**Operational Tree Improvement Program**

**Technical Proposals**

**Call for Proposals 2021/2022**

**deadline for submissions: 11 March 2021**



**Forest Improvement and Research Management Branch**

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**Forest Genetics Council**

February 25, 2021

Dear Recipients:

This document is the *Call for Technical Proposals for the Operational Tree Improvement Program, 2021-22* issued by the Forest Improvement and Research Management Branch, Ministry of Forest, Lands, Natural Resource Operations and Rural Development.

This call has been prepared in accordance with the Government of British Columbia’s procurement policies and procedures, and in collaboration with the Forest Genetics Council of British Columbia (FGC) and its Coastal and Interior Technical Advisory Committees.

The overarching objective of this Call for Technical Proposals is to increase the quantity of high quality seed used for operational planting in British Columbia’s forests. Funding for this program will be provided under the Ministry’s Land Based Investment Strategy (LBIS).

***Please take note of these items relevant to the 2021-22 Call for Proposals:***

* + Technical projects now include proposals relating to pest management and research.
  + This year’s Call for Proposals is for Technical projects only, not operational projects.
  + Specific expertise may be added to assist in the review of technical proposals as required.
* Technical projects must be sponsored by an Orchard Manager who must sign off on the proposal.
* Project numbers will be assigned to proposals as they are received by the OTIP Coordinators. Project numbers from previous years will not apply.
* ***Please note that proposal documents (application form and budget form) must be submitted in their original Word/Excel formats.***

The **submission deadline for proposals this year is Thursday, March 11, 2021 at 4:00 pm** and all proposals are to be sent to [TreeImprovement.Proposals@gov.bc.ca](mailto:TreeImprovement.Proposals@gov.bc.ca?subject=OTIP%20Call%20for%20Proposals%202018/19). Please refer to the application and budget forms for greater detail on the submission.

**Please be aware that final approval of all projects is subject to the availability of funding, and recommendations and priorities assigned to the proposal from the review committee and FGC.**

**The review will take place in March 2021. Work must not proceed until a Ministry signed contract is in place.**

If you have questions or require further information, please contact myself at **778 974-5623** or by e-mail at [TreeImprovement.Proposals@gov.bc.ca](mailto:TreeImprovement.Proposals@gov.bc.ca?subject=OTIP%20Call%20for%20Proposals%202018/19).

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Forest Improvement and Research Management Branch

Ministry of Forests, Lands, Natural Resource Operations and Rural Development

Table of Contents

[1. Introduction 3](#_Toc63853805)

[1.1. Important notes 3](#_Toc63853806)

[1.2. Restrictions 3](#_Toc63853807)

[2. Evaluation and Review 4](#_Toc63853808)

[2.1 Review Process 4](#_Toc63853809)

[2.2 Evaluation Criteria 4](#_Toc63853810)

[2.3 Disbursal of Funds and Financial Considerations 4](#_Toc63853811)

[3. Submission of Applications 5](#_Toc63853812)

[3.1 Instructions for Submission of Applications 5](#_Toc63853813)

[3.2 Timeline from Proposal Submission to Contract 5](#_Toc63853814)

[3.3 Reporting for technical support projects 5](#_Toc63853815)

[4. Guidelines for Completing the Budget Form (Excel file) 5](#_Toc63853816)

[5. Avoiding Difficulties 7](#_Toc63853817)

**6. Sample Application of a Technical Project ………………………………………………………………….8**

**Call for Proposals**

1. Introduction

This is a Call for Proposals for funding under the Forest Genetics Council of British Columbia's (FGC) Operational Tree Improvement Program (OTIP) for 2021-22. This program is funded by the Land Based Investment Strategy (LBIS) and administered by the Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD, henceforth “the Ministry”).

Proposals under this call will be received from any individual or organization with an interest in technical projects that are eligible under the guidelines set out in this document. This program is designed for technical support projects, including pest management studies, which fill information gaps that prevent or slow progress to FGC objectives, may be acceptable. Technical support projects must incorporate a rigorous experimental design that will allow objective analysis and interpretation of results. Project eligibility criteria are developed by the Forest Genetics Council’s Interior Technical Advisory Committee (ITAC) and Coastal Technical Advisory Committee (CTAC).

The Call for Proposals, Application forms, and Budget spreadsheets are available for download on the Ministry’s [Forest Improvement and Research Management Branch - OTIP website](https://www2.gov.bc.ca/gov/content/industry/forestry/managing-our-forest-resources/tree-seed/operational-tree-improvement/call-for-proposals). Additionally, the Ministry will post any addenda to the Call for Proposal package to this website.

* 1. Important notes

**Final approval of all projects is subject to the availability of funds. No work may proceed without a valid contract.**

The application this year is for technical programs **ONLY**. The budget spreadsheet posted on the OTIP website must be used by Proponents. This spreadsheet helps reviewers interpret requests and compare proposals.

Priority will be given to proposals that

* support FGC objectives set out in the FGC Strategic Plan for 2015-2020
* address **critical** technical needs
  1. Restrictions

The following restrictions apply to this Call for Proposals:

* The proposed project must be conducted in tree seed orchards located in B.C.
* Proponents must own or operate a tree seed orchard in B.C. or have an agreement with an owner or operator of a tree seed orchard in B.C. Proponents who do not own or manage a seed orchard must partner with or obtain an agreement or letter of support from an orchard owner or manager to conduct the project. The sponsoring orchard owner/manager must also sign the proponent’s OTIP application.
* Proposals for more than one fiscal year in duration will be considered on a year-to-year basis. **On-going multi-year projects that received approval last year must reapply** under this call **and** submit progress reports. On-going projects will be evaluated relative to other projects submitted under this call. Project approval last year does not guarantee funding for 2021-22.
* Funding is only recommended through an objective review process by a review committee set up by the Ministry in collaboration with FGC’s Interior and Coastal Technical Advisory Committees.
* Material produced must be intended for use on Crown lands within the timber harvest land base. Investments in all projects are intended to benefit the people of British Columbia and are not intended for personal or private gain.
* Use of pesticides must be done in accordance with federal and provincial regulations, including those prescribed by the Pesticide Management Regulatory Agency.

1. Evaluation and Review
   1. Review Process

A Review Committee will review, evaluate, score and rank projects received that meet application criteria. Review committee members will be selected by the chairs of the Interior Technical Advisory Committee and the Coastal Technical Advisory Committee of the Forest Genetics Council of BC in collaboration with the Ministry. In addition, technical experts may be invited to evaluate technical proposals.

**The Review Committee reserves the right to reject proposals that are unclear, do not have accurate budget tables, or provide ambiguous or conflicting information.**

* 1. Evaluation Criteria

Projects must demonstrate they will improve seed supply or genetic worth for an SPU or demonstrate how the projects will make a significant contribution to FGC objectives. Proposals will also be evaluated based on the Program Category for the SPU.

All projects will be evaluated and ranked based on the following categories and weights:

|  |  |  |
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| Evaluation Criteria | | |
| Cost effectiveness | 30% | The cost of producing the report on an overall cost basis. Where innovative approaches are being used, a description of the technique should be detailed in the *Procedure* and *Budget* sections of the application. |
| Impact and value of the product | 50% | Need, impact, and value to advancing overall FGC objectives for the technical project. How important is this project to overall long term success for a species or the overall program |
| Feasibility, or chance of success | 20% | Project feasibility and chance of success based on current practices knowledge, and available personnel and resources. |

* 1. Disbursal of Funds and Financial Considerations

Projects will be funded in consideration of the review committee’s rankings. Projects that fail to meet application criteria or are not considered by review committees to be worth support, will not be recommended for funding. Where available funds are inadequate to cover all worthwhile projects, committee rankings will be used to determine which projects are funded. Final recommendations regarding project funding rests with the Ministry. The Ministry reserves the right to recommend removal or partially fund projects based on total available funds

1. Submission of Applications
   1. Instructions for Submission of Applications

* An application form and guidelines for completing it are included with this Call for Proposals.
* The submission deadline is **Thursday, March 11, 2021 at 4:00 pm**. Completed proposal applications must be submitted electronically to [TreeImprovement.Proposals@gov.bc.ca](mailto:TreeImprovement.Proposals@gov.bc.ca?subject=OTIP%20Call%20for%20Proposals%202018/19).
* Proposals must consist of completed templates available on the [Forest Improvement and Research Management Branch - OTIP](http://www2.gov.bc.ca/gov/content/industry/forestry/managing-our-forest-resources/tree-seed/operational-tree-improvement/call-for-proposals?pl=mb-flnr-tree_seed) website, including
  1. OTIP Application Form 2021-22 (Word), and
  2. OTIP Budget Template 2021-22 (Excel)*.*
* **All proposal documents (application form and budget form) must be submitted in their original Word/Excel formats.**
  1. Timeline from Proposal Submission to Contract

Review of proposals will occur in March 2021. Proponents will be informed of their recommended approved projects and funding levels in mid-March 2021, subject to Forest Genetics Council’s budget deliberations, Ministry Chief Forester approval and LBIS allocations to the provincial Tree Improvement Program. Subject to these confirmations, contracts for approved projects will be prepared by the Ministry for distribution and signatures in late April 2021.

Notwithstanding any other provision in this call for proposals, the contract contemplated by this RFP and the financial obligations of the Ministry pursuant to that contract are subject to the availability of funds in accordance with the Financial Administration Act. WorkSafe BC and other insurance coverage such as comprehensive general liability may be required.

* 1. Reporting for technical support projects

Technical support projects for which the final product is a report must prepare a comprehensive final report. For multi-year projects, an annual report on progress achieved is required at year end, with a final report at the end of the final project year. Reports must outline the objectives, material and methods used, key results, and a discussion of the results. Focus must be on the operational applications of the work investigated.

Two **brief interim reports on progress are required for the periods ending June 30th and September 30th respectively**, and a final report is required for the fiscal year ending March 31st.

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1. Guidelines for Completing the Budget Form (Excel file)

***NOTE: It is the responsibility of the project leader to keep all pertinent financial records and receipts for a period of 7 years for possible audit purposes.***

**Salaries and benefits:**

Salaries should conform to standards common for the activity type (i.e. seed orchard work). The review committee(s) may reduce salary requests if they are too high. Claim only actual, direct salaries (i.e. the amount actually paid to an employee, not charge-out rates). Salary rates must correspond to base rate only and cannot include any bonus or pay-for-performance. Actual benefit costs of employees (e.g. employment insurance, Canada pension, medical, vacation pay to a maximum of three weeks per year, pro-rated yearly, etc.) will be considered eligible costs. Piece work payment is acceptable but must be described.

If a person working on the project is a full-time employee of the organisation, the funding requested should be calculated by dividing actual annual salary by 230 days, multiplied by the number of days the person worked on the project. **Please state the rates at which employees are paid.**

If the project requires hiring someone on contract, funding can be based on an hourly, daily, weekly, monthly, or unit rate. In cases where the project team hires out a contractor and / or a contractual employee, charge-out fees are eligible.

Applicants may apply for appropriate and reasonable costs for preparation of approved projects. This applies only where a consultant has been hired to prepare proposals or an in-house employee has been hired for the specific purpose of doing the project work. These costs should be listed in the *Other* category.

**Equipment:**

Only equipment that is directly related to performing the proposed project and costs less than $1,000 is eligible for funding.

The acquisition of capital equipment is ineligible for funding under this program. Equipment needed may be leased. The value or depreciation costs of existing equipment or facilities may not be claimed. Similarly, proponents may not charge lease or rental fees for equipment owned by them that are used in projects.

All proposed expenditures in this category must be itemized separately.

**Pandemic Awareness:**

Please provide any details that might be pertinent on any special actions or considerations that you will need to take this year as a result of COVID-19 restrictions and guidelines. If there are additional costs involved, please advise of these as well by adding a line item and description to the budget form.

**Travel:**

Only expenses for work travel that is directly related to technical aspects of an approved project are acceptable. Total travel charges should be itemized showing purpose, destination and costs. British Columbia provincial government rates will be considered maximal. Allowable travel expenses are based upon the Ministry of Finance’s travel policies and procedures, and rates specified for public service employees:

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/goods-and-services-catalogue/employee-travel>

1. **Transportation**

The most economical method of transportation should be utilized wherever possible.

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| **Automobile** | Mileage rates, all vehicles: $0.57/km |
| **Air** | Economy class. Airfare receipts and tickets should be retained. Project personnel wishing to fly business or first class are responsible for any additional costs for upgrading. |
| **Ferry** | Receipts should be retained |
| **Taxi** | The use of taxis should be kept to a minimum. Retain receipts. |

1. **Accommodation and meals**

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| **Hotel** | The maximum allowable nightly rates for accommodations (before taxes) must be reasonable and not normally exceed the posted government rates for business travel for a specified destination and date. Retain receipts. <http://csa.pss.gov.bc.ca/businesstravel> |
| **Private  Lodging** | In situations where private lodging is arranged, the daily maximum stipend that can be claimed is $30. |
| **Meals** | The allowable claims for meals are:   * Breakfast: $13.00 * Lunch: $14.00 * Dinner: $25.00   Receipts should be retained for audit; but should not be submitted with expense reports. |

**Materials and supplies**

Material and supplies used to carry out the proposed project may include raw materials, tools, and software. Expenditures in this category are eligible and must be itemized.

**Other expenses**

Include all contract costs and all other items**. List individual contracts**.

**Administrative and other costs**

Administrative costs for an approved project, to a maximum of five (5) per cent of total project costs are eligible. These are calculated automatically in the budget spreadsheet. The following guidelines and restrictions apply to administrative expenses:

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| **Conferences** | This program does not fund conference travel and related expenses unless specifically planned as part of the project’s extension component. |
| **Publications, reports  and memberships** | Subscriptions to scientific journals, books and other publications will not be considered, nor will membership fees to societies. However, costs incurred in preparing progress reports and for extension and publication of results (with acknowledgement of the Forest Genetics Council Operational Tree Improvement Program) may be included. Charges for journal reprints and large document reproduction are eligible project costs. |
| **Personnel hiring** | Costs for advertising, travel, or other expenses associated with hiring new personnel for projects are not eligible. |
| **Entertainment** | Costs for entertainment are not eligible. |
| **Marketing** | Costs for product marketing or commercialization are not eligible. |
| **Patent** | Costs for obtaining a patent are not eligible. |
| **Goods and Services  Tax (GST)** | Only net GST costs not eligible for rebate may be claimed as a project expense. |

1. Avoiding Difficulties

Remember that reviewers can only judge the application on the information provided. Evaluation will focus on impact and value. Review committees must evaluate many proposals, so please only include information that reviewers will need to evaluate the work. Reviewers understand orchard work and don’t need to be told what is obvious. Presenting key information in bullet form is useful. The following types of information are helpful:

* Key performance indicator by project category using only listed indicators.
* **How the project supports FGC objectives.**
* How the final product will be used.
* Specific activities.
* Where non-standard approaches are proposed, please explain.
* **If funding was provided for the same activity in a previous year, please provide information regarding success level.**
* For category 350 projects (technical support), please provide adequate detail to allow review committees to understand project objectives, application, and methods.

Sample Application for a Technical Project

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name of Applicant/Project Leader  Marilyn Wilson | | | | | | | | | | | | |
| Legal Name of Organization:  Wilson Technical Support  Mailing Address:  Marilyn Wilson  5900 Dumont Drive  Duncan, BC V9L 1L7  Telephone: 250-748-7530  Fax: 250-748-5667  E-Mail Address: Mwilson@shock.ca  Financial Officer: N.E. Persona | | | | | | | | | | | | |
| Name of Orchard Sponsor:  Mitch McDeere, Seed Orchard Manager, FIRM | | | | | | | | | | | | |
| Project Title:  Application of Douglas-fir (Fdc) seed production across climatically contrasting sites | | | | | | | | | | | | |
| Outline of Project: Project was initiated last year (2020-21)  Results from previous studies provide information on environmental conditions necessary for viable pollen and seed production. It is now appropriate to apply this knowledge into practice on a pilot scale operational level.  The project will be carried out at six climatically variable field sites. Selection of the project sites will be based on operational accessibility while targeting climatic conditions conducive to seed production.  The information from this project will assist in the decision if the establishment of coastal Douglas-fir seed orchards at favourable locations at low elevation is a viable option to access genetic gain from the breeding program. | | | | | | | | | | | | |
| Seed Planning Unit | | | Annual SPU seedling need (mm): | | Years seed GW > 75% of potential | Orchard information (list all orchards considered in this application | | | | | |
| Orch # | Avg. ramet age | | GW | Avg. ramet  ht. (m) | # ramets in orch. |
| Species  Fdc | Seed Zone  M | Elevation band  1100 -2000m |  | |  |  |  | |  |  |  |
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|  |  | |  |  |  |
| Project Duration:  3 years | | | Project year: Year 2  Previous Funds Approved: Year 1 15,000 | | | | | | | | |
| **Total Project Cost requested for FY 2021-22: $15,000**  **Overall Project cost: $45,000** | | | | | | | | | | | |
| **Anticipated future budget needs:** | | | | | | | | | | | |
| **FY 2022-23: $ 15,000** | | | | **FY 2023-24: $0** | | | | **FY 2024-25: $0** | | | |

**Project Description**

**Needs**

Seed orchards were established at low elevations with the idea that the influence of warmer climate will promote earlier and increased quality cone production.

To the contrary, seed orchards produced lower quantities of viable seed than wild stands.

Orchard establishment at higher elevation micro sites may be a viable and economically feasible option for seed production.

Information obtained from this project will assist in the decision if the establishment of Douglas-fir seed orchards at favourable locations at low elevation is a viable option to access genetic gain from the breeding program.

**Objectives**

To determine the effect of climatic site differences on Fdc operational seed production.

**Procedures**

Progress to date:

The project was initiated at six climatically variable field sites. The six sites differ from each other in mean annual temperature, mean annual precipitation, elevation, and distance from the fog cooling effect of the ocean. Each site was equipped with two electronic thermometers to collect temperature data. There are two replications per site. Each replication was thinned to approximately 100 trees/ha. There are a total of 200 test trees per site and 1,200 trees in total for the six sites. Larger trees were topped. These two treatments should help to mimic actual seed orchard conditions

Activities 2020\_21:

Survey and assess cone production and production efficiency for each site. Cones on selected trees will be protected with mesh bags. Cones will be collected from 10 clones on each of the six test sites. Bulk samples by site will be assessed for the total number of seed and the number of filled seed per cone. In addition, the number of filled seed per cone, seed germination capacity, and seed viability will be assessed according to ISTA protocols.

**Location**

Field locations in Jordan River, Mount Washington, Zeballos

**Output and Deliverables**

* Progress Report on surveys and assessments of cone production and production efficiency for each trial location

**Who will benefit from this work?**

* Coastal Douglas-fir seed orchards
* Support for Forest Genetics Council objectives

**Project Team**

Marilyn Wilson

5900 Dumont Drive

Duncan, BC V9L 1L7

Telephone: (250) 748-7530

Mitch McDeere, Seed Orchard Manager

Vancouver Island Seed Orchard

Forest Improvement & Research Management Branch

BC Ministry of Forests, Lands, Natural Resource Operations and Rural Development

Tel. (250) 749-6811

**Proponent’s Signature Block:**

Manager or person of authority; who may authorize implementation of the work. Provide name, title, signature and date.

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|  |  |  |  |  |  |
| **Name:** | **Marilyn Wilson** |  | **Title:** | **Lead Researcher** |  |
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|  |  |  |  |  |  |
| **Signature:** |  |  | **Date:** |  |  |
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**Sponsor’s Signature Block:**

Orchard Manager who can attest to the value of the proposed project. Provide name, title, signature and date.

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|  |  |  |  |  |  |
| **Name:** | **Mitch McDeere** |  | **Title:** | **Orchard Manager** |  |
|  |  |  |  |
|  |  |  |  |  |  |
| **Signature:** |  |  | **Date:** |  |  |
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