoid duplication of effort and ensure funds are used efficiently.

Note: Expenses generally not eligible for reimbursement by the Comptroller are computers, software, vehicles, vehicle maintenance or repairs, journal publications, laundry services, registration or cancellation fees, out-of-state conferences or in-state conferences unless personnel are presenters. If requesting any of these items, include a detailed explanation of the item's value to the project.

Examples of other allowable and non-allowable expenses are listed in the CPA Natural Resources Program's Reimbursement Guidelines located on the [Calls for Proposals web page](#).

ATTACHMENT A Budget

The maximum budget per proposal is contingent upon the availability of legislated funds provided to the Comptroller for endangered species research.

Enter budget costs in the Project Budget spreadsheet posted on the Natural Resources Program [Calls for Proposals web page](#) (CPA-NR Project-Budget-By-Fiscal-Year). Green cells are fillable. In Attachment A to the proposal, include narratives for each Direct Cost category as noted below.

A.1 Contractual: Costs for services under contract with third parties. Proposals which subcontract a significant amount of work must include a detailed justification of why the work cannot be done in-house.

1. Excel “Contractual” tab: list each subcontractor name, contact information and cost per contract year.
2. Proposal narrative: Describe subcontractor work and include clarifying comments.

A.2 Personnel: All individuals receiving pay for work on project from project budget. Budgeted amounts should be based on and clearly describe the amount of effort each individual contributes to the project.

1. Excel “Personnel” tab: list names (if known), roles, compensation rates (including benefits and tuition), months dedicated to project per year, and cost per contract year.
2. Proposal narrative: include clarifying comments on personnel roles and justify any tuition requested.
 - A. CPA will consider tuition reimbursement only if a student’s thesis or dissertation research directly addresses project goals and the student works at least 20 hours/week on the project during the semester for which reimbursement is sought.

A.3 Travel: Lodging, transportation, and meal reimbursement in accordance with State of Texas travel guidelines. Meals are reimbursed for actual expenses. The Comptroller does not pay a per diem amount.

1. Excel “Travel” tab: list trip type and annual cost per trip type.
2. Proposal narrative: justification for conferences and other clarifying comments.

A.4 Supplies: Routine costs for items requiring replenishment throughout the project.

1. Excel “Supplies” tab: list supply type and cost per contract year.
2. Proposal narrative: include clarifying comments.

A.5 Equipment: Capital expenses for equipment costing over \$1,000 per item.

1. Excel “Equipment” tab: include name of item, make and model, and cost per contract year.
2. Proposal narrative: include item purpose, direct benefit to the project and other clarifying comments.

A.6 Indirect Costs: Indirect costs must be capped at ten percent (10%) of Direct Costs. A proposal will be disqualified if indirect costs are not capped at ten percent (10%). The Comptroller does not reimburse Contractor for indirect costs calculated on subcontractor-billed indirect costs

ATTACHMENT B

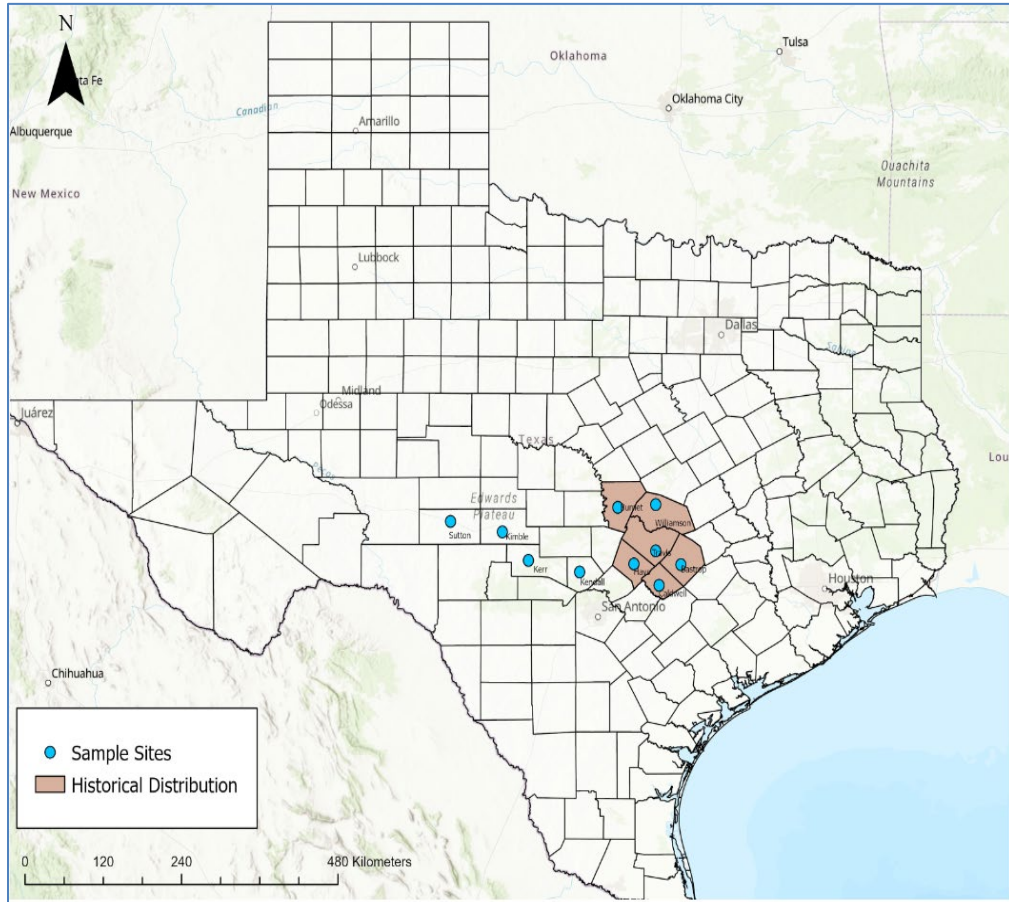


Figure 2. Example of map of species range and sampling sites