



REQUEST FOR PROPOSALS

FOR

VEHICLE FLEET ELECTRIFICATION FEASIBILITY STUDY AND CONCEPTUAL PLAN

OMWD CIP D179964

ISSUED DECEMBER 29, 2023

PROPOSALS DUE:

February 8, 2024, 2:00 P.M.

OLIVENHAIN MUNICIPAL WATER DISTRICT

Lindsey Stephenson, PE
Engineering Manager

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REQUEST FOR PROPOSALS FOR

VEHICLE FLEET ELECTRIFICATION FEASIBILITY STUDY AND CONCEPTUAL PLAN

1.0 INTRODUCTION

The Olivenhain Municipal Water District (OMWD) is seeking proposals from qualified engineering consultants (Consultant) to provide a feasibility study and conceptual plan for electrification of the vehicle fleet. The plan must address the State of California Air Resources Board (CARB) Zero-Emission Vehicle (ZEV) Requirements. The fleet inventory includes:

- 29 – ½ Ton Pickup Trucks (6 Due for replacement in FY 2025)
 - 14 – ¾ Ton Pickup Trucks with Utility Beds
 - 10 – ½ Ton Construction Trucks
 - 7 – Flatbed Trucks
 - 5 – Backhoes & Loaders
- *OMWD vehicles are historically evaluated for replacement at 100k mileage and/or 10 years old

OMWD stores vehicles at the following locations that will require consideration.

- Headquarters at 1966 Olivenhain Road, Encinitas, CA 92024.
- The David C. McCollom Water Treatment Plant (DCMWTP), 19090 Via Ambiente, Escondido, California.
- The 4S Ranch Water Reclamation Facility (4SWRF), 16595 Dove Canyon Road, San Diego, CA 92127.
- Duty vehicles are utilized at personal homes
- In an emergency situation, all vehicles could support OMWD's Emergency Operation Center

California Air Resources Board Advance Clean Fleets (ACF) Regulations

In April 2023, the State adopted the ACF which is intended to:

- Deploy medium- and heavy-duty zero-emissions vehicles (ZEV)
- Compliment the Advanced Clean Trucks (ACT) regulation of 2023 which ensures acceleration of large-scale fleet transition
- Help achieve the State's health protective air quality standards and climate goals.

The ACF timeline includes:

- 2024 – 50% of vehicle purchases are zero emissions, if the vehicles are available
- 2027 – 100% of fleet is ZEV, if the vehicles are available
- 2036 – Manufacturers may sell only ZEV medium- and heavy-duty vehicles
- Alternative Compliance
 - Meet ZEV targets using the phase-in ZEV milestones option

The ZEV Milestone Option allows flexibility to manage the fleet composition using a phase-in period. With this option, existing combustion-powered vehicles can be kept for their full useful life. OMWD falls within milestone group 2 with the following schedule:

- 2027 – 10%
- 2030 – 25%
- 2033 – 50%
- 2036 – 75%
- 2039 and beyond – 100%

AB 1594 was implemented in Fall 2023 and allows for emergency vehicles at water districts to be exempted. OMWD intends to pursue an exemption request for part or all of OMWD vehicles.

Scope of Work Overview

In general, the scope of work includes, but is not limited to:

1. Phase 1: Needs Assessment

- a. Summarize the State requirements and timelines that apply to OMWD.
- b. Review and inventory the OMWD vehicle fleet data and determine electrification requirements. Review considerations for maintenance, duty, and urgent response.
- c. Develop a baseline replacement plan for the approach and timeline for compliance and planning level cost estimate.
- d. Identify vehicles that could be exempted and prepare an exemption request.
- e. Estimate loads and initiate coordination with SDG&E
- f. Initiate coordination with neighbor agencies
- g. Identify regulatory agencies and funding opportunities.
- h. Provide a Needs Assessment Tech Memo.
- i. Provide Project Management and QAQC.

2. Phase 2: Infrastructure Planning

- a. Based on results of Needs Assessment TM and CARB exemption request and with written direction from OMWD, prepare a refined replacement plan.
- b. Evaluate the feasibility of charging locations and infrastructure.
- c. Update estimate electrical loads for charging. Continue to coordinate with SDG&E on refined power requirements at each site.
- d. Select project sites and layout improvements.
- e. Develop project phasing plan.
- f. Describe permitting and regulatory approvals.
- g. Estimate project costs and available financing and funding opportunities.
- h. Continue to coordinate with neighboring public agencies and develop concepts to share charging infrastructure.
- i. Summarize funding opportunities.
- j. Summarize operations and management changes.
- k. Develop Vehicle Fleet Electrification Feasibility Study and Conceptual Plan.
- l. Present to stakeholders.
- m. Provide Project Management and QAQC.

Goal and Objectives

The goal of this project is to develop a strategy for OMWD to comply with the CARB ZEV requirements and other State regulations, which may include.

- The “Advanced Clean Cars II Regulations” requiring all new passenger vehicles sold in California to have zero emissions by 2035, including AB 1594 which provides exemptions for emergency vehicles for water districts.
- Senate Bill 20 Requirements for Transition to ZEVs.

The key objectives of the project include:

1. Understand how requirements apply to OMWD and its vehicle fleet.
2. Develop a needs assessment.
3. Identify vehicles eligible for exemptions and submit exemption request.
4. Develop a fleet replacement plan that meets the requirements.
5. Develop a charging infrastructure plan at HQ and remote sites.
6. Optimize facilities through sharing with neighboring public agencies.
7. Develop a power supply plan and coordinate with SDG&E.

8. Estimate costs and identify funding opportunities.
9. Develop a Vehicle Fleet Electrification Feasibility Study and Conceptual Plan and schedule for implementation.
10. Present to OMWD stakeholders.

This RFP describes the project, the required scope of services, the consultant selection process, and the minimum information that must be included in the Proposal. Failure to submit information in accordance with the RFP requirements and procedures may be cause for disqualification. OMWD reserves the right to waive minor proposal deviations or omissions at its sole discretion. It is important to OMWD that the selected consultants have an established local office.

Based on proposals, OMWD reserves the right to award only Phase 1 and may re-assess the approach to Phase 2 based on budgeting and the results of the CARB exemption application. The professional services agreement (PSA) may be structured with an option for OMWD to continue with the selected consultant for the final design of project facilities, following successful completion of the initial phases.

2.0 OLIVENHAIN MUNICIPAL WATER DISTRICT

OMWD is a municipal water district organized and operating pursuant to Water Code Sections 71000 et seq. OMWD serves approximately 87,000 people through approximately 22,000 potable water connections, (28,000 meters) in a 48 square-mile area including 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.

3.0 BACKGROUND AND CIP BUDGET AND SCHEDULE

Planning, design, and construction for this project was included in OMWD’s Capital Improvement Program, within its fiscal years (FY) 2024 through FY 2027, as shown below.

| | FY 24 | FY 25 | FY 26 | FY 27 | Total |
|------------|-----------|-----------|------------|-------------|-------------|
| Water | \$150,000 | \$60,000 | \$750,000 | \$1,485,000 | \$2,445,000 |
| Wastewater | -- | \$ 15,000 | \$ 187,000 | \$ 748,000 | \$950,000 |
| Total | \$150,000 | \$75,000 | \$937,000 | \$2,233,000 | \$3,395,000 |

OMWD will update the budget in the spring of 2024 as a part of its biennial budgeting process.

The anticipated project schedule is:

- FY 2024 – Initiate Phase 1 of feasibility study and conceptual plan. The Needs Assessment Tech Memo is anticipated within one year of the Notice to Proceed.
- FY 2025 –Initiate Phase 2 of feasibility study and conceptual plan.
- FY 2026 – initiate design, environmental, and permitting.
- FY 2027 – Initiate construction.

4.0 OMWD PROJECT MANAGEMENT

The project will be managed by the Operations Manager, Jesse Bartlett-May, during Phase 1 and Engineering Manager, Lindsey Stephenson, during Phase 2, or their designated representative. Engineering and Operations will stay closely coordinated throughout the project, and the consultant will be expected to work with both departments.

5.0 SCOPE OF SERVICES

OMWD’s stated objective is to receive proposals from qualified consultants who can assist OMWD with the planning of the fleet electrification project. It is essential the selected consultant have expertise in the State requirements, CARB exemptions, SDG&E requirements, ZEVs, charging infrastructure, the planning and design of support

infrastructure, and an understanding of how a water/wastewater agency completes its work.

The following items should be considered a framework for the scope of services to be used in proposal formation for the project. OMWD understands this RFP may not fully describe the services envisioned. There may also be tasks listed in the scope that are not needed. Therefore, OMWD will be relying on the Consultant to provide modifications or amplifying information to the scope of services described herein based on their professional expertise in this subject area to improve the project. The Consultant is encouraged to incorporate items deemed necessary to meet the needs of OMWD in completion of the project, including attending the necessary meetings with OMWD to gather information, receive input and approvals, and review preliminary results.

PHASE 1 – NEEDS ASSESSMENT

Task 1.1 – Research

Review the available data and information, perform site visits, and meet with OMWD to confirm the information and the approach. The information includes but is not limited to that listed in the introduction to the RFP.

Summarize the State requirements that apply to the OMWD vehicle fleet. Review the ZEV Milestone Option vs. traditional compliance and identify which is most appropriate for OMWD.

Layout general timeline for OMWD compliance. Identify and discuss what the consequences are for non-compliance.

Identify CARB reporting requirements and frequency via TRUCKR or similar.

Task 1.2 – Fleet Inventory

Inventory the OMWD fleet, and review the OMWD fleet characteristics, replacement plans, parking locations, and historical data, including miles driven per day, anticipated job assignments such as towing, duty considerations, idling needs, typical down time (i.e., overnight), ZEV Milestone Option Group, Emergency Operations Center needs, and other relevant data. Identify whether each vehicle is appropriate for EV.

Conduct review meeting with staff to validate inventory.

Task 1.3 – Baseline Replacement Plan

Based on Fleet Inventory, recommend a phase-in of ZEVs, including types and makes based on purchase and operation and maintenance costs, availability and lead time, range, payload capacity, and other pertinent criteria. Develop replacement plan to identify how each vehicle would fit within ZEV Milestone Option, including year and Group. Identify any limitations on the vehicle conversions. Discuss feasibility of electric vehicles vs. other Zero Emission Vehicle options, such as hydrogen. Describe how the plan meets regulatory requirements.

Task 1.4 – Exemption Request

Identify vehicles that could be eligible for emergency vehicle exemption request under AB 1594 on behalf of OMWD.

Identify any other exemptions or extensions that could be applicable, including the mutual aid exemption or site electrification extension based on feedback from SDG&E.

Prepare an exemption request for OMWD to submit to CARB.

Task 1.5 – Estimate Load for Baseline Replacement Plan and Initiate Coordination with SDG&E

Estimate the maximum capacity for the load by site assuming all vehicles in the Baseline Replacement Plan would be electrified under the ZEV Milestone Option. Compare that to OMWD’s existing loads. Estimate the gap electrical loads and equipment required for charging vehicles, and other information required by SDG&E.

Initiate coordination with SDG&E on conservative load requirements at each site. Identify which grid each site is located in and other public agency fleets that will be electrifying under the same mandate in the same grid.

Task 1.6 – Initiate Coordination with Neighboring Public Agencies

Identify neighboring public agencies, including the San Diego County Water Authority, who may have similar charging infrastructure needs. OMWD will make the initial contact with the agencies and the consultant will follow-up to survey their approaches and coordinate and identify opportunities for efficiency and cost savings.

Task 1.7 – Identify Regulatory Agencies

Identify agencies with project review and approval authority and coordinate with them to determine requirements.

Task 1.8 - Identify Financing Opportunities

Identify opportunities for grants, rebates, and low-interest loan financing, and requirements, including but not limited to those offered by SDG&E and the San Diego

County Air Pollution Control District. Identify and analyze financing mechanisms and strategies to support the transition to ZEVs, including but not limited to:

- Energy or carbon savings performance contracting
- Utility grants and rebates
- Revolving fund loans
- Federal and State grant programs
- Private third-party financing
- Fleet management services
- Leasing
- Vehicle use optimization
- Vehicle to grid technology

Task 1.9 – Planning Level Cost Estimate

Provide a planning level cost estimate to support OMWD budgeting, assuming baseline replacement plan.

Task 1.10 – Needs Assessment Tech Memo

Prepare a Tech Memo that summarizes Phase 1. Submit a draft report, meet with staff to review, and submit a final report.

Task 1.11 – Phase 1 Project Management and QAQC

This task addresses the management responsibilities associated with proper scheduling review, budget control, and invoice preparation. Provide project management to achieve the project objectives and stay within budget and on schedule. Notify OMWD immediately if any budget or schedule variances are expected. Submit biweekly progress emails to OMWD and the team. The email should include:

- Budget status (past billings, current billings, to date billings, % complete)
- Work completed over the past reporting period
- Progress anticipated over the next reporting period
- Next deliverable due date
- Information required from OMWD
- Any issues which would delay delivery of the project on time

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

Task 1.12 – Phase 1 Coordination and Meetings

Budget and schedule as many meetings as necessary to complete the scope of work.

Prepare meeting agendas and minutes for each of these meetings, which will be distributed to all attendees. In addition to these meetings, as a part of their scope of work, support ongoing less formal coordination.

PHASE 2 – INFRASTRUCTURE PLANNING

Following Needs Assessment and response from CARB on exemption request, complete infrastructure planning for OMWD. For purposes of the proposal budgeting, assume Phase 2 will be completed for the entire fleet at all three sites. OMWD anticipates reviewing Phase 2 assumptions and fee estimates with the selected consultant prior to initiating Phase 2.

Task 1.13 – Refined Replacement Plan

Based on results from exemption request, update the Replacement Plan to exclude exempted vehicles.

Determine electrification charging requirements. Estimate greenhouse gas (GHG) reduction.

Task 1.14 – Prepare a Charging/ Refueling Infrastructure Needs Assessment

Prepare a charging infrastructure needs assessment for the planned OMWD vehicle fleet. Consider where the vehicles are typically stored and range. Identify needs by geographic location including power requirements, types and numbers of charging equipment, and support facilities, including quick/accelerated charge stations and/or generators. Evaluate cost, availability, and equipment lead times. Address duty-operator’s home charging.

Task 1.15 – Evaluate the Feasibility of Charging Locations

Evaluate the feasibility of installing charging infrastructure in the storage locations, and other locations, if required. If the sites are not feasible, recommend alternatives. Determine site charging capacity and identify any gaps in capacity and power availability.

Assess option to provide a public charging station and how to manage those.

Task 1.16 – Update Estimated Electrical Loads for Charging and Coordinate with SDG&E

Refine the estimated gap in electrical loads and equipment required for charging vehicles, and other information required by SDG&E. Identify which grid each site is located in and other public agency fleets that will be electrifying under the same mandate in the same grid.

Coordinate with SDG&E on power supply infrastructure, improvements, equipment, requirements, design, implementation schedules, costs and rebates/grants.

Review OMWD's Three Phase Renewable agreement and identify any opportunities.

Task 1.17 - Recommend Project Sites and Facilities

Recommend project sites and layout facilities including the number of EV charging stations. Prepare preliminary layouts for and compare the alternatives. Provide input on engineering issues to assist OMWD in making a decision. Identify property and right-of-way acquisitions that will be required.

Identify any areas within the project requiring special construction techniques or permits.

Provide the services to adequately develop the base mapping to support the concept plan. Existing mapping is expected to be adequate for this phase of the project. Recommend to OMWD any new mapping that is required.

Recommend the technology for chargers to meet any grant requirements and current best-practices. Recommend data tracking capabilities. Identify options for charging software program, summarize what other local water districts are using, and recommend power management technology and software.

Task 1.18 – Develop Project Implementation Phasing Plan

Develop a phasing plan to implement the project, including timelines to replace vehicles and to implement infrastructure.

Task 1.19- Estimate Costs

Estimate project capital and operation and maintenance costs. Summarize by implementation phase. Cost estimates should include but are not limited to:

- Vehicle acquisition
- Charging and refueling infrastructure for all sites, including software management
- Land and right of way acquisition
- Power supply infrastructure upgrades
- Staffing for charging and maintenance

Describe financial and other barriers to transitioning to an electric vehicle fleet.

Consultant shall prepare an opinion of probable construction cost broken down by the major items of work and by implementation phase. The costs shall be in current dollars and also escalated to the mid-point of construction. If the estimate exceeds OMWD's budget, identify phasing or other changes to stay within budget. Prepare a construction

schedule showing, at a minimum, completion of the plans, bidding, award, construction, and start-up. Identify key sequencing and constraints. Costs and schedules shall be updated with the draft and final reports.

Task 1.20 – Continue Coordination with Neighboring Public Agencies

Continue coordinating with neighboring public agencies, who may have similar charging infrastructure needs, to understand their approaches and coordinate opportunities for partnerships for efficiency and cost savings.

Task 1.21 – Review Alternative Ownership and Onsite Power Generation

Review and provide a recommendation of ownership, lease, and third-party ownership options for charging equipment. Consider return on investment, impacts of rapidly changing technology, staff capacity, costs and options for operations and maintenance agreements, and optimal schedules.

Evaluate the opportunities, capital and operating costs, and pay-back periods for on-site power generation and storage.

Task 1.22 - Describe Permitting and Regulatory Approvals

Summarize required permits and regulatory approvals including submittal requirements, schedule, and cost. Permits and approvals include but are not limited to environmental, interagency, power supplier, building/construction, and land use.

Task 1.23 – Refine Financing Opportunities

Refine the financing opportunities identified in Phase 1 and recommend most appropriate.

Task 1.24 – Recommend Workforce Development and Staffing Levels

Provide recommendations on workforce development to maintain, service, and repair a ZEV fleet and charging infrastructure including but not limited to:

- Estimates of hours
- Recommendations for future staffing levels and comparison to existing staffing levels
- Review of current and future job descriptions and identify opportunities in ZEV and charging equipment maintenance
- Develop training and education plans and schedules
- Estimate costs

Describe new or revised management and operations procedures. Describe management and operational software alternatives. Describe on-going fleet monitoring plan and compliance reporting requirements.

Task 1.25 – Prepare a Draft Vehicle Fleet Electrification Feasibility Study and Conceptual Plan

Prepare a draft report summarizing the work completed and recommending a concept plan. Meet with OMWD to present and discuss the draft report.

Prepare and submit three (3) hard copies and one (1) electronic copy (with electronic bookmarking) of the Draft Concept Report to OMWD for review. Incorporate OMWD comments after the review, allowing up to three (3) weeks for OMWD to review.

Task 1.26 – Present Draft to Stakeholders

Present the draft Feasibility and Concept Plan to the General Manager. Incorporate feedback. Then present to the Board at a Facilities Committee or full Board meeting.

Task 1.27 – Prepare Final Vehicle Fleet Electrification Feasibility Study and Conceptual Plan

Prepare a final report incorporating OMWD comments. Upon acceptance by OMWD, submit three (3) copies of the Final Concept Plan along with one (1) electronically submitted copy of the documents (with electronic bookmarking).

Task 1.28 – Phase 2 Project Management and QAQC

This task addresses the management responsibilities associated with proper scheduling review, budget control, and invoice preparation. Provide project management to achieve the project objectives and stay within budget and on schedule. Notify OMWD immediately if any budget or schedule variances are expected. Submit biweekly progress emails to OMWD and the team. The email should include:

- Budget status (past billings, current billings, to date billings, % complete)
- Work completed over the past reporting period, progress anticipated over the next reporting period
- Next deliverable due date
- Information required from OMWD
- Any issues which would delay delivery of the project on time

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

Task 1.29 – Phase 2 Coordination and Meetings

Budget and schedule as many meetings as necessary to complete the scope of work.

Prepare meeting agendas and minutes for each of these meetings, which will be distributed to all attendees. In addition to these meetings, as a part of their scope of work, support ongoing less formal coordination.

Future Tasks – ENVIRONMENTAL DOCUMENTATION SUPPORT, PUBLIC OUTREACH SUPPORT. FINAL DESIGN, BID SERVICES, AND ENGINEERING SERVICES DURING CONSTRUCTION

Following successful completion of the initial phases of the project facilities, the consultant may be selected to continue with additional future tasks, including environmental documentation support, public outreach support, final design, bid services, and engineering services during construction. Those services would be negotiated at that time and authorized separately.

6.0 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.

7.0 OMWD FURNISHED SERVICES TO SELECTED CONSULTANT

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

- Provide information on its current and planned vehicle fleet and current charging stations.
- 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 agencies and assist Consultant with coordination.

8.0 SPECIAL CONSIDERATIONS

None.

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 subconsultant(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 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 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 Consultant'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, date initiated, date completed (if applicable), and value of consulting contract. OMWD will consider consulting projects currently being performed. Identify the role of the key personnel proposed for OMWD's project. Present the experience of any specialty consultants.

Proposed Approach to Accomplish the Work

The project approach section shall set forth the Consultant's plan and ideas for organizing the work and achieving the objectives identified in this RFP. It should identify specific

stages of the work, project constraints, tasks, task order and work products. The Proposal should: 1) discuss the Consultant's plan for coordinating efficiently and effectively with OMWD staff, 2) provide an overview project schedule for completing the planning and design work considering your staff and current workload, 3) include a list of anticipated deliverables, and 4) offer creative ideas or enhancements to improve project approach and scope and meet OMWD's 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. For each of the key personnel identify their main work location.

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 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 and Comments on OMWD Standard PSA

The Consultant shall submit a statement verifying 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 subconsultants.

The Consultant shall provide as a separate appendix to their Proposal (not part of the maximum page count), any substantive comments or exceptions related to their ability and willingness to sign OMWD'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. The Consultant shall use the draft scope as the minimum work expected for completion of the project. If the Consultant determines additional scope items are required for the project, they shall include them in the scope of work and identify them as such. Provide a brief description of each item in the proposed scope of work which clearly describes the level of effort for that item. Consultant shall provide a Scope of Work for the Concept Plan only.

A cost proposal shall also 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, 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

The Consultant's fee estimate shall fully detail estimated costs. Columns shall be used to present labor hours and billing rate for each labor category or individual and each subcontractor. Columns shall be included for total estimated labor hours, total labor cost, total direct cost, and overall total cost. Cost lines shall be presented for each task and summarized by phase. The Fee Estimates shall be provided in a single table with a total sum at the bottom for both efforts.

Based on proposals, OMWD reserves the right to award only Phase 1 and may re-assess the approach to Phase 2 based on budgeting and the results of the CARB exemption application. The professional services agreement (PSA) may be structured with an option for OMWD to continue with the selected consultant for the final design of project facilities, following successful completion of the initial phases.

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, as well as invoiced previously, current invoice amount, and contract remaining. 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 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 OMWD.

10.0 SUBMITTAL REQUIREMENTS

Submit to OMWD, 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) one-sided pages (8-1/2" x 11") in length, excluding front and back cover, dividers, resumes and organizational chart, and appendices. Limit resumes to a maximum of two (2) 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. Limit the use of standardized marketing literature. Excessive marketing literature may not be reviewed.

The Proposal must be received no later than 2:00 p.m. PST, on Thursday, February 8, 2024 to:

prebid@olivenhain.com
OLIVENHAIN MUNICIPAL WATER DISTRICT
ATTN: Diana Spencer
Engineering Department Assistant

11.0 PRE-SUBMITTAL ACTIVITIES

Questions concerning this RFP should be directed in writing by email to prebid@olivenhain.com. The header of the email should clearly state the reference project. **The deadline to submit questions is 2 pm, Friday, January 26, 2024.**

The Consultant shall not contact other agencies potentially involved in the Project.

No pre-proposal meeting will 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. Prior to the meetings, the interested consultant teams should have thoroughly reviewed background materials. The proposed consultant project manager and project engineer should attend the meeting at a minimum. **To schedule a meeting, please submit a request to Diana Spencer, Engineering Department Assistant, at prebid@olivenhain.com by Wednesday, January 17, 2024.** Technical meetings will be held no later than Wednesday, January 24, 2024; so consultant teams are encouraged to schedule meetings as soon as possible after the RFP is released.

OMWD reserves the right to revise the RFP before the date Proposals are due. Revisions to the RFP will be posted to website for all potential proposers. OMWD 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 OMWD, and possibly outside agencies. The Panel will evaluate the Proposals based on the information submitted.

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

If necessary, OMWD will enter into negotiations with the selected consultant. 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 consultant, OMWD will terminate negotiations with the selected consultant and negotiations with the second ranked consultant will be initiated.

After negotiating a proposed agreement that is fair and reasonable, the negotiating team will recommend to the General Manager to enter into the proposed agreement. Depending on the negotiated scope and fee, the agreement may be presented to the Board of Directors for consideration at the next regularly scheduled meeting.

13.0 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 (30%)

- Understanding of project and objectives
- Responsiveness to issues identified in RFP
- Level of detail discussed
- Creative, efficient, and cost-effective ideas and methods for the design and construction of the project
- 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
- Completeness of the fee estimate considering the proposed scope of work

13.2 Project Manager and Team Qualifications (30%)

- Specialized Qualifications and geographic location 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 the Consultant and its subconsultants

13.3 Project Experience (40%)

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

14.0 SCHEDULE FOR NOMINATION, SELECTION, AND AWARD

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

- | | |
|---|---------------------------------|
| • RFP Issued | December 29, 2023 |
| • Deadline to Request a Technical Meeting | January 17, 2024 |
| • Last Day for Technical Meeting | January 24, 2024; |
| • Deadline for Questions | January 26, 2024; 2 pm PST |
| • Proposals Due | February 8, 2024; 2 pm PST |
| • Interviews (If Needed)* | Late February/Early March, 2024 |
| • Notification of Selection* | March 2024 |
| • Contract Negotiations* | March/April 2024 |
| • Board Award (if Needed)* | April/May, 2024 |
| • Notice to Proceed* | May/June, 2024 |

*Anticipated date; scheduled date impacted if consultant interviews are added to selection process.

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

Proposals are due February 8, 2024 at 2:00 p.m.

Attachments:

Exhibit A – Draft Professional Services Agreement