

**Business Plan and Technical Assistance in Support of a
Proposed Marine Research and Education Center
Salt River Bay National Historical Park and Ecological Preserve
St. Croix, Virgin Islands**

GENERAL DESCRIPTION OF WORK

The general purpose of this project is to support the *Joint Institute for Caribbean Marine Studies* (the Consortium) as it builds its capacity to become a full partner in the development of a *Proposed Marine Research and Education Center* (MREC) at Salt River Bay National Historical Park and Ecological Preserve at St. Croix, Virgin Islands.

Primary responsibilities for the contractor, Environmental Resources Management (ERM), include:

- Developing a *business plan* that defines the MREC's proposed research and education programs and a summary of building and site space needs required for these programs, identifies potential partners and uses at the facility and their general space needs at the site, and provides input and guidance for the National Park Service and Department of the Interior on these building and site requirements as they develop *design concepts* for the MREC
- Researching comparable marine research facilities as input to the business plan, to identify education and research program models in use, as well as the private organizations and foundations that provide funding for these facilities
- Facilitating discussion among Consortium members to determine a preferred research and education program model, identify roles for each member within this model, and determine whether the Consortium needs additional members to be a full partner in the development and operation of the MREC
- Integrating the *business plan* with the *design concepts* to create a marketing plan, package, and message to take to potential funders as the Consortium solicits resources to build and operate the MREC
- Assisting the Consortium as it coordinates with the National Park Service, Department of the Interior and other partners throughout the development of the business plan

To facilitate the completion of the business plan and leverage the Consortium's limited resources, ERM will coordinate with the Consortium to establish an informal *Technical Advisory Committee* of marine researchers and resource persons who would assist the effort. These persons include researchers at the former West Indies Lab on St. Croix as well as others who have expressed interest in moving the project forward. These persons would provide input and direction about comparable facilities, research and education programs, potential funders and other technical details.

The following text provides background information and a detailed overview of the scope of work (SOW) for this effort.

PROJECT BACKGROUND

Salt River Bay National Historical Park and Ecological Preserve

Salt River National Historical Park and Ecological Preserve (SARI) was established by Congress on February 24, 1992 as part of the National Park System to preserve, protect, and tell the story of its rich contributions to the nation's natural and cultural heritage. The National Park Service (NPS) and the Government of the Virgin Islands (GVI) jointly manage the 1,015-acre park. The area blends sea and land and holds some of the largest remaining mangrove forests in the Virgin Islands, as well as coral reefs and a submarine canyon.

Since SARI was created in 1992, the NPS and the territorial government have worked in partnership to protect these resources.

- In 1994, the Salt River Bay Commission recommended approval of a Land Protection Plan, which was signed by the Governor of the Virgin Islands and the Director of the NPS in 1995. This plan set the priorities for the purchase of lands within the boundary of SARI.
- In May 2004, a planning team consisting of SARI staff and members of the Consortium met to examine possible site locations and discuss facility requirements.
- In November 2004, the Consortium completed a Twenty Year Plan further defining the proposed MREC's facility requirements and preferred site locations.
- In 2006, a Feasibility Study was completed to examine potential site locations for the MREC. A site on the east side of Salt River Bay was selected through a Choosing by Advantages process facilitated by Michael Bayer of ERM. Since 2006, an environmental assessment of the site has been drafted, and engineering and survey work and some additional site reconnaissance have been scoped and completed.

With the completion of the environmental assessment, the National Park Service and Department of the Interior are moving forward on the development on design concepts for the MREC. For these concepts to be useful, they require specific input from the Consortium relative to the MREC's building and site needs. The scope of work described here is intended to develop, refine and communicate that input.

SPECIFIC TASKS

Specific tasks for this project are as follows:

Task 1: Develop a business plan

This task is specifically related to the development and drafting of the business plan. ERM will work closely with the Consortium and its chairman, Bob Wicklund, to develop the business plan. We will use as a starting point the *Twenty Year Plan for the Salt River Bay Science and Education Center* and guidelines for the MREC developed by the Consortium, as the 20-year plan specified some early action items and a general timeframe for the development and operation of the facility.

The plan would discuss in detail:

- the *background and context* of the Marine Research and Education Center, including a mission statement, the purpose of the center, an overview of the planning process and an outline of the plan;
- *governance and management issues*, including how the center would be administered (through a non-governmental organization or similar structure, board of trustees, or the like), its education and research program components and likely staff makeup;
- *attributes and marketing issues*, including its purpose and position relative to other marine labs, an overview of revenue generating business lines and discussion of potential partners and their roles in the facility;
- *financial issues*, including the center's operating principle, anticipated revenue streams, and fiscal control issues;
- *marketing issues*, including an overview of potential operating partnerships and funding of operations, and a move-forward strategy to market the center; and
- *implementation*, including an overview of the development process and role of the Consortium in moving the project forward and discussion of facility planning and design considerations.

Task 2: Research comparable marine research facilities as input into the plan

To support the plan's development, we would research comparable marine facilities in the Caribbean and the United States to identify and briefly summarize comparable research and education programs, facilities, their niche relative to other marine labs, and the organizations that have provided funding for construction and/or operations. This information will be very useful as we develop the program models and marketing plan.

Members of the *Technical Advisory Committee* may assist in this task by suggesting possible contacts and/or providing information about facilities and/or potential funders.

Task 3: Facilitate discussion among Consortium members and other partners

This task refers to the need to coordinate and facilitate discussion among the Consortium and between the Consortium and its partners.

We envision four meetings throughout this process:

- An initial *gathering and brainstorming session* with the Consortium, to be scheduled as soon as it is feasible, to discuss the program components, key elements of the plan (including roles for each partner), organizational, governance and management issues, and to provide an opportunity for Consortium members to provide initial input into the plan.
- Following this meeting, in November 2008 if possible, we propose to schedule a *meeting in St. Croix* with the key stakeholders of the project, including National Park Service, Department of the Interior's Office of Insular Affairs, Government of the Virgin Islands and others to be determined in concert with these entities, to discuss the development process, define a critical path for the project, identify a preliminary project schedule, and discuss how to coordinate the activities of the Consortium with the other partners as well as how to integrate the business plan into the design concepts.

On this trip, we propose to schedule a *separate meeting with potential local partners*, including GVI, the University of the Virgin Islands, local environmental and/or educational groups, and economic development representatives. The goal of this meeting would be to identify potential partners and the role these partners might play at the site or within a facility that integrated their functions and involvement.

- When a *draft* of the business plan is completed, we would *convene the Consortium* to review the document and proposed action steps to determine if changes are needed and to identify short- and long-term actions that each member would contribute to and begin to work on.
- When the *final* business plan is completed, we would schedule a *second meeting with the stakeholder group* in St. Croix to review the outcomes and integrate the plan with the actions to be undertaken by all parties. By then, preliminary design concepts may be available, and/or the meeting could be combined with a scoping or

input meeting with the firm developing the design concepts to assure that all aspects of the plan and concepts are being coordinated.

Task 4: Integrate the business plan with the design concepts to implement the marketing plan

Following the completion of the business plan and the design concepts, we would work with the Consortium to create a package to take to funders that would include both products (business plan and concepts). Based on the marketing issues identified in the business plan and the research into comparable facilities and potential funders, we would develop a marketing plan for the Consortium that would include a message and talking points.

Some exhibits and glossy materials could be developed, if needed, to assist this effort, depending on the products that are developed as part of the design concepts. We would determine the need for these materials after the fourth meeting discussed in Task 3.

Task 5: Assist the Consortium as it coordinates with the National Park Service, Department of the Interior and other partners

The success of the business plan will depend on the coordination among all partners after these products have been completed. Therefore, ERM would provide technical assistance at the end of the business plan scope of work, to identify action items for the Consortium relative to the development process and the critical path for the project discussed in Task 3.

DELIVERABLES AND SCHEDULE

Deliverables

ERM will perform all work set forth in this Scope of Work to produce, in a professional manner, a business plan as defined above. Not all tasks specified in this Scope of Work require a deliverable product for completion.

The business plan will be submitted in electronic as well as hard copy formats unless otherwise specified. Copies of all electronic data including text, images, and document layouts will be provided to the Consortium in both their native programs and in .pdf format.

Printing of the final business plan document and related materials (see Task 4) will be discussed with the Consortium once it is completed.

Schedule

Upon receipt of a signed contract or Notice to Proceed, ERM will proceed on the project work as defined above. It is anticipated that the work of this Scope of Work would be completed six months after notice to proceed, or by March 31, 2009 if the project begins by October 1, 2008.

The actual schedule could be affected by the schedule developed for the design concepts work. Given the value of coordinating these two projects, we will take every step possible to coordinate and integrate the schedule and delivery of the final business plan and draft documents with the development of the design concepts. We anticipate that the meetings in Task 3 will help to define this overall schedule.

A precise date for delivery of the draft and final documents will be coordinated by ERM and the Consortium as more project information is collected. Informal reviews, exchange of ideas, and oral comments between ERM and the Consortium may occur on an as-needed basis.