

**MUNICIPAL WATER DISTRICT OF ORANGE COUNTY
(MWDOC)**

**REQUEST FOR QUALIFICATIONS
TO PROVIDE**

CONSULTING SERVICES FOR PROFESSIONAL COMMUNICATION SERVICES

RFQ No 596

FEBRUARY 2014

Requests for clarification are due: **5:00 p.m., March 7, 2014**
Qualifications will be received **until 4:00 p.m., March 21, 2014**
at Municipal Water District of Orange County
18700 Ward Street, Fountain Valley, California 92708

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REQUEST FOR QUALIFICATIONS

SECTION 1

INFORMATION FOR RESPONDENTS

Description of Services and Requested Qualifications

The Municipal Water District of Orange County (MWDOC) is seeking qualifications from established Consulting firms (Respondent) that are capable of implementing the Professional Communications Services (Services). Responses to this Request for Qualifications (RFQ) will be used to select a Consulting firm for professional communications services.

The Term of the Project shall begin immediately upon the successful execution of an Agreement between MWDOC and Respondent, and will continue until the project is complete which is expected to be September 30, 2014.

The Scope of Services, Section 2 of the RFQ describes the services required. MWDOC reserves the right to modify the Services as necessary after selection of a Consultant.

A brief description of the Professional Communications Services includes:

1. Review and provide meaningful input on the Draft Value of Water Communications Plan, including:
 - Value Investment Matrix
 - Marketing approach
 - Draft messaging
 - Proposed media strategy
 - Goals and objectives
2. Focus Groups
 - Develop a comprehensive question guide (Guide)
 - Meet with MWDOC staff and other stakeholders to review and refine the Guide
 - Conduct a series of 6-10 focus groups throughout MWDOC's service area
 - Provide an update to MWDOC's 28 member agency managers on anticipated results
3. Technical Assistance
 - Provide ongoing subject matter expertise in regards to relevant communication efforts, metrics, business model refinements, appropriate media channels, consumer sentiments and creative materials

4. Creative
 - Develop **appropriate creative materials to support messaging and outreach goals and objectives**
 - Materials will need to be adaptable to electronic and print media
5. Reporting
 - Monthly Progress Reports
 - Final Report

Requests for Clarification

1. Respondents requesting clarification pertaining to this RFQ must e-mail or fax all requests by **5:00 p.m., Friday, March 7, 2014**, to Darcy M. Burke via email at dburke@mwdoc.com or via fax at (714) 964-5930. MWDOC will endeavor to respond fully to all timely requests, but reserves the right not to respond to requests that are duplicative or do not advance the objectives of the RFQ.
2. In lieu of a pre-qualifications meeting, all requests for clarification submitted on time will be reviewed and answered via email by **5:00 p.m., Thursday, March 13, 2014**. The requests for clarification and MWDOC's responses will be distributed to all parties that notified MWDOC of their intent to respond to this RFQ by email by end of business **Thursday, March 13, 2014**. Respondents' names will be removed from the requests prior to distribution.

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, except as otherwise provided herein.
2. Respondents may provide MWDOC with records that are exempt from public disclosure under Gov. Code § 6254.15, including "trade secrets" under Evidence Code § 1060, but only as supplemental information. Such supplemental information may not form an essential part of the required submittal information, and MWDOC reserves the right to disregard such supplemental information in its evaluation of a particular qualifications set.
3. All supplemental information that a submitting Respondent intends to remain exempt from disclosure shall be submitted on a different color paper than, and bound separately from, the qualifications themselves and shall be clearly marked "Confidential." Unless other provisions are made in advance by the submitting Respondent, upon completion of its evaluation, MWDOC will destroy any confidential supplemental information. Respondents submitting confidential supplemental information bear all risks of its release, irrespective of the means, and

shall hold MWDOC harmless against any claims related to such release of information.

Indemnification and Insurance

1. The Consultant(s) ultimately awarded a contract in response to this RFQ must execute MWDOC's Standard Agreement for Consultant Services in the form attached hereto as Exhibit E, and all insurance requirements stated therein must be met.
2. As a separate obligation under the Professional Services Agreement, the Consultant(s) must indemnify and hold MWDOC harmless on the terms and conditions set forth in Exhibit E.

Award of Contract

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

Financial Capacity

1. Prior to award of a contract, one or more Respondents may be requested to demonstrate past relevant experience, subject matter expertise and financial stability.

MWDOC's Professional Services Agreement

1. Exhibit E is a copy of MWDOC's Standard Agreement for Consultant Services. Before submitting your qualifications, you are requested to carefully review all of the provisions set forth in Exhibit E. MWDOC reserves the right to modify, add or delete any of the provisions of the agreement prior to issuance of an agreement, but in general you should assume this is the primary contract document for the Program.

Definitions

1. Agreement: The contract documents for the Program, including the MWDOC Professional Services Agreement, the attached Scope of Work and/or qualifications, and the required insurance documentation.
2. Project Manager/Agreement Administrator: The MWDOC employee assigned to administer the work to be accomplished by Respondent and the primary point of contact between MWDOC and Respondent.
3. Consultant: The party entering into an Agreement with MWDOC for the performance of the work described in this RFQ.
4. Cost Proposal: A total cost for those items identified in Section 2, Scope of Services.

5. Joint Venture: An association of two or more persons or firms engaged in the cooperative effort of providing services described in the Scope of Services for which qualifications are being submitted.
6. Key Personnel: Lead members of Respondent's team and actual direct participants in the services. Key personnel may include the Respondent's employees or a Subcontractor.
7. MWDOC: MWDOC as used hereinafter shall refer to the Municipal Water District of Orange County.
8. Request for Qualifications (RFQ): This solicitation for qualifications from potential Respondents to perform the work described in the Scope of Services and in accordance with the terms of the Agreement.
9. Respondent: A sole proprietor, partnership, corporation, or joint venture submitting qualifications or response to MWDOC's RFQ.
10. Subcontractor: Any person, firm, or corporation performing work or providing service for the Respondent in support of the Scope of Services for an agreement.

SECTION 2

SCOPE OF SERVICES

Project Background

Price is what you pay; value is what you get. For decades water agencies have informed and assured customers that water is reliable and well managed in Orange County. Throughout this time, residents have come to expect that water is a resource to which they are entitled. Unfortunately, residents take for granted or lack the understanding of the infrastructure, manpower, engineering and resources which are dedicated to making high-quality water more reliable and bringing it to them in sustainable, efficient ways.

The recent economic downturn, slow recovery and drought have made this situation more complex. People have seen their consumption of water decrease while their bills have increased. Although their water bills remain the lowest of utilities, water rate increases in this context have been vexing to many. The need for investment in an aging infrastructure, quality enhancements, new supply development and engineering in order to prepare the region for economic growth is not clear to many. As funding for the BDCP comes before the public in a bond measure, this gap in the public's appreciation for this will is even larger.

In order to strategically approach this gap in understanding, MWDOC is undertaking a well-defined research program with its member agencies to develop trustworthy and impactful messages for a public outreach campaign. The member agencies and their public affairs professionals will utilize these messages as they see the need when informing the various stakeholders. The messages and themes developed will be vetted utilizing communications best practices so that they are most effective for particular audiences (e.g. small businesses, large businesses, older residents, younger homeowners, etc). The messages will be part of outreach efforts crafted with the member agencies to educate the various stakeholders in each community and may include:

- Chambers of commerce meetings
- Rotary and other business or trade association meetings
- Bill stuffers, newsletters, public meetings, town halls
- Internal communications, posters, exhibits

Building value is part of the overall effort to establish trust and credibility. People want to know that you care about their concerns, share their values and are engaged in an ongoing dialogue to keep them informed. The Municipal Water District of Orange County's Board of Directors (MWDOC) recognized the need to engage in a dialogue with the Orange County public in their 2010 Strategic Plan goal: *"MWDOC will engage and understand its member agencies and the communities it serves in order to meet their water needs and ensure that these communities understand the water challenges faced by the region"*. The MWDOC

member agency managers amplified this sentiment in their 2011 priority-setting workshop where improving “credibility with customers” as a work priority received the highest level of support. To instill a meaningful value and understanding for water reliability, ongoing water investments and water use efficiency are needed at the Orange County consumer level.

Regional Objectives

- **Objective 1: Build a public majority consensus for water reliability planning and investments**
- **Objective 2: Build a public majority consensus for local water project investments**
- **Objective 3: Build a public majority consensus for water rate increases**
- **Objective 4: Build a public majority consensus for the value of water and water service at the local level**
- **Objective 5: Build a public majority consensus for restoring the Bay Delta and alternate conveyance**
- **Objective 6: Build a public majority consensus for continued and increased water use efficiency**
- **Objective 7: Build a public majority consensus for supporting the outcomes in Metropolitan’s Market Transformation Plan, <http://edmsidm.mwdh2o.com/idmweb/cache/MWD%20EDMS/003721609-1.pdf>**

The Value of Water Communications Plan is a long-term effort designed to engage, educate and inform Orange County residents and businesses of the value water service provides. In addition, one of the additional benefits of this plan will be to improve public trust and credibility. Changing public perception and sentiment as well as instilling public trust is a long-term effort. It is not a switch that you turn on and off overnight; rather it is a commitment that the family of Orange County Water Agencies make every day, with each customer and stakeholder interaction. The Value of Water effort will be determined successful if we meet the goal of instilling a meaningful value and understanding for water reliability, ongoing water investments and water use efficiency at the Orange County consumer level. This will be demonstrated on public support of water projects, water rates, water programs, increased water use efficiency and overall public awareness.

Meetings with the MWDOC's Public Affairs staff, Board of Directors, Committee meetings and Member Agencies.

- Consultant will participate in MWDOC meetings that may include, staff, member agencies and other stakeholders to develop a comprehensive question guide for the regional focus group study.
- Consultant will recommend the number, location and target audience for the focus group study based on the regional goals, objectives and available funding.
- Consultant will meet with stakeholder group half way through the focus group study to provide an update, assessment and progress report. Modifications to the question guide may be incorporated depending on anticipated outcomes, lessons learned, new information or other determining factors.
- Consultant will present a finalized report of the focus group study no later than June 30, 2014.

Subject Matter Expertise

- Consultant will provide ongoing subject matter expertise for the Value of Water communications plan, associated metrics, messaging, media strategy, value model and other related activities.

Presentations

- Consultant will provide presentations on the focus groups effort, reporting and question guide as well as other related activities as requested to stakeholders interested in receiving a presentation.

Creative

- Consultant will provide recommended creative elements, messaging and media channels no later than August 15, 2014.

Final Report

Consultant will prepare a final report of the Focus Group study, recommendations to the Value of Water Communication Plan and other related recommendations by June 30, 2014. Ten copies of the final report will be submitted to the District within 30 days after the initial review. The final report will include a narrative description of the entire Project, a discussion of any challenges encountered and how they were resolved, findings, participant comments, and recommendations. Illustrative graphs, charts, and

tables should be used to complement the narrative. The report will also include summary data of focus groups as follows:

- Demographics of participants in focus groups
- Number of participants
- Date and location of focus groups
- Name and credentials of facilitator
- Question Guide
- Key findings
- Recommended next steps
- Executive summary

Invoicing

Payment for services will be on a time and materials basis, billed at the hourly rates specified in the proposed budget attached as exhibit B. Consultant will invoice MWDOC, on a monthly basis, in accordance with MWDOC's reporting requirements by the 15th of each month for the services performed in the previous month. Back-up information showing the services performed and the Consultant staff member performing the services will be submitted with each invoice. Total compensation for all services specified in this scope of work shall not exceed \$130,000. Failure to provide the invoice and report within 10 days of the due date will result on late submission fee of a 10% deduction of the invoice amount.

MWDOC shall retain ten percent (10%) of each approved monthly invoice amount as partial security for the fulfillment of the Agreement by Consultant. These retained funds shall not be maintained in a separate account on behalf of Consultant, and no interest shall accrue on the funds. In the event the Agreement terminates at the end of its full term, MWDOC will release the retained funds to Consultant within thirty (30) days of acceptance by MWDOC Staff of Consultant's "Final Report," as described in this Scope of Work. In the event the Agreement terminates, MWDOC will release the retained funds, minus any disputed amounts, either within thirty (30) days after the expiration of the expiration of the 30-day period following termination for Consultant to submit invoices and backup information, or within thirty (30) days of acceptance by MWDOC staff of any report submitted by Consultant after the effective date of termination, whichever occurs later.

SECTION 3

QUALIFICATIONS

General

The following items are the required components of Respondent's response to this RFQ. MWDOC will utilize these components for purposes of evaluating Respondent's response during the review and evaluation period. The order of the listed criteria is not indicative of their priority, weighting or importance.

Approach

1. Narrative discussion of why Respondent is especially qualified to perform services described in this RFQ.
2. Description of how the Respondent will develop the Question Guide.
3. Description of how the Respondent will conduct Focus Groups and what target audiences are recommended.
4. Describe the Respondent's skill set and experience in providing Subject Matter Expertise in communications plan development and implementation, business model development and refinement, consumer insight, media channel strategy, creative development, metrics and evaluation.
5. Description of how the Respondent will develop and provide related creative materials.
6. Project Timeline.
7. Project Budget.

Experience

1. Submit resumes of Respondent key personnel who will work on this Project. Resumes should describe qualifications, education, and relevant previous experience to perform the services described in the Scope of Services.
2. Submit an organizational chart indicating lines of authority and designate the main point of contact and Consultant's project manager for this project.
3. Describe experience that shows demonstrated knowledge in providing the services described in the Scope of Services. Respondent shall have technical expertise in conducting focus groups, developing question guides, developing related creative materials and messages, knowledge and understanding of complex business

models and applications as well as experience with stakeholder engagement in the water industry.

References

1. Provide references from **three to five different sources** that engaged Respondent to perform the services described in the Scope of Services within the last five years similar in size and scope, particularly work performed for a public agency.
2. List the most current projects first by name, title, organization, address, telephone numbers, email addresses, completion dates and total costs of completed projects from projects listed above.

Cost Proposal

1. A cost proposal shall be submitted, using the Budget Table provided in Exhibit C, in a sealed envelope with the qualifications. The cost proposal shall cover all items as part of this RFQ and shall indicate costs and budgeted hours broken down for each task and subtask. Hourly rates for each member of the project team shall be included.

Qualifications Evaluation Process

1. MWDOC will evaluate all responsive qualifications using the criteria provided in Exhibit D and may select a Respondent based solely on their qualifications or MWDOC may select a short listed group of Respondents to participant in an interview session. The interview process may ask Respondent key personnel to present additional information or participate in a question and answer session to further clarify their qualifications.
2. All Respondents will be notified by March 31st of the selection. Formal Notification will be in writing and mailed to the address provided.

SECTION 4

QUALIFICATIONS INSTRUCTIONS

General

Respondents are encouraged to carefully review this RFQ and the Checklist (Exhibit B) in its entirety prior to preparation of the qualifications. MWDOC reserves the right to reject any or all qualifications or select the qualifications most advantageous to MWDOC. MWDOC reserves the right to verify all information submitted in the qualifications packet.

1. MWDOC reserves the right to amend this RFQ or issue to all Respondents a Notice of Amendment to answer questions for clarification.
2. MWDOC reserves the right to reject any or all responses for whatever reason, or select the response most advantageous to MWDOC. MWDOC reserves the right, at any time prior to commencement of the Project, to delay or discontinue this Project.
3. Respondent may modify or amend its qualifications only if MWDOC receives amendment prior to the deadline stated herein for receiving qualifications.
4. 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 qualifications.
5. The submitted qualifications may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the qualifications.
6. MWDOC will not be responsible for submittals that are delinquent, lost, miss-marked, and sent to an address other than that given herein, or sent by mail or courier service and not signed for by MWDOC.
7. Respondent shall name a Project Manager for these services that will coordinate all activities with MWDOC.

Qualification Format

1. Respondent's qualifications shall be clear, accurate, and comprehensive. Excessive or irrelevant materials will not be favorably received. Please include samples of similar creative work for public sector clients. In order to ensure submission of a complete qualifications packet, Respondents are encouraged to use the Checklist in preparing their qualifications.
2. A cost proposal shall be submitted following Exhibit C in a sealed envelope with the qualifications.

3. Qualifications shall be in an electronic format as well as a printed copy. Qualifications shall be organized, tabbed, and numbered in the order presented below:
 - A. Qualifications Transmittal Cover Letter
 - B. Executive Summary
 - C. Approach (Items 1-6)
 - D. Experience (Items 1-3)
 - E. References (Items 1-2)
 - F. Required Attachments
 - Exhibit A – Business Statement
 - Respondents Participation Form
 - G. Cost Proposal – Submit one cost proposal following Exhibit C in a sealed envelope
4. Qualifications and submittal materials shall be enclosed in a sealed package. Respondent's name and address shall appear in the upper left-hand corner of the package. If more than one package is submitted, each package shall be legibly numbered below the name of Respondent, i.e., Package 1 of 3 through 3 of 3 as required.
5. Qualifications will be received until **4:00 p.m. on March 21, 2014**. Qualifications received after this time and date will be returned unopened.
6. Respondent shall submit **three hard copies** of the qualifications packet as well as an electronic copy to MWDOC at the address listed below. No emails or faxes will be accepted.

By Mail:

Municipal Water District of Orange County
 PO Box 20895
 Fountain Valley, California 92728

Attn.: Darcy M. Burke
 Director of Public Affairs

RE: RFQ 596 – Professional
 Communications Services

In Person or by Courier:

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

Attn.: Darcy M. Burke
 Director of Public Affairs

RE: RFQ 596 – Professional
 Communications Services

BUSINESS STATEMENT

This form must be completed and signed by the Respondent and each subcontractor proposed to participate in this award. Attach additional copies of this form as required.

Company Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____ Fax No.: _____

Email address: _____

Contact Person's Name: _____

Telephone No.: _____ Fax No.: _____

Email address: _____

Business License No.: _____ City: _____

State: _____ Expiration Date: _____

Federal ID no. or Social Security No.: _____

Contract Manager's Name _____

Telephone No.: _____ Fax No.: _____

Mailing address _____

Type of organization: (check all that apply)

- Corporation, under the laws of the State of: _____
- Individual
- Joint Venture
- Municipal, State, or Federal
- S Corporation
- General partnership Limited partnership
- Non-profit corporation
- Small Business Enterprise: A business enterprise that is independently owned and operated; organized for profit; is not dominant in its field; and meets the criteria set forth by the Small Business Administration in Title 13, Code of Federal Regulations, Part 121.

Company representative authorized to sign contracts.

Name	Official Capacity	Telephone

Potential Conflicts of Interests Summary

All Respondents and proposed Sub-Respondents must respond to each of the following questions to determine if any actual or perceived conflict of interests may exist. If any response has a “yes” answer, the supporting questions must also be answered completely and accurately in full detail to identify any potential or actual conflicts of interests, including organizational conflicts, bias, and unfair competitive advantages. MWDOC reserves the right to review and make a final determination regarding whether any actual or potential conflicts of interests would violate MWDOC’s procurement and ethics policies, and thus preclude a respondent’s participation in this award.

1. To the best of your knowledge, have you or any of your team member(s) ever been employed or retained by MWDOC? [Yes] or [No]. If your answer is “Yes,” please provide the following additional information (attach additional sheets as needed):
 - Name of individual: _____
 - Title/position within your company: _____
 - Was the individual a MWDOC full-time employee? [Yes] [No]
 - Part-time employee? [Yes] [No]
 - As-needed employee? [Yes] [No]
 - Retained Respondent? [Yes] [No]
 - Or, other? Please explain: _____
 - Dates of employment/engagement with MWDOC: __
 - MWDOC department(s)/area(s) worked: _____
 - Name of MWDOC supervisor: _
 - Description of job duties and responsibilities for each MWDOC position held:

2. To the best of your knowledge, are any present or former MWDOC employees or Board members, or immediate relatives of any present or former MWDOC employees or Board members, currently serving as officers, partners, or shareholders in your company? [Yes] or [No]. If the answer is “Yes,” please provide the following additional information as (attach additional sheets as needed):
 - Name of individual: _____
 - Title/position within your company:
 - Percentage of ownership of company shares: _____

3. To the best of your knowledge, are any of your former employees or officers currently employed or retained by MWDOC? [Yes] or [No]. If your answer is "Yes," please provide the following additional information (attach additional sheets as needed):
- Name of individual: _____
 - Title/position within your company:
 - Description of job duties within your company: _____
 - Dates of employment/service within your company:
4. In the preceding twelve months, have you, your company, or any employee or officer made, arranged, or delivered any gifts (including entertainment) to any MWDOC Board member? [Yes] or [No]. If the answer is "Yes," please provide the following additional information as (attach additional sheets as needed):
- Name of MWDOC Board Member receiving gift: _____
 - Value of the gift:
 - Description of the gift: _____
 - Date that gift was delivered: _____

I declare under penalty of perjury of the laws of the State of California that the foregoing is true and correct.

Name (Type or print)

Name (Signature)

Title

Date

**CHECKLIST
RFQ No. 596**

The following checklist is offered as an aid to ensure Respondent has included all RFQ requirements prior to submittal of the qualifications packet. Respondent shall submit **three (3) hard copies** of the qualifications packet.

Qualifications Transmittal Cover Letter

Part I Executive Summary:

- Summary of Respondent's qualifications and experience to perform the required services.

Part II Approach:

- Narrative discussion of why Respondent is especially qualified to perform services described in this RFQ.
- Description of how the Respondent will develop Question Guide.
- Description of how the Respondent will conduct Focus Groups and what target audiences are recommended.
- Description of how the Respondent will develop and provide related creative materials.
- Description of relevant Subject Matter Expertise.
- Project Timeline.
- Project Budget.

Part III Experience:

- Provide resumes and relevant Respondent and team experience.
- Provide organization chart.
- Demonstrated knowledge and experience in providing the required services.

Part IV References:

- Provide three **to five** client references from different sources for work performed within the last five years similar in size and scope.
- List the most current projects first by name, title, organization, address, telephone numbers, email addresses, completion dates and total costs of completed projects from projects listed above.

Part V Required Attachments:

- Exhibit A: Business Statement and Respondents Participation Form

Part VI Cost Proposal:

- Submit one cost proposal, using Exhibit C, in a sealed envelope.

Task 4 Subject Matter Expertise

Staff Member and Title	No. of Hours	Hourly Rate	Cost per Staff Member
Total			

Task 5 Creative Materials Development

Staff Member and Title	No. of Hours	Hourly Rate	Cost per Staff Member
Total			

Task 6 Final Report

Total Cost

Total Services Cost

Evaluation Criteria
RFQ No. 596

Evaluation Criteria	Weight
1. Experience	20
2. Approach	20
3. Education	20
4. Budget	20
5. Team	10
6. References	10
TOTAL SCORE POSSIBLE	100