



# The Henry L. Ferguson Museum

## **Request For Proposals – Professional Services**

**Title:** Current Conditions Reports, Conservation Management Plans

**Proposal due date:** July 1, 2024

**Time frame:** All work must be completed by June 1, 2025.

### **Goal**

The Henry L Ferguson Museum and Land Trust is seeking a consultant to develop a set of conservation management plans (CMPs) for its fee properties and a set of Current Conditions Reports (CCRs) for its conservation easements. All plans and reports should follow the Land Trust Alliance’s specifications. The Land Trust is located on Fishers Island, NY, accessible from New London, CT.

### **Land Trust History and Resources**

Since its inception in 1960, the Henry L. Ferguson Museum (Museum) has worked to protect habitat for the flora and fauna of Fishers Island, New York, primarily through its Land Trust. While a few parcels were added in its early years, the Land Trust proactively started expanding in 1981. Today, the Museum conserves 69 separately deeded fee properties, nine distinct easements and one property under a management contract but owned by the Town of Southold. Properties that are contiguous - sharing boundaries - require one management plan that includes all of the properties within the cluster. When structured in this manner, the set of management plans would address ten clusters, seven easements and 33 single, non-contiguous parcels. This represents about 375 acres – about 14% of the Island.

Although professional biological surveys related to Museum properties date to 1993 and earlier, a focus on science-based conservation management of the land trust started in earnest in 2016, when the Museum hired two graduate students from the Yale School of Forestry and Environmental Studies. The two interns developed a plan for ten “sectors” encompassing 39 of our properties. This plan pulled together a lot of information, but the priorities did not reflect those of the Land Trust, which was a good lesson. This underscores the value of a collaborative planning process that includes the Land Trust Committee members and staff.

In 2021, the HLF Museum contracted with the NY Natural Heritage Program to survey all properties. Over the course of two years, the team of scientists produced a wall-to-wall ecological mapping and surveyed for rare plants, reptiles and amphibians, small mammals including bats and select insect taxa. In total, 64 ecological communities were identified on Land Trust properties, as well as a number of important and rare species. The final NYNHP report and extensive appendices were produced in 2023 and are available on the Museum’s website (<https://fergusonmuseum.org/2023/08/fishers-island-biodiversity-2023-report/>).

## **Scope of Work**

The role of the consultant will be to take the lead and manage the process to develop the needed CMPs and CCRs.

A major focus of this work will be to use the Museum's existing resources to (1) build consensus among the Land Trust committee members on specific management goals (2) develop a set of CMPs, following Land Trust Alliance (LTA) guidelines, (3) identify needed activities to achieve the goals.

Another focus will be to write the CCRs following LTA guidelines for the easements and obtain the required signatures. Within these two concurrent projects, the consultant should develop goals and protocols for an annual monitoring program to assess progress on the management plans and to meet annual requirements of conservation easements.

As such, we are seeking a consultant to:

1. Organize and convene Land Trust Committee meetings to reach consensus on management goals for each of the properties and contiguous reserves.
2. Building from agreed upon objectives and past studies, develop specific, detailed management plans for each of the Land Trust properties, including specific management goals, actions to achieve the goals and monitoring objectives.
3. Working with the landowners, write up legally defensible CCRs for each of the easements and acquire the necessary signatures.
4. Launch the design, development and necessary training of a quality-assured conservation monitoring and evaluation program, including data management and reporting systems using Landscape or comparable software.
5. Inform and educate Land Trust Committee members and volunteers on the resulting management plans and monitoring programs to build the stewardship and monitoring capacity of Land Trust Committee members and broader community members.
6. Make recommendations to the Museum's Board of Directors on implementing relevant policies and/or standards of practice, as put forth by the Land Trust Alliance

## **Deliverables**

By the end of this contract, the consultant will deliver the following:

- Approximately 43 management plans for our 69 fee properties, as some are contiguous and can be addressed together in the same plan, as described above. Ten plans, which will cover the contiguous reserves that are currently being actively managed, will be detailed in scope. Thirty-three of these plans can be more basic but meet minimal

requirements. All plans must meet basic requirements set out in the Land Trust Alliance's Standards of Practice.

- CCRs for the nine easements consistent the Land Trust Alliance's Standards of Practice.
- Set of tested monitoring protocols and a plan for sustainable annual monitoring using "Landscape" or comparable app approved by the Museum
- A training program for volunteers on monitoring protocols and software tools

### **Project Requirements and Timeline**

1. HLFM Museum is seeking proposals from applicants who can address all of the above stated management issues and who can provide additional expertise to help the organization achieve a successful project outcome.
2. While completing this project requires significant and active Land Trust Committee and staff involvement, the applicant selected will be responsible for completing all project work products and final deliverables. The staff and Board will not be involved in writing work projects products or final deliverables.
3. Applicants are to propose which aspects of the project will require Committee and/or staff involvement and include the expected time requirements for all activities involving their participation.
4. Proposals must include a clear description of the applicant's plan to complete all of the project components (i.e. in what order will the projects be completed, how long each component will take to complete, etc.), a proposed budget, and expectations regarding payments upon completion of each component of the plan.
5. Applicants must include in their project timelines "check-in" points for the Museum to be provided with project status updates. As work products/deliverables are completed prior to the established check-in points, applicants will be required to send the Museum these materials to facilitate the status update meetings and/or calls. The successful applicant will be fully responsible for setting up, preparing for and summarizing the check-in meetings and/or calls.
6. In addition to the check-in meetings and/or calls, the applicant will be expected to present a status update on his/her preliminary findings and recommendations prior to writing the final project deliverables and strategic plan.
7. Any modification to the Scope of Work, including any additional services to be performed or provided by the consultant shall require the prior written consent of the Museum and Consultant.
8. The consultant shall comply with all applicable laws and regulations and shall indemnify and hold the Museum harmless from and against any suit, claim, demand, action or liability for any damages.

Travel expenses and other expenses are paid by the consultant unless agreed to by the Museum and Consultant in advance.

### **Application**

Please provide a complete written response to this RFP. Proposals should include:

1. A brief Executive Summary
2. A description of the applicant's general approach to the development of conservation management plans.
3. Experience with Land Trusts and the Land Trust Alliance's standards and practices.
4. A clear explanation of how the consultant will address each of the project goals laid out in this RFP.
5. A list of project deliverables to be created with detailed timelines and budgets for each deliverable and overall project completion.
6. Credentials and qualifications of key personnel who will take responsibility for working directly on this project.
7. Three references, including contact information from previous clients.
8. Example(s) of a finished management plan created by your company.

Please submit an electronic copy of your proposal to [hlfmlandtrust@gmail.com](mailto:hlfmlandtrust@gmail.com) by July 1, 2024. Please note that the Museum will not return any proposals it receives nor reimburse applicants for any costs they incur in developing their proposals.