



REQUEST FOR PROPOSALS

TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

FOR THE CONSTRUCTION OF THE

PROGRAMMABLE LOGIC CONTROLLER (PLC) REPLACEMENT PROJECT

OMWD PROJECTS
D120091 (POTABLE AND RECYCLED SITES)
AND D700036 (WASTEWATER SITES)

PROPOSALS DUE:
September 14, 2023, 2:00 P.M.

OLIVENHAIN MUNICIPAL WATER DISTRICT

A handwritten signature in black ink, appearing to read "LARS", is written above a horizontal line.

Lindsey Stephenson, PE
August 10, 2023
Engineering Manager

TABLE OF CONTENTS

SECTION

- 1.0 INTRODUCTION
- 2.0 OLIVENHAIN MUNICIPAL WATER DISTRICT (OMWD)
- 3.0 BACKGROUND
- 4.0 OMWD PROJECT MANAGEMENT
- 5.0 SCOPE OF SERVICES
- 6.0 PROPOSED MODIFICATIONS TO THE SCOPE OF SERVICES
- 7.0 OMWD FURNISHED SERVICES TO SELECTED CM
- 8.0 SPECIAL CONSIDERATIONS
- 9.0 PROPOSAL REQUIREMENTS
- 10.0 SUBMITTAL REQUIREMENTS
- 11.0 PRE-SUBMITTAL ACTIVITIES
- 12.0 CONSULTANT NOMINATION AND SELECTION PROCESS
- 13.0 EVALUATION CRITERIA
- 14.0 SCHEDULE FOR NOMINATION, SELECTION, AND AWARD
- 15.0 SPECIAL CONDITIONS

REQUEST FOR PROPOSALS
TO PROVIDE
CONSTRUCTION MANAGEMENT SUPPORT SERVICES
FOR CONSTRUCTION OF THE

PROGRAMMABLE LOGIC CONTROLLER (PLC) REPLACEMENT PROJECT

1.0 INTRODUCTION

The Olivenhain Municipal Water District (District) is requesting proposals from firms with qualified staff and experience in construction management (CM) and inspection services for Programmable Logic Controllers (PLC) replacements, for the **PLC Replacement Project (Project)**.

Construction management services are necessary to provide documentation of the contractor's compliance with the contract documents during construction and to assist District staff during the administration of the contract.

This Request for Proposals (RFP) describes the project, the required scope of services, the consultant selection process, and the minimum information to that must be included in the Proposal. Failure to submit information in accordance with the RFP requirements and procedures may be cause for disqualification. The District reserves the right to waive minor proposal deviations or omissions at its sole discretion. It is important to the District that consultants have an established local office. It is the District's intent to select the CM team ahead of the construction award, and then to award CM effort for the Project with the construction award.

2.0 OLIVENHAIN MUNICIPAL WATER DISTRICT

The District serves approximately 86,000 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, and San Diego. The District'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.

3.0 BACKGROUND

PLC Replacement Project

OMWD is seeking to replace approximately 45 “end of life” Allen Bradley SLC 5/05 and MicroLogix PLC’s with ControlLogix compatible devices. The work is to be performed at the David C McCollom Water Treatment Plant (DCMWTP), 4S Water Reclamation Facility (4SWRF), and 34 remote sites. The Project will include hardware replacement, PLC programming, and SCADA development at the following sites. Each site will be tested and commissioned separately:

1.1 Phase 1 – Remote Sites

- 1a. Upgrade and replacement of 1746 SLC PLC with 5069 CompactLogix at other Remote Wastewater handling sites throughout the District, including:

- (4S-103) - Avenida Apice SPS
- (4S-105) - Cerro Del Sol 1 SPS #1
- (4S-106) - Cerro Del Sol 2 SPS #2
- (4S-107) - Camino Sin Puente SPS #1
- (4S-108) - Camino Sin Puente SPS #2
- (4S-109) - Camino Sin Puente SPS #3
- (4S-110) - Camino Sin Puente SPS #4
- (4S-111) - Del Dios SPS
- (4S-113) - Fire Station SPS
- (4S-114) - Midpoint SPS
- (4S-115) - Neighborhood 3 SPS
- (4S-120) - Santaluz SPS
- (4S-121) - Avenida Orilla SPS

- 1b. Upgrade and replacement of 1746 SLC PLC with 5069 CompactLogix at other Remote Water Distribution sites throughout the District, including:

- (D-001) - 520 PRS / Flow Control
- (D-002) - 4S-1 Reservoir - (inclusive of full backpanel replacement)
- (D-003) - Connemara PS
- (D-004) - Cielo PS
- (D-005) - Crosby 3 and 4 PRS
- (D-007) - Gano Reservoir
- (D-008) - Gaty Reservoir
- (D-009) - Oak South #1 PRS
- (D-010) - Miler Reservoir / Hydro
- (D-011) - Oak South #3
- (D-012) - Peay Reservoir / Flow Control)
- (D-013) - Santa Fe Valley PS
- (D-014) - Unit M Flow Control
- (D-015) - Unit Z Pump Station
- (D-016) - Via De Las Flores PRS
- (D-017) - Village Park Recycled PS
- (D-018) - Zorro Reservoir

2.1 Phase 2 – DCMWTP Treatment and 4S WRF Reclamation Facilities

2a. 4S Water Reclamation Facility (4S WRF)

1) Upgrade and replacement of 1746 SLC PLCs with 5069 CompactLogix, including:

- (4S-101) - Headworks Odor Control
- (4S-102) - Solids Processing Odor Control
- (4S-104) - Blower Control
- (4S-116) - PLC-2A
- (4S-117) - PLC-2B
- (4S-118) - Reclaimed Water Pump Station
- (4S-119) - Pond System Reservoir/ Pump Station

2) Upgrade and replacement of 1746 SLC PLC with 1756 ControlLogix, including:

- (4S-112) - Filters PLC

2b. David C McCollom Water Treatment Plant (DCMWTP)

- 1) (M-204 and M-205) - Upgrade and replacement of 1746 SLC ICP2 & 3 and integrate as ethernet Remote IO to CCMBR Remote as 1756 ControlLogix
- 2) (M-206) - Upgrade and replacement of One (1) Ammonia Feed Facility PLC from 1746 SLC to 1756 ControlLogix

August 10, 2023

- 3) (M-201 thru M-203) - Sub-contract upgrade and replacement of ERT 1746 SLC PLC's and Remote IO's to OEM Canyon Hydro.

The Project is currently at 100% design milestone, and Issued for Bid contract documents will be issued when the Project is advertised for bid.

An approximate schedule of the major milestones for construction of the Project includes:

Advertise Construction Contract	August 2023
Open Bids	September 2023
Award Project	October 2023
Begin Construction	December 2023/January 2024
Construction Duration	2 Years

Construction for this project was included in the District's Capital Improvement Program, within its FY 24 budget.

4.0 OMWD PROJECT MANAGEMENT

The Project will be managed by a member of the Engineering Department, with substantial involvement from Operations.

5.0 SCOPE OF SERVICES

The Construction Manager (CM) shall provide construction management and inspection services for the Project. The CM will ensure that the Project is constructed per the plans and specifications, constructed on time and budget, facilitate communication and coordination between the Contractor and OMWD Operations, facilitate communication between the Contractor and third parties, prepare and maintain construction documentation. The duties of the CM shall include all efforts described in the Contract Documents and as are otherwise required for internal or document controls. In general, the services for the Project are anticipated to include but are not limited to the following:

Task 1: Coordination and Meeting Facilitation

The CM shall provide coordination and meeting facilitation including but not limited to the following:

Task 1.1 - Coordination:

The CM shall act as the primary contact for the District and shall provide coordination, facilitation, oversight, and monitoring between the District, Engineer/ Project Manager, Contractor, Specialty Inspectors, Utilities (e.g. SDG&E), and other jurisdictional agencies as appropriate during the execution of the project construction phases. The CM shall meet

with the District prior to the preconstruction meeting to thoroughly review the Project plans and specifications.

Task 1.2 – Preconstruction Meeting:

The CM shall work with District staff and Contractor to organize and conduct a Project Kick-Off Meeting within twenty-one (21) calendars days from Notice to Proceed. The CM will be responsible for preparing an agenda, distribution of contract documents, submission of list of Subcontractors and project schedule, which will be provided by the Contractor prior to meeting. The CM will also provide the designation of personnel representing the parties in Contract, procedures and processing of field decisions, submittals, substitutions, applications for progress payments, proposal request, Change Orders, and Contract closeout procedures, scheduling, scheduling activities of Subcontractors, procedures for testing, procedures for maintaining record documents. CM shall record minutes and distribute copies after meeting to participants and those affected by decisions made.

Task 1.3 – Progress Meeting Facilitation:

The CM shall work with District staff to organize, schedule and conduct bi-weekly progress meetings during construction and as-needed meetings for the project. The CM shall also conduct a preparatory meeting with the District ahead of the bi-weekly meetings to review logs, potential project issues, and address any outstanding District action items. For each meeting, the CM shall prepare an agenda for the meeting and provide copies for participants, document the meeting with minutes of the meeting, and distribute the meeting minutes to the project team within 5 working days. Meeting facilitation shall include, but not be limited to all elements listed in the respective Project Specification. Additional coordination meetings may be scheduled as required by the additional specifications herein.

Task 1.3 – Workshops

The CM shall work with the contractor and District staff to organize, schedule, and conduct the following workshops:

- a. Phase 1a - 4S Remote Sites
 - 1) Hardware Design & PLC/HMI/OIT Programing Workshop
 - 2) Installation and Commissioning Workshop
- b. Phase 1b - Distribution Remote Sites
 - 1) Hardware Design & PLC/HMI/OIT Programming Workshop
 - 2) Installation and Commissioning Workshop
- c. Phase 2a - 4SWRF
 - 1) Hardware Design Workshop
 - 2) PLC, HMI, OIT Programming & PLC Simulator Workshop
 - 3) Installation and Commissioning Workshop

d. Phase 2b - DCMWTP

- 1) Hardware Design Workshop
- 2) PLC, HMI, OIT Programming Workshop
- 3) Installation and Commissioning Workshop

Task 2: Contract Administration and Document Controls

The CM shall provide contract administration and document controls including but not limited to the following:

Task 2.1 - Contract Administration:

Create an electronic filing system for review and approval by the District. All documents shall be accessible to District staff at all times. Implement the procedures needed to fully document the project. All the key project documents, including but not limited to submittals, RFIs, Change Orders, Potential Change Orders, Clarifications, Field Memos, Daily Inspection Reports, correspondence, and other documentation generated during the project shall be available in the field. Original documents shall be filed with the District Project Manager as back-up.

Task 2.2 - Monthly Progress Reports:

Each month, the CM shall issue a project progress report. It shall summarize progress, schedule, issues and challenges, budget, any quality control issues and other relevant information as identified below:

- A summary of the weekly reports for the month
- A summary of the main accomplishments over the previous month
- Highlight any unresolved issues discussed during the biweekly meetings
- A summary of current construction activities
- Photographs of representative project activities
- A summary of progress payments, change orders, disputes, submittals, RFIs and Notices of Noncompliance
- Identification of key problems, action items and issues and include recommendation for solutions. See Task 3.5 also.
- Overall Contractor's conformance to the contract schedule and quality requirements
- Schedule updates

Monthly progress reports shall be illustrated with photos and begin with an executive summary. Copies of all monthly reports shall be distributed to team members.

Task 2.3 - Document and Deliverable Tracking:

The CM shall prepare a list of anticipated submittals, warranties, spare parts, and training for the Project to assist with tracking project requirements. The CM shall maintain electronic logs to document the status of anticipated submittals, warranties, spare parts, trainings, and RFIs. The CM/Inspector is responsible for verifying the Contractor is

updating the Project Redlines at the progress meeting. Additionally, the Project Redlines are to be current prior to release of monthly progress payments. The District will hold the CM/Inspector responsible for ensuring that the Project Redlines are up to date and accurate with the work that is installed. The District will withhold monthly progress payments to the CM/Inspector until the Contractor's Redlines are current.

Task 3: Construction Management

The CM shall provide construction management to ensure fulfillment of this Scope within budget and schedule. The CM is expected to provide continuous Quality Assurance and Quality Control of inspection activities. The CM shall provide construction management services including but not limited to the following:

Task 3.1 - Requests for Information (RFIs), Shop Drawings, and Submittal Review:

The CM shall log and review all incoming RFIs and submittals and provide recommendations to the District. The District shall have final review and approval on all submittals. Technical submittals shall be routed to the District or Engineer, as required. Administrative submittals, including but not limited to the construction schedule, schedule of values, permits, SWPPP, easement documents, shall be reviewed by the CM.

The CM will coordinate with District staff on the review of critical construction related submittals as required, including construction schedule, sequencing, construction staging, shut downs, hardware, and programming. As required, coordinate evaluation of "or-equal" or product substitution requests with the Design Engineer, the District, vendors, manufacturers, and others. Prepare evaluation and recommendation for "or-equal" or product substitution request as necessary. Hard copies are not necessary unless requested by the District or to facilitate discussion with the Contractor. Submittals shall be on District forms and all submittal responses shall be reviewed by the District prior to returning to the Contractor.

The CM shall compare the submittals against the submittal review log to ensure that all required submittals have been accounted for and logged. Initial RFI review shall be for completeness and compliance to contract administration procedures. The CM shall discuss both RFI and shop drawing submittals with the design engineer of record and District, providing relevant information as to field conditions and schedule priorities to assist in facilitating the technical review. The CM shall maintain a standing item on the weekly progress meeting agenda to review and discuss all outstanding RFIs and submittals. Data shall be maintained at a speed in which RFIs and submittals are responded to so outstanding items are not permitted to impact the progress of the project. All RFIs and shop drawing review responses shall be reviewed by the CM prior to returning them to the Contractor to ensure responses and comments comply with the construction contract.

Task 3.2 - Baseline and Monthly Schedule Review:

The CM shall meet with the Contractor prior to the initial baseline schedule submittal to discuss the contract requirements and review in general the Contractor's intended work

plan. Once the baseline schedule submittal has been received, the CM shall review and analyze it for contract compliance, viability, and to confirm the project float has not been inappropriately impacted. Once the baseline schedule is approved, the CM shall review the monthly updates for changes to the accepted baseline schedule. Requests for time submitted by the Contractor shall also be reviewed for merit, and appropriate recommendations shall be made to the District. The monthly schedule update analysis shall be to determine effect and appropriateness of schedule revisions to the Critical Path in relation to base contract Work, delays caused by the General Contractor and Work added by change orders. The CM's findings shall be returned to the Contractor.

Task 3.3 - Change Order Review and Documentation:

The CM shall review all change order requests and associated documents for the validity, cost, and schedule impacts. Validity will be established on a case by case basis by comparison of the scope change request with the construction contract requirements and consultation with the District's Project Manager and the design engineer. The CM shall manage change orders to obtain a fair and reasonable price for legitimate extra work items including keeping a log, weekly updates, and providing timely responses. The CM shall request and log change order (extra work) quotations as requested by the District or Contractor and shall coordinate the preparation of any revised specifications and/or sketches needed to define the scope of the extra work. The CM shall verify change order work performed on a time-and-materials basis daily. The CM shall track change order work activities using a CPM schedule to verify time extension impacts accompanying the change order. The CM shall prepare necessary cost estimates to compare and negotiate the Contractor's costs as required. The CM shall prepare a recommendation for acceptance or rejection of the terms of the change order to the District. If the change order is accepted, the CM shall prepare the document for signature. If there is disputed extra work, the CM shall work with the District and Contractor until the item has been satisfactorily resolved. If it is not resolved, the CM shall track the item as a potential claim. Each change order may contain several items. Hard copies are not necessary unless requested by the District or to facilitate discussion with the Contractor. Change orders shall be on District forms.

Task 3.4 - Progress Payment Review:

CM shall review Contractor's monthly progress payment requests for agreement with physical progress in the field and adjust the requests as necessary to include any special withholdings associated with non-compliant work. CM shall review the draft progress payments with the Contractor so any corrections can be made before formal submission. As part of the progress payment review process, the CM shall review the Contractor's as-builts, any required traffic control plans, and required storm water pollution prevention plan records to ensure they are up to date and fully compliant with the contract and permit requirements. The CM shall confirm with the District's appointed Third Party Labor Compliance Representative as part of the review process that the Contractor's required certified payroll records are correct and up to date. The Project Redlines (as-builts) are to be current prior to approval of the monthly progress payment.

Task 3.5 - Claims Avoidance and Analysis:

Throughout the project the CM shall actively work to identify and to resolve disputes fairly, to keep work moving on schedule, and ultimately to achieve superior quality in the final product. Should a dispute occur, the CM shall prepare a claim analysis report and work to resolve the dispute at the lowest level and at the earliest opportunity. The CM shall hold regular meetings to discuss outstanding dispute issues and to actively work toward the resolution.

Task 3.6 - Start-up, Testing, and Commissioning

The CM shall plan, coordinate, and assist with the closeout process for each project phase beginning with start-up, testing, and commissioning as required by the construction documents.

Task 3.7 - Project Closeout:

Following start-up, testing, and commissioning, the CM shall close out each phase so that the District can take beneficial occupancy of that phase. The CM shall complete an initial project walk through with District staff, then create contract punch list, and then complete the final job walk once the contractor has addressed the punch list. The CM will perform all needed inspections associated with the punch listed work, estimating the retainage for punch listed items, reviewing and organizing guarantees, certificates and warranties, delivery of O&M manuals and comments resolution, and working with the District to ensure that all required contract items have been provided, all punch list items have been resolved, and as-builts have been accepted. The CM shall ensure that all responsible parties have signed warranties, guarantees, and equipment systems certifications so that they are properly in-force. Should there be any open disputes, the CM shall work with the Contractor and the District staff to resolve them fairly and in a reasonable manner. Within 30 days of completing each phase, provide all project files to the District electronically in searchable PDF files organized.

Task 4: Construction Observation and Documentation

The CM shall provide construction observation and documentation for the Project for the relevant disciplines. The anticipated inspection work includes but not limited to the following:

Task 4.1 - Field Inspections:

When the contractor is completing field work, the CM shall perform as needed field inspections of the construction Work for compliance with the contract and applicable permit and code requirements. Field Inspections with photos capturing key work activities shall be documented on District-approved inspection forms with inspection reports itemizing the on-site manpower, the on-site sub-contractors, and the activities undertaken by the Contractor that day. Copies of the daily Field Inspection Reports shall be distributed to team members and the original signed copy shall be filed in the project file. The Construction Inspector shall be completely familiar with Project plans and specifications for

the project as well as with all current District standard specifications, applicable codes, public and job safety, and the project schedule. When the contractor is completing field work, the Construction Inspector shall walk the jobsite, meet with the Contractor's superintendent and review RFIs, change order requests, and submittals. The Construction Inspector will check that all project materials on the project site have an associated approved submittal and that any needed special inspections or tests required are scheduled. Working with the District, the Construction Inspector shall coordinate with all parties on the project and be available to answer local resident and business owner questions about project issues or concerns. When noncompliant work is identified, the Construction Inspector shall issue a finding on the noncompliance and if the noncompliance is not resolved by the end of the payment cycle, the Construction Inspector will recommend an appropriate withhold amount until the issue has been corrected. It is noted that noncompliant work includes but is not to be limited to issues with permits, contract specifications, building codes, storm water pollution prevention requirements, traffic control, noise, work hour violations, or other project related issues. The Construction Inspector shall provide and maintain equipment necessary to monitor noncompliant work. A running log of field issues with photographs of the specific concerns shall be maintained. The Construction Inspector shall review the log at the weekly progress meetings to ensure the Contractor understands the issue and addresses it in a timely manner. A special withholding from the Contractor's progress payment may be recommended for significant issues for which the progress toward issue resolution of the issue does not occur in a timely manner.

Task 4.2 - Materials Testing and Special Inspection:

Not used.

Task 4.4 - As-Built Contract Drawings:

The Construction Inspector shall incorporate all RFIs, field memos, and change orders on the CM's record set of construction drawings. The Construction Inspector shall also note daily on the record set as-built dimensional or other changes which occur in the field. The Inspector shall use the drawing to document the project during the progress payment review process. The CM/ Construction Inspector is responsible for verifying the Contractor is updating the Project Redlines at the biweekly progress meeting. Contractor will be developing redlines and as-builts for each phase of the Project. The District will hold the CM/ Construction Inspector responsible for ensuring that the Project Redlines are up to date and accurate with the work that is installed. The District will withhold monthly progress payments to the CM/ Construction Inspector until the Contractor's Redlines are current.

Upon completion of each phase of the Project, the Construction Inspector will review, sign, and date the as-built set to certify that they are complete and correct. Once the activity is complete, the drawings will be turned over to the District.

Task 4.6 - Site Safety:

The Contractor is responsible for overall site safety; however, the CM will oversee the Contractor's safety plan and its implementation. Should apparent unsafe conditions be observed, they will be immediately brought to the Contractor's attention. Should the Contractor fail to expeditiously remedy the situation, the CM shall notify the District immediately so a stop work order can be issued.

6.0 PROPOSED MODIFICATIONS TO THE SCOPE OF SERVICES

The District is interested in the Consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposed scope of services.

7.0 OMWD FURNISHED SERVICES TO SELECTED CM

The following information and services will be made available to the CM by the District:

- a. Conformed plans and specifications.
- b. Arrange meetings with its engineering and operations staff to gather information and review approaches, planning, and designs.
- c. Furnish electronic copies (where available) of record drawings, project reports and related materials. Any original materials provided by the District or developed by the CM during the duration of the project shall be returned to the District upon the completion of services.
- d. Answer questions regarding the Project at any time during all phases of the work.
- e. Make initial contact with customers and assist CM with coordination.
- f. Third party specialty inspections, materials testing, and environmental consulting services.

8.0 SPECIAL CONSIDERATIONS

The consultant shall schedule their services in a manner which will provide the necessary, timely services required during all phases of construction of this project. Extended and nighttime hours may be required in order to mitigate operational constraints.

9.0 PROPOSAL REQUIREMENTS

Written proposals are to include at a minimum a detailed a 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 Services. Estimation of hours with costs are to be provided with the proposal. Provide separate estimates for the Recycled Water

Pipeline Extensions Project and Unit A Pipeline Replacement Project. 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 consulting contract. the District 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.

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 all subconsultants. Key personnel assigned to the project shall not be reassigned without prior approval and the consultant shall request approval from the District before any new personnel are assigned to the project. The District 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 the District's Standard Agreement for Professional Services (Exhibit "A"). Any documentation required by the District 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 15 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.

Consultant Proposed Scope of Work, Hours, and Cost Proposal

A proposed Scope of Work shall be submitted as an Appendix to the Proposal. A cost proposal shall also be submitted with the Proposal which states a total fee, not-to-exceed upper limit. 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. The District 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 the District.

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. Provide a

contract summary with each invoice (contract value, invoiced previously, current invoice, invoiced to date, remaining, % invoiced). 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 District.

10.0 SUBMITTAL REQUIREMENTS

Submit to the District, one (1) executed document, in an electronic format (smart PDF) with navigable bookmarks via email to prebid@olivenhain.com.

The proposal shall not exceed fifteen (15) pages in length, excluding front and back cover, dividers, resumes and organizational chart, and appendices. Limit resumes to a maximum of two pages each. 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 Thursday, September 14, 2023 to:

prebid@olivenhain.com
OLIVENHAIN MUNICIPAL WATER DISTRICT
ATTN: Vanessa Rivera
Operations Coordinator

11.0 PRE-SUBMITTAL ACTIVITIES

Questions concerning this Request for Proposals should be directed in writing by email to prebid@olivenhain.com. The header of the email shall clearly state the reference project. **The deadline to submit questions is 2:00 p.m. PST, on Thursday, August 31, 2023.**

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 may be scheduled upon request. 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 lead project inspector may attend the meeting. Prior to the meeting, the interested

consultant teams should have thoroughly reviewed the RFP. Consultants may request to review additional design documents at the technical meeting.

To schedule a technical meeting, please submit a request to Vanessa Rivera, Operations Coordinator, at prebid@olivenhain.com, by **2:00 p.m. PST, on Thursday, August 24, 2023.**

The District reserves the right to revise the RFP before the date that Proposals are due. Revisions to the RFP will be posted to the website. The District reserves the right to extend the date by which the Proposals are due.

12.0 CONSULTANT NOMINATION AND SELECTION PROCESS

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

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

If necessary, the District 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 the District is unable to reach an acceptable agreement with the selected firm, the District 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 the District select that consultant and enter into a proposed agreement for the first project. Depending on the negotiated scope and fee, the agreement may be presented to the Board of Directors for consideration at the next regularly scheduled Board meeting.

13.0 EVALUATION CRITERIA

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

13.1 Approach to Work (30%)

- Understanding of project and objectives

- Identify potential challenges and solutions
- 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 (45%)

- 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 and its subconsultants

13.3 Project Experience (25%)

- Experience and Performance on similar projects
- Proven specialization of the firm on similar projects
- Complexity and geographic location of the project experience

14.0 SCHEDULE FOR NOMINATION, SELECTION, AND AWARD

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

- | | |
|--|-----------------------------|
| • Issue RFP | August 10, 2023 |
| • Deadline to Request Technical Meeting | August 24, 2023, 2:00 PM |
| • Last Day for Meetings with District | August 29, 2023, 2:00 PM |
| • Last Day for Questions | August 31, 2023, 2:00 PM |
| • Proposals Due | September 14, 2023, 2:00 PM |
| • Anticipated Notification of Selection* | Late September 2023 |
| • Anticipated Contract Negotiations* | October 2023 |
| • Anticipated Board Approval* | November 2023 |

**The District anticipates selecting a consultant based on the proposals received but reserves the right to interview selected firms, which may impact tentative dates.*

15.0 SPECIAL CONDITIONS

This RFP does not commit the District 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.

August 10, 2023

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

The District 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. The District reserves the right to reject all proposals and terminate the project. If the District cancels or revises the RFP, rejects all Proposals or terminates the project, all proposers will be notified in writing by the District.

The District 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 A) and to provide the Insurance Certificates and all other required documentation within 10 calendar days of notification of selection.

Proposals are due Thursday, September 14, 2023, at 2:00 pm.

Attachment:

Exhibit 1A – OMWD Standard Professional Services Agreement (PSA)