



REQUEST FOR PROPOSALS  
TO PROVIDE  
PROFESSIONAL ENVIRONMENTAL PERMITTING SERVICES  
FOR THE  
LUSARDI CREEK PIPELINE RESTORATION PROJECT  
PROPOSALS DUE:

December 6, 2018, 2:00 P.M.

**OLIVENHAIN MUNICIPAL WATER DISTRICT**

A handwritten signature in black ink that reads "George R. Briest". The signature is written in a cursive style and is positioned above a horizontal line.

George R. Briest, PE

Engineering Manager

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## **Olivenhain Municipal Water District**

### **LUSARDI CREEK PIPELINE RESTORATION PROJECT**

#### **Request for Proposals (RFP) – Environmental Permitting Services**

##### **1. INTRODUCTION**

The Olivenhain Municipal Water District (OMWD) owns and operates a 14-inch diameter cement-mortar lined and coated steel recycled water pipeline in the unincorporated area of the County of San Diego known as Extension 153 Lusardi Creek Pipeline. At approximately STA 205+00, the pipeline crosses Lusardi Creek in the Lusardi Creek Open Space Preserve. In the winter of 2016/2017, Lusardi Creek flooded and caused erosion damage that exposed approximately 40 feet of the pipeline. OMWD has prepared a design for the restoration of the damage and protection of the pipeline and now needs to acquire the necessary Federal, State, and Local permits, define conditions and requirements, conduct a public bidding process, and construct the restoration to protect the pipeline.

OMWD is requesting proposals from environmental firms to perform data collection, prepare necessary reports, prepare and submit applications, and obtain all required permits to perform the pipeline restoration as shown in the attached design as Exhibits A and B. The scope of work for this project is expected to include, any or all of, the following permits and regulatory agency approvals:

- a) California Environmental Quality Act (CEQA) Environmental Impact Report (EIR) or Notice of Exemption (NOE).
- b) California Department of Fish & Wildlife (CDFW) Consultation-California Endangered Species Act (CESA)
- c) Jurisdictional Habitat Delineation, Determining the High-Water Mark, and Wetland Delineation.
- d) United States Army Corps of Engineers (USACE) 404 Nationwide Permit (NWP)
- e) US Fish & Wildlife Service (USFW) Consultation
- f) State Water Resource Control Board (SWRCB) 401 Permit
- g) Wetlands Compensatory Mitigation
- h) California Department of Fish & Wildlife (CDFW) Consultation-Lake or Streambed Alteration Agreement
- i) County of San Diego Grading Permit
- j) Federal Emergency Management Agency (FEMA) Letter of Map Revision (LOMR)
- k) San Diego Regional Water Quality Control Board

- I) Storm Water Pollution Prevention Plan and a Notice of Intent filed with SMARTS

## 2. OLIVENHAIN MUNICIPAL WATER DISTRICT

OMWD serves approximately 84,000 people through approximately 22,000 potable water connections, (28,000 meters) in a 48 square-mile area that includes portions of the unincorporated County of San Diego, and the Cities of Carlsbad, Encinitas, Solana Beach, San Marcos, and San Diego. OMWD's mission statement is to serve present and future customers in a service-oriented manner by:

Water – Providing safe, reliable, high-quality drinking water while exceeding all regulatory requirements in a cost-effective and environmentally responsive manner.

Recycled Water/ Wastewater – Providing recycled water and wastewater treatment in the most cost-effective and environmentally responsive method.

Parks – Safely operating the Elfin Forest Recreational Reserve and providing users with a unique recreational, educational, and environmental experience.

Emergency Management – Complying with policies and procedures that adhere to local, state, and federal guidelines for national security and disaster preparedness.

Sustainable Operations – Pursuing alternatives and/or renewable resources with the most sustainable, efficient, and cost-effective approach.

## 3. BACKGROUND

Planning and design for this project was included in OMWD's Capital Improvement Program, within its FY19 budget.

## 4. OMWD PROJECT MANAGEMENT

The project will be managed by Chad Williams, the District's Engineering Services Supervisor.

## 5. SCOPE OF SERVICES

OMWD envisions the following scope of services but is open to suggestions and modifications to improve the project. Please identify any permits listed in Section 1 and Task P-3, below.

## **General Tasks**

The consultant is expected to complete the following general tasks throughout the project:

G-1. *Project Management*

Provide project management to achieve the project objectives and stay within budget and on schedule. Provide a weekly e-mail project status report. Notify OMWD immediately if any budget or schedule variances are expected.

G-2. *Quality Control/ Quality Assurance*

Prior to submitting any materials to OMWD or other agencies, provide QA/QC reviews in accordance with the Consultant's internal processes and procedures. The reviews will provide an independent check of the work. All submittals will indicate the name of the reviewer.

## **CEQA Documentation and Permitting**

P-1. *Review Proposed Design and Meet with District*

Review the two (2) proposed design alternatives that have been completed and meet with OMWD to confirm the information and the recommended approach.

P-2. California Environmental Quality Act (CEQA) Environmental Impact Report (EIR), MND, or Notice of Exemption (NOE).

Based on Task P-1, recommend to OMWD the appropriate CEQA compliance process and provide justification. Upon OMWD concurrence, prepare the documentation and complete all processing. The scope may include:

1. Prepare an Initial Study (IS) conforming with CEQA
2. Completion of a Notice of Preparation
3. Recommend Appropriate CEQA process
4. Prepare draft environmental documentation conforming with CEQA
5. Prepare and distribute documents for public review
6. Completion of notices required for CEQA
7. Prepare responses to comments
8. Prepare final environmental documentation and reporting program
9. Complete notices for District signature
10. Other tasks recommended by consultant.

P-3. Identify Environmental and Agency Permits

OMWD anticipates that multiple permits from multiple agencies may be required to construct the proposed design. The consultant shall review the proposed work and identify all environmental, agency and other permits required to construct the work along with permit fees and a timeline for obtaining these permits. Provide this information in a technical memorandum to OMWD. The scope of work for this task may include, but not be limited to, the following permits or regulatory agency approvals:

- California Department of Fish & Wildlife (CDFW) Consultation-California Endangered Species Act (CESA)
- Jurisdictional Habitat Delineation, Determining the High-Water Mark, and Wetland Delineation.
- United States Army Corps of Engineers (USACE) 404 Nationwide Permit (NWP)
- US Fish & Wildlife Service (USFW) Consultation
- State Water Resource Control Board (SWRCB) 401 Permit
- Wetlands Compensatory Mitigation
- California Department of Fish & Wildlife (CDFW) Consultation-Lake or Streambed Alteration Agreement
- County of San Diego Grading Permit
- Federal Emergency Management Agency (FEMA) Letter of Map Revision (LOMR)
- San Diego Regional Water Quality Control Board

P-4. Identify any Special Construction or Permit Areas

Identify any areas within the project that will require special construction techniques to comply with applicable permits.

P-5. Obtain Environmental and Agency Permits and Approvals

After review and approval by OMWD of the information provided in Task P2, P3, and P4, obtain all permits and approvals required to complete the work as designed on behalf of the District.

## 6. PROPOSED MODIFICATIONS TO THE SCOPE OF SERVICES

OMWD is interested in the consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposal.

## 7. OMWD FURNISHED SERVICES

The following information and services will be made available to the consultant by OMWD:

Arrange for meetings with its engineering and operations staff to gather information and review approaches, planning, and designs.

Furnish copies of record drawings, project reports and related materials. Any original materials provided by OMWD or developed by the Consultant during the duration of the project shall be returned to OMWD upon the completion of services.

Answer questions regarding the Project at any time during all phases of the work.

Make initial contact with customers and assist consultant with coordination.

## 8. SPECIAL CONSIDERATIONS

None.

## 9. PROPOSAL REQUIREMENTS

Written proposals are to include at a minimum a detailed discussion of the consultant's approach to the project including a breakdown and explanation of project tasks, an estimation of hours for individual tasks and sub-tasks by the consultant and any sub-consultant(s), and documentation of the consultant's and sub-consultant(s) qualifications for the Scope of Work. An estimation of hours with costs are to be provided with the proposal. The cost analysis shall include the identity, classification, and estimated hours for personnel and allowable direct costs.

The Proposal should be concise, well organized, and should demonstrate the responder's qualifications and experience that is related to the project. Responders will be evaluated based on the information submitted according to the following.

### Executive Summary

Include a short summary of the entire Proposal describing the highlights of the Proposal.

### Identification of Responder

- Legal name and address of company.
- Legal form of company (partnership, corporation, joint venture, etc.). If the company is a joint venture, identify the members of the joint venture and provide all information required under this section for each member. If company is a wholly owned subsidiary of a "parent company," identify the "parent company."
- Number of years that the company has maintained a local office.

- Number of employees in the office.
- Name, title, address, and telephone number of person to contact concerning the Proposal.
- Name, title, address, and telephone number of person who will sign the agreement if selected for the project.

### Experience

Describe the firm's experience in completing similar consulting efforts. List at least three (3) successfully completed similar projects, and include the following information about the client for each project: the client's name, project manager/contact person, and phone numbers. Also describe the type of work performed and value of the consulting contract. OMWD will consider consulting projects currently being performed.

### Proposed Approach to Accomplish the Work

Describe your approach to the scope of work. Identify project constraints. Describe any suggested enhancements to the scope and creative ideas for accomplishing the project objectives. Provide a schedule for completing the planning and design work considering your staff and current workload.

### Project Team, Project Organization, and Key Personnel

Provide an organization chart and proposed staffing plan, based upon the scope of work, and estimated project schedule, showing personnel by title, position, and name. Staff shown in the proposal will be assumed to be available for the duration of the contract.

Describe the specific qualifications and capabilities of the designated project manager and support staff. The proposal should identify all individuals who will perform and oversee work on this project. Indicate the role and responsibilities of the prime consultant and any/all sub-consultants. Key personnel assigned to the project shall not be reassigned without prior written approval from the District, and the consultant shall request approval of OMWD before any new personnel are assigned to the project. OMWD reserves the right to reject or remove personnel performing services in this contract in its sole discretion.

### Statement on Conflicts of Interest

The consultant shall submit a statement verifying that personal and organizational conflicts of interest prohibited by law do not exist, in conformance with OMWD's Standard Agreement for Professional Services (Exhibit "A"). Any documentation required by OMWD shall be submitted by the consultant and all sub-consultants.

The consultant shall provide as a separate appendix to their proposal (not part of the maximum 20 page count), any substantive comments related to their ability and willingness to sign the District's Standard Agreement for Professional



Services. Any significant or substantive comments brought forth by the selected consultant after the selection process is completed may be cause for rejection.

### Hours and Cost Proposal

A cost proposal shall be submitted with the Proposal which states a total fee, not-to-exceed upper limit for the work. Payment for professional services will be time and material based on: (1) actual base hourly labor rates, and (2) direct costs. The only direct costs allowed to be billed by the consultant and subconsultants are: mileage at the IRS rate, report printing, blueprinting, and postage. OMWD will not pay any markup for reproduction costs, subconsultant costs, or other direct costs. Costs for IT, MIS, computer usage, overhead resource charges, and similar related costs should be included in each individual labor rate. Separate charges or multipliers will not be considered by OMWD.

Provide an estimated cost analysis for the following items:

- Total fee for each task listed in the Scope of Work
- Labor (personnel classifications, estimated hours and hourly rates)
- Direct costs
- Subcontracts

Monthly invoices shall identify each person's actual hours on the project and must include a narrative of the work performed during the previous month. Supporting invoices for direct and subcontracted costs must be included with invoice. Provide an hourly rate schedule for each labor classification for the consultant and each subconsultant. Rate schedules shall specify an effective term and a maximum annual increase for time extending beyond the effective term. The rates may be used as the basis of payment for extra work that is outside the contract scope of services, but which is performed by the consultant after specifically requested in writing by the consultant and authorized in writing by the OMWD.

## 10. SUBMITTAL REQUIREMENTS

One (1) executed original, clearly marked on the cover, and five (5) additional copies of the Proposal shall be submitted together along with the proposal in electronic format (PDF) on disk or flash drive. The proposal shall not exceed twenty (20) pages in length, excluding front and back cover, dividers, resumes and organizational chart. Limit resumes to a maximum of two pages. The proposal shall be signed by an individual or individuals authorized to execute legal documents on behalf of the consultant. Proposals and/or modifications thereto received subsequent to the hour and date specified herein will not be considered.

**The Proposal must be received no later than 2:00 p.m. PST, on December 6, 2018** at the office of:

OLIVENHAIN MUNICIPAL WATER DISTRICT

ATTN: Chad Williams

Engineering Services Supervisor

1966 Olivenhain Road

Encinitas, CA 92024

## 11. PRE-SUBMITTAL ACTIVITIES

Questions concerning this Request for Proposals should be directed in writing by email to:

OLIVENHAIN MUNICIPAL WATER DISTRICT

ATTN: Chad Williams

Engineering Services Supervisor

1966 Olivenhain Road

Encinitas, CA 92024

[cwilliams@olivenhain.com](mailto:cwilliams@olivenhain.com)

No pre-proposal meeting is planned to be held regarding this RFP. Individual 30-minute technical meetings with consultant teams who are seriously competing for the project will be scheduled. The meetings are intended to answer questions and discuss ideas, which will be kept confidential. Do not discuss team qualifications at the meetings. The proposed consultant project manager and one key project team member may attend the meeting.

OMWD reserves the right to revise the RFP before the date that Proposals are due. Revisions to the RFP will be mailed or emailed to all potential proposers. OMWD reserves the right to extend the date by which the Proposals are due.

## 12. CONSULTANT NOMINATION AND SELECTION PROCESS

A Consultant Selection Panel (Panel) will be established for this project and will include representatives from OMWD, and if deemed in OMWD's best interests, other persons from outside OMWD qualified to evaluate the proposals. The Panel will evaluate the Proposals based on the information submitted.

OMWD anticipates selecting a consultant based on the proposals received, however, reserves the right to interview selected firms. OMWD will rank the finalists as to qualifications and select the successful consultant.

If necessary, OMWD will enter into negotiations with the selected firm. The scope of work provided in the proposal will be used as a basis for contract negotiations. Negotiations will cover: scope of work, contract terms and conditions, and price. If OMWD is unable to reach an acceptable agreement with the selected firm, OMWD will terminate negotiations with the selected firm and negotiations with the second ranked firm will be initiated.

After negotiating a proposed agreement that is fair and reasonable, the negotiating team will recommend to the General Manager that OMWD enter into the proposed agreement. The General Manager will make the final recommendation to the OMWD Board of Directors, concerning the proposed agreement. Final authority to approve the agreement rests with OMWD's Board of Directors. A contract is expected to be presented to the Board of Directors for consideration at their January 16, 2019 meeting.

### 13. EVALUATION CRITERIA

The Proposals will be evaluated based on the minimum following criteria. Other factors may be taken into account by OMWD during Proposal review.

#### 13.1 Approach to Work (35%)

- Understanding of project and objectives
- Responsiveness to issues identified in RFP
- Level of detail discussed
- Other issues not addressed in RFP but deemed essential to the effective conduct of the project
- Tasks clearly defined
- Activities well-coordinated
- Flexibility to changes in scope and schedule
- Provisions for technical and quality control

#### 13.2 Project Manager and Team Qualifications (40%)

- Specialized Qualifications of the Project Manager and Team
- Involvement and commitment of key personnel
- Ability to perform within schedule with assigned staff
- Current depth of technical expertise in firm

#### 13.3 Project Experience (25%)

- Experience and Performance on similar projects
- Proven specialization of the firm on similar projects

#### 14. SCHEDULE FOR NOMINATION, SELECTION, AND AWARD

OMWD anticipates that the process for nominating and selecting a consultant, and awarding the contract, will be according to the following tentative schedule:

- |                                       |                   |
|---------------------------------------|-------------------|
| • Issue RFP                           | November 6, 2018  |
| • Proposals Due                       | December 6, 2018  |
| • Notification of Selection           | December 20, 2018 |
| • Completion of Contract Negotiations | December 31, 2018 |
| • Board Memorandum Due                | January 02, 2019  |
| • Consideration of Board Award        | January 16, 2019  |
| • Anticipated Notice to Proceed       | January 17, 2019  |

#### 15. SPECIAL CONDITIONS

This RFP does not commit OMWD to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work.

All proposals submitted in response to this RFP become the property of OMWD and are public records, and as such may be subject to public review.

OMWD reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to selection schedule, submittal date, and submittal requirements. OMWD reserves the right to reject all proposals and terminate the project. If OMWD cancels or revises the RFP, rejects all Proposals or terminates the project, all proposers will be notified in writing by OMWD.

OMWD reserves the right to request additional information and/or clarifications from any or all proposers to this RFP.

The selected consultant will be required to sign an Agreement for Professional Services (Exhibit C) and to provide the Insurance Certificates and all other required documentation within ten (10) calendar days of notification of selection.

**Proposals are due December 6, 2018 at 2:00 pm.**