

**MUNICIPAL WATER DISTRICT
OF
ORANGE COUNTY**

**REQUEST FOR PROPOSALS
TO PROVIDE**

**INDEPENDENT PROCESS AND QUALITY CONTROL
EVALUATION OF TURF REMOVAL REBATE PROGRAM**

RFP No. 2014-1

October 14, 2014

Questions for clarification are due by: **3 pm, Tuesday, October 21, 2014**
Proposals will be received until **3 pm, October 28, 2014**
The Municipal Water District of Orange County
18700 Ward Street, Fountain Valley, CA 92708
P.O. Box 20895, Fountain Valley, CA. 92728
or by e-mail to: jberg@mwdoc.com

Table of Contents

Section 1: Information for Respondents.....	3
Municipal Water District of Orange County	3
Brief Description of Services	3
Business Outreach	3
Request for Clarification	4
Confidentiality.....	4
Award of Contract.....	4
Sample Agreement	4
Section 2: Scope of Services.....	4
General.....	4
Professional Services Required	5
Process Evaluation -	5
Quality Control Evaluation -	6
Deliverable -	6
Section 3: Proposal Evaluation	6
General.....	6
Approach.....	6
Experience.....	6
Cost Proposal	6
Evaluation Process	6
Section 4: Proposal Instructions	7
General.....	7
Proposal Format.....	7

Section 1: Information for Respondents

Municipal Water District of Orange County

The Municipal Water District of Orange County (MWDOC) is a public agency, formed by Orange County voters in 1951 under the Municipal Water District Act of 1911. MWDOC'S mission is to provide reliable, high-quality water supplies from the Metropolitan Water District of Southern California (MWD) and other sources to meet present and future needs, at an equitable and economical cost, and to promote water use efficiency for all of Orange County. MWDOC provides wholesale water service to 29 retail member agencies. The population served is approximately 2 million consumers in a 600 square mile area. Its efforts are focused on sound planning and appropriate investment in water supply reliability, regional delivery infrastructure and emergency preparedness.

MWDOC is a member of the MWD, which supplies imported water to six Southern California counties. Today, MWDOC is MWD's third largest member agency, providing and managing the imported water supplies used in Orange County.

The Municipal Water District of Orange County, headquartered in Fountain Valley, is governed by a seven-member elected Board of Directors, each Board member representing a specific division of the County.

MWDOC is a recognized leader in its water use efficiency programs. Through an innovative, multi-agency approach, MWDOC has formed partnerships with local, regional, state and federal agencies to create award-winning multi-benefit water use efficiency programs that target all water users – residential/commercial property owners, businesses and industrial customers.

Residential water use surveys, the ultra low-flush toilet rebate program, the landscape certification program and the smart irrigation timer (outdoor irrigation system) rebate programs are just some of MWDOC's ongoing efforts to help maximize the efficient use of water. These programs are saving more than 12.8 billion gallons of water each year - water that can be used to meet increasing demands without developing new supplies.

Brief Description of Services

This year, it is anticipated that more than \$7 million in rebate incentives will be processed through the Turf Removal Rebate Program. As part of MWDOC's ongoing Water Use Efficiency Program quality control efforts, staff has selected the Turf Removal Rebate Program for an independent process and quality control evaluation. This process and quality control evaluation are the focus of this RFP.

Business Outreach

1. MWDOC is committed to creating an environment which affords all individuals and businesses open access to the business opportunities available within the regional service area in a manner that reflects the diversity of its service area.
2. It is MWDOC'S policy to solicit participation in the performance of all construction, professional services, procurement contracts, supplies, and equipment procured by MWDOC by all

individuals and businesses, including but not limited to small businesses, locally owned businesses, women, minorities and economically disadvantaged enterprises.

Request for Clarification

Firms requesting clarification pertaining to this RFP must submit all requests by **3 pm, Tuesday, October 21, 2014** to *Joe Berg*, at Jberg@mwdoc.com. MWDOC reserves the right to exercise its option to answer questions related to this RFP. Only email requests for clarification submittals will be addressed by MWDOC.

Confidentiality

1. MWDOC is subject to the Public Records Act, California Government Code Section 6250 et. seq. As such, all required submittal information is subject to disclosure to the general public.
2. Respondent may provide supplemental information exempt from public disclosure under Gov. Code § 6254, including "trade secrets" under Evidence Code § 1060. Such supplemental information shall not be material to the required submittal information and MWDOC shall be under no obligation to consider such supplemental information in its evaluation.
3. If submitting confidential, supplemental information, such information shall be submitted on a different color paper than, and bound separate from, the rest of the submittal, and shall be clearly marked "Confidential." Upon completion of its evaluation, MWDOC will destroy any confidential, supplemental information.

Award of Contract

After a Respondent is selected, the award of a contract (agreement) is contingent upon the successful negotiation of terms, acceptability of fees, and formal approval by MWDOC.

Sample Agreement

Attachment 1 is a copy of MWDOC's sample agreement. Before submitting your proposal, you are requested to carefully review all of the provisions set forth in the sample agreement. MWDOC reserves the right to modify, add or delete any of the provisions of the agreement prior to issuance of an agreement. Insurance requirements for this RFP are listed in the sample agreement.

Section 2: Scope of Services

General

This year, it is anticipated that more than \$7 million in rebates incentive will be processed through MWDOC's Turf Removal Rebate Program. As part of MWDOC's ongoing Water Use Efficiency Program quality control efforts, staff has selected the Turf Removal Rebate Program for an independent process and quality control evaluation.

This program is implemented utilizing in-house staff to process rebate applications, distributing pre- and post-inspection work orders, and rebate check processing. A combination of staff from the Orange County Retail Water Agencies and Mission Resource Conservation District (a third party installation

inspection contractor under contract with MWDOC) performs on-site pre- and post-retrofit inspections and area measurements. Pre-turf removal inspections are designed to:

1. Verify program eligibility by confirming the project area contains well maintained turf grass, and
2. Obtain a measurement of the project area that will be used to calculate the potential rebate to be reserved for that participant.

Post-turf removal inspections are designed to:

1. Confirm the original turf area targeted for removal was in fact removed,
2. Obtain a measurement of the turf grass area removed that will be used to calculate the final rebate, and
3. Confirm that the completed project area meets program guidelines.

MWDOC has been implementing this paper based program utilizing in-house developed tools including marketing materials, a paper and online rebate application, program terms and conditions, and a rebate processing web data base for over three years.

At the beginning of the calendar year, we were receiving approximately ten applications per week. Since that time, the Governor declared a drought, local agencies adopted drought ordinances, and the State Water Resources Control Board adopted Emergency Drought Regulations. Currently, we are receiving more than 100 applications per week. The mix of paper versus electronic applications is currently 25% paper and 75% online. To learn more about this program, go to:

<http://www.mwdoc.com/services/turf-removal>

Professional Services Requested

Requested deliverables associated with this RFP shall include both a Process and Quality Control Evaluation. These evaluations will look at:

Process Evaluation -

1. Review and evaluate all steps involved in processing a rebate application including:
 - a. Initial information gathering from the website and phone inquires
 - b. Online and paper rebate application
 - c. Pre-inspection work order processing
 - d. Pre-inspection field visit data collection
 - e. Authorization to proceed and in-eligibility notifications
 - f. Participant notification of completion
 - g. Post-inspection work order processing
 - h. Post-inspection field visit data collection
 - i. Application approval evaluation
 - j. Issuance of rebate check by MWDOC
2. Evaluate the timeliness of rebate application processing and look for opportunities for streamlining while maintaining a high degree of program integrity,
3. Conduct a workload analysis and provide recommendations for appropriate staffing levels,

4. Evaluate our existing rebate processing data basing platform and make recommendations for improvements

Quality Control Evaluation -

1. Separation of responsibility within the steps to process rebate checks,
2. Sufficiency of in-field pre- and post-retrofit inspections,

Deliverable -

Following the Proposal Instructions, the Respondent will provide a written report summarizing the findings of the Process and Quality Control Evaluation along with detailed recommendations for refinements.

Section 3: Proposal Evaluation

General

The following criteria will be used for the evaluation and selection of Respondent and is required of each submittal. The order of the listed criteria is not indicative of its priority, weighting or importance.

Respondent must follow the instructions outlined in Section 4 below. Those **RFP 2014-1** submittals that do not follow the outline as described herein will not be considered.

Approach

1. Narrative discussion of why consultant is especially qualified to perform services described in the scope of work.
2. Narrative discussion of the approach to be used for the process and quality control evaluation of the Turf Removal Rebate Program.

Experience

1. Submit resumes of key Respondents that describe qualifications, education, and previous experience to perform the services described in the scope of work.
2. Experience that shows demonstrated knowledge in providing the services described in the scope of work.
3. References from two different sources that engaged consultant to perform similar services described in the scope of work within the last five years, particularly work performed for a public agency.

Cost Proposal

1. A cost proposal shall be submitted in a sealed envelope with the proposal. The cost proposal shall indicate costs for:
 - a. The overall project on a time and materials basis, with a final not to exceed cost, and
 - b. Hourly rate for each person who will be working on the submittal.

Evaluation Process

1. MWDOC will evaluate all responsive proposals and may select a Respondent based solely on their proposal or MWDOC may select a short listed group of Respondents to participant in an

interview session. The interview process may ask Respondent and key authors to present additional information or participate in a question and answer session to further clarify their proposal.

2. All short listed Respondents will be notified either in writing or by e-mail (when and where) to appear for an interview, if required.

Section 4: Proposal Instructions

General

Respondents are encouraged to carefully review this RFP in its entirety prior to preparation of the proposal. MWDOC reserves the right to reject any or all proposals or select the proposal most advantageous to MWDOC. MWDOC reserves the right to verify all information submitted in the proposal.

1. MWDOC reserves the right to amend the RFP or issue to all Respondents a Notice of Amendment to answer questions for clarification.
2. Respondent may modify or amend its proposal only if MWDOC receives amendments prior to the deadline stated herein for receiving proposals.
3. If Respondent forms a joint venture, a copy of the joint venture agreement will be requested if Respondent is selected for award. **Do not** submit the joint venture agreement with the proposal.
4. A proposal may be considered non-responsive if conditional, incomplete, does not follow these instructions, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the proposal.
5. MWDOC will not be responsible for submittals that are delinquent, lost, mismarked, sent to an address other than that given herein, or sent by mail or courier service and not signed for by MWDOC.

Proposal Format

1. Proposals shall be limited to four pages in length including a cover a letter. Proposals shall be clear, accurate, and comprehensive using the Calibri font size 12 for the main body of text. Pages must be numbered and use the titles below. Excessive or irrelevant materials will not be favorably received. Proposals shall include the following:
 - a. Proposal Transmittal Cover Letter
 - b. Executive Summary
 - c. Approach
 - d. Experience, and
 - e. References
2. Respondents shall include resumes of all key authors with the proposal which will not be counted in the four page proposal limit.
3. A cost proposal shall be submitted in a sealed envelope with the proposal.
4. Proposals shall be enclosed in a sealed package and Respondent's name and address shall appear in the upper left-hand corner of the package.

5. Proposals will be received until **3 pm, Tuesday, October 28, 2014**. Proposals received after this time and date will be returned unopened.
6. Respondent shall submit their proposal to Joe Berg at MWDOC at the address listed below:

By mail:

Municipal Water District of Orange County
P.O. Box 20895
Fountain Valley, CA. 92728

Attn.: Joe Berg
RE: RFP **2014-1**

In Person or by Courier:

Municipal Water District of Orange County
18700 Ward Street
Fountain Valley, CA. 92708

Attn.: Joe Berg
RE: RFP **2014-1**