

REQUEST FOR STATEMENT OF QUALIFICATIONS

Request for Project Support/Administrative Assistance Services for San Francisco Estuary Partnership's Integrated Regional Water Management (IRWM) Program

The San Francisco Estuary Partnership (SFEP), a program of the Association of Bay Area Governments (ABAG), a joint powers agency formed under California Government Code Sections 6500 et. seq., invites qualified applicants to respond to this Request for Qualifications (RFQ) for project support/administrative services for its IRWM program.

The amount of the proposed contract is not-to-exceed \$100,000 per year for up to 4 years. Funds for this contract will come from ABAG contracts with the Department of Water Resources (DWR), and the selected consultant will need to comply with all contract terms and conditions for DWR's IRWM Program. SFEP will act as project manager for the contract.

I. BACKGROUND

The purpose of this RFQ is to retain one qualified consultant team to assist SFEP/ABAG with administrative and project support responsibilities for its Integrated Regional Water Management Implementation Program. SFEP/ABAG is the grant manager for more than twenty-five projects under Proposition 84 IRWM Implementation Grant Rounds issued in 2013 and 2014. Duties to be performed by the consultant may include: reviewing project reports and invoices for completeness, consistency, and accuracy (typically on a quarterly schedule); compiling and organizing large files (deliverables, photos, etc.); confirming required deliverables have been submitted; tracking receipts and submittals to the funding agency; creating and/or updating reporting and/or invoice forms; other administrative and projectsupport tasks as needed.

II. SERVICES REQUIRED

The services required for this Project are identified in Appendix A, Scope of Services, to this RFQ.

III. TIME FRAME

Services are anticipated to begin with negotiation of a contract following the advertising period, or about 30 days from the submittal of qualifications deadline and are anticipated to extend until December 2019.

IV. COMPENSATION

Compensation will be on a per hour basis. Consultant must be a bona-fide independent consultant (or team of consultants). Consultant is responsible for payment of applicable state and federal taxes. Services will be paid for on a quarterly basis. All payments will be based on completion of contract tasks. All payments will be in arrears and consultant should be advised that the payment process has been subject to delays based on slowdowns at the State which ABAG does not have the power to change.

V. RFQ EVALUATION AND SELECTION CRITERIA

Every Statement of Qualifications (SOQ) will be evaluated according to the criteria below. Numerical scores will be tabulated for each offer.

1) Relevant Qualifications and Experience (45 points) - The Consultant will be evaluated based on project management, support, and oversight experience and on past performance on similar projects. Experience must demonstrate ability to coordinate many project partners, manage numerous files, maintain detailed tracking systems, identify problems with partner submittals and resolve them promptly, and adhere to project schedules, deadlines and budgets. Accuracy and attention to detail should be demonstrated in the response to this RFQ.

2) Education and Professional Background (20 points) - The Consultant team will be evaluated based on professional qualifications and education, credentials, and professional associations sufficient to demonstrate a high level of relevant expertise. Resumes of key staff should be included. Staff availability for work on this project should be described. Work flow will be time sensitive, with periods of high demand followed by slower periods within each quarter.

3) Statement of Project Approach (35 points) - The Consultant will be evaluated based on the adequacy of the material submitted in response to the services required as described in this Statement of Qualifications (SOQ). Consultant must demonstrate understanding of the project and tasks to be performed, project approach, and schedule.

Statements must respond to all the requirements of this request, and must include all information specifically required in all sections of this request. These responses, along with results of reference checks will determine if consultant qualifies for award.

A Selection Committee will evaluate the proposals. ABAG/SFEP will evaluate the proposals in accordance with the criteria 1 through 3 above. The top two firms evaluated as most qualified to perform the required services will be selected for an interview at SFEP offices, 1515 Clay Street, Suite 1400, Oakland, CA, at their own expense. Based on the interview, the Selection Committee will evaluate and rank those selected firms according to criteria outlined in this RFQ.

ABAG/SFEP will negotiate with the highest ranked firm. If ABAG/SFEP is unable to negotiate a satisfactory agreement with the top-ranked firm, ABAG will negotiate with the other firm interviewed, or interview additional firms until it has reached a satisfactory contractual agreement with a firm.

ABAG reserves the right to award a contract with, or to reject, all Proposals.

VI. SUBMISSION SCHEDULE

Interested firms must submit their SOQ electronically by August 15, 2015, 5:00 p.m. Proposals received after that date and time will not be considered.

VII. Contract Award

Contract award will be made with the most responsive Consultant on the basis of the evaluation criteria listed above and on the statement most advantageous to ABAG. Our objective is to obtain the highest qualified Consultant to achieve the objectives within a realistic

time frame and reasonable cost. Qualifications and experience as a whole are more important than cost.

This request does not commit ABAG to award a contract. We reserve the right to reject any or all SOQs received in response to this request. Award of contract may not be made to any Consultant unless an agreement can be secured for all general and special contract provisions. Award will not be made to a Consultant whose proposed period of performance is not within a period of time acceptable to ABAG. Applicants are informed that the award of any contract as the result of this solicitation is contingent upon the availability of funds.

VIII. What to Submit

To provide an objective, fair review of candidate submittals, statements are to include only the following information:

- 1) Transmittal Letter - covering highlights and unique features of your statement. Any special terms and conditions of the offer should also be summarized here. Letter should include the name and telephone number of a contact person and your office address.
- 2) Statement of Qualifications (SOQ) - providing a definitive statement that responds to the requirements of this request. The SOQ must describe in detail the procedures and methods that will be used to provide the services requested. Proponent should describe experience working with diverse agencies on complicated projects with quick turn-around times and deadlines. Proponents should describe any current or anticipated conflicts of interest that may interfere with the ability to provide objective services to ABAG/SFEP.
- 3) Key Personnel - Identify principal(s) and subcontractor(s), and the key personnel and lead persons to be assigned to the project. Attach resumes describing the education and background of all personnel to be assigned to the project, and describe the recent and relevant working relationship of the subcontractor to the principal applicant.
- 4) List of Client References - Provide a list of client references, including contact name, address, telephone number, nature of job, length of engagement, amount (e.g. 1 year, \$50,000).
- 5) Budget - Provide a complete project budget (by task) including direct hours, billing rates, overhead and other indirect costs, other direct costs such as equipment, supplies, etc.
- 6) Examples of Work - Provide a list of other relevant projects completed in the last two years.

An electronic copy of the SOQ package must be submitted by email to Jennifer Krebs, Principal Environmental Planner (jkrebs@waterboards.ca.gov). **All proposals must be received by SFEP no later than at the close of business, August 15, 2015 at 5:00 P.M.** Questions may be directed to Jennifer Krebs, Principal Environmental Planner (jkrebs@waterboards.ca.gov; 510-622-2315).

APPENDIX A: SCOPE OF SERVICES

Task 1. Progress Report Form & Invoicing Form. Consultant will:

- 1.1 Review examples of past reports and develop reporting forms for recently awarded IRWM projects
- 1.2 Review examples of past invoices and develop invoicing forms for recently awarded IRWM projects

Task 2. Develop Communications and File Transfer Protocols. Consultant will:

- 2.1 Review examples of guidance materials for Local Project Sponsors and update these materials so as to streamline the reporting and invoicing procedures
- 2.2 Review current file transfer protocols and make recommendations as to how to upload, download and store files for maintenance for 10 or more years.
- 2.3 Assist Local Project Sponsors with Basecamp, Dropbox, and/or other communications platforms used to manage programs.

Task 3. Quarterly Report and Invoice Review. Consultant will:

- 3.1 Request submittals of reports by Local Project Sponsors by deadline dates
- 3.2 Review reports by Local Project Sponsors and communicate with them to ensure accuracy and completeness. A very high level of attention to detail is required.
- 3.3 Ensure all reports are uploaded and filed for use by ABAG
- 3.4 Ensure all reports are uploaded into DWR's Grant System.

Supervision

The consultant will work under the general direction of the SFEP's IRWM Program Manager; Principal Environmental Planner, Jennifer Krebs. The SFEP Manager will coordinate with project proponents and be advised by a small committee. The consultant shall submit monthly reports on progress and completion of deliverables as well as invoices of direct costs and direct cost expenditures to SFEP's Program Manager.