



**Municipal Water District of Orange County**

**REQUEST FOR PROPOSAL (RFP)**

**For**

**Professional Services**

**For**

**Assistance with Completion and Submission of Lead and Copper Rule Revisions**

**Service Line Inventories for a number of Orange County Agencies**

**RFP ENG. 2023-01**

**Final Questions for clarification by email only are due by July 17, 2023.**

**Proposals will be received until 3:00pm July 26, 2023.**

**Electronic Submittals must be less than 25 Megabytes (MB)**

Professional Services for assistance with completion and submission of Lead and Copper Rule  
Revisions

Service Line Inventories

**REQUEST FOR PROPOSAL (RFP)**

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## Introduction

### Who We Are

The Municipal Water District of Orange County (hereinafter referred to as “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 Metropolitan Water District of Southern California (Metropolitan) and other sources to meet present and future needs, at an equitable and economical cost, and to promote water use efficiency for Orange County. MWDOC efforts are focused on sound planning and appropriate investment in water supply reliability, regional delivery infrastructure, water use efficiency programs, and emergency preparedness. MWDOC, headquartered in Fountain Valley, is governed by a seven-member elected Board of Directors, with each Board member representing a specific division of the County.

Local water supplies meet nearly two-thirds of Orange County’s total water demand. To meet the remaining demand, MWDOC purchases imported water – from Northern California and the Colorado River – through the Metropolitan Water District of Southern California (Metropolitan). MWDOC, as a Metropolitan Member Agency, delivers this water to 27 member agencies (local water agencies and city water departments), which provide retail water services to the public. The population served is approximately 3.1 million consumers in a 600 square mile area.

### Invitation for Proposals

Municipal Water District of Orange County (MWDOC) invites your firm to submit a proposal for assistance with the completion and submission of US EPA Lead and Copper Rule Revisions (LCRR) Service Line Inventories (SLIs) for a number of retail agencies in Orange County.

MWDOC and the interested Orange County water agencies are exploring this joint effort for its potential in saving cost and time through economies of scale. At this time, we estimate that a number of Orange County retail water agencies will participate in a coordinated effort to hire a consultant for assistance with completion and submission of their SLIs. A list of the potential agencies is included in **Attachment A** (list of OC agencies indicating interest in participating in this effort). The actual number of agencies participating will depend on the economies of scale and each agency’s alternatives for completing their LCRR compliance requirements. Your proposal should address providing various levels of assistance (and agreed upon levels of effort) for the completion and submission of as few as **eight** agencies compliance requirements and as many as **fifteen** agencies. The number of water system connections at these agencies varies from 1,204 to 64,166 connections.

Note: Few lead service lines have been identified in Southern California. The scope of this effort is well characterized by the following two statements from the document Water Industry Guidance For Completing Inventory Requirements Of The Federal Lead And Copper Rule Revisions – March 2023:

- “The LCRR assumes every state has at least some lead service lines (LSLs). However, on the utility side of the meter in California, there are more than 11 million service lines, and only four known to be lead are in use.”
- “The difficulty of completing inventorying requirements in California will be to prove the absence of LSLs. Given this dynamic, it is important for California water systems to be able to

utilize appropriate survey and statistical methodologies to complete an inventory of their unique service area.”

A review team comprised of MWDOC and participating agency staff will review the proposals and select a preferred consultant based upon the review criteria established. An interview may or may not be requested depending on the review of the proposals and the ranking of the consultants. Upon completion of the proposal review, potential participating agencies would then be asked to indicate whether they are going to participate or not, and a project budget would be established with the selected consultant based upon the scope of services, fee schedule submitted, number of the participating agencies and any final negotiations. **The contract would be administered through MWDOC.** The main agreement will be between MWDOC and the Consultant. The Consultant’s invoices will be sent to MWDOC for processing and payment. MWDOC will have agreements with the OC agencies separately from the Consultant agreement.

Enclosed is a Scope of Work (**Attachment B** hereto) which describes the menu of tasks requested to assist with fulfilling agency’s LCRR SLI compliance requirements. You are hereby invited to submit a proposal that follows **Attachment B** subject to the following requirements:

1. Your proposal, shall at minimum, address the various work items described in **Attachment B - “Scope of Work.”** Note each agency will likely choose a subset of the task categories listed in the table below. As each agency’s situation is unique, Consultant shall also include in their proposal a Time & Materials (T&M) labor rate schedule to handle unanticipated related work that doesn’t fit neatly into the lump sum categories.
2. The “Scope of Work” is considered to be the general extent of the SLI services needed by the interested agencies. If you feel additional services may be needed for OC agencies to complete their SLIs, please add the additional items to the table below.
3. Consultants shall provide detailed budgets for completion of SLIs per the menu of services shown below and in **Attachment A.** As the extent of effort for completing each category task item will vary between agencies (and the actual level of effort may not be fully determined at the start of the scope of work), each proposal shall contain cost breakdowns based upon three levels of effort required (low, medium and high). Consultants shall describe the assumptions used for each of the levels of effort (low, medium, and high) in their proposals. **Prior to final agreement with each agency; MWDOC, the agency, and the consultant will meet to agree upon the level of effort for each category of service.** Upon commencement of the scope of work, the consultant shall complete a level of effort assessment based upon their findings of the condition and availability of existing records at each agency. Should the actual level of effort differ significantly from the original agreed to level of effort; or if during the course of the scope of work, the consultant determines the level of effort is going to significantly exceed the agreed to level of effort, the consultant will immediately notify MWDOC. MWDOC will coordinate a meeting between the agency and consultant to come to mutual agreement on a change to that category’s level of effort, or whether the consultant is to stop work on the task item. If you believe a different breakdown of services is called for in completing the SLIs, feel free to outline your recommended menu of services for agencies to choose from. The detailed services proposal shall include fee schedules and a breakdown of the fee by task, project team members,



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subcontractors, and other direct costs. The Budget Summary submittal, to be included in the Consultant's Proposal, shall be in the following form:

Budget Summary Proposal		
Cost Per Category of Service		
Category	Level of Effort	Cost Savings (per Agency) for 12+ Agency Agreements *
* The Cost Savings for 12+ agency agreements will be determined by the final tally of agencies indicating their participation by October 1, 2023. Should less than 12 agencies choose assistance in a specific category, then the cost savings will not be applied for that service.		
1. Project Administration and Progress Reporting (Required Task for all Agencies)	\$_____ High \$_____ Med \$_____ Low	_____ %
2. Assistance with Data Gathering, Records Review, and Historical Code Review	\$_____ High \$_____ Med \$_____ Low	_____ %
3. Develop Lead Service Line Inventory Database and Initial Inventory	\$_____ High \$_____ Med \$_____ Low	_____ %
4. Develop Approach for Alternative Material Verification Methods and submit to Division of Drinking Water (DDW) for Approval	\$_____ High \$_____ Med \$_____ Low	_____ %
5. Apply Division of Drinking Water (DDW) Approved Alternative Verification Methods		
6. Assistance with Data Analysis	\$_____ High \$_____ Med \$_____ Low	_____ %
7. Customer Communications	\$_____ High \$_____ Med \$_____ Low	_____ %



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8. Develop and Implement Private Property Owner Self-Verifications	\$_____ High \$_____ Med \$_____ Low	_____ %
9. Develop Lead Service Line Replacement Plan	\$_____ High \$_____ Med \$_____ Low	_____ %
10. Manage (Field) Inspections/Test Pitting/Meter Inspections	\$_____ High \$_____ Med \$_____ Low	_____ %
11. Provide field inspection personnel to assist with physical visual verifications	\$_____ Hr. Rate	_____ %
12. Population of DDW Inventory Template and Service Line Inventory Submission	\$_____ High \$_____ Med \$_____ Low	_____ %
<b>Additional Services</b>		
1. Integrate Service Line Inventory into Agency Asset Management System	Separate Agreement	
2. School/Childcare Facility Sample Site Selection and SOP	Separate Agreement	
3. Compliance Site Selection and SOP	Separate Agreement	
4.		

4. Disclose any proposed subcontract arrangements that would be utilized during this project.
5. Describe your firm's specific experience and the capabilities of the designated project manager, project engineers/technical staff, and support staff related to the outlined Scope of Work. Describe the capacities of your firm and any subcontractors to complete the SLIs for all participating agencies within budget and on schedule. Include a schedule showing the percentage of time each member will contribute to the project. Key personnel assigned to the project shall not be reassigned without prior contract manager approval.
6. Describe the project team's [not the firm's] past record of performance on similar projects for which your firm has provided services. Include a discussion of such factors as quality of work,



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ability to work well with multiple project participants, control of costs and ability to meet schedules. Include agency references that may be contacted by members of the review panel or MWDOC.

7. Provide an assurance of the firm's ability, considering the firm's current and planned workload, to complete SLIs for each participating agency on time for the following milestones:
  - Notice to Proceed – October 30, 2023
  - SLI completion and Inventory submission to the State – On or before October 1, 2024.

\*\*\*Please note that MWDOC understands there may be changes caused by the pending release of the Lead and Copper Rule Improvements. We are willing to work with the Consultant and the OC agencies based upon how those rule changes develop.

8. Document that personal or organizational conflicts of interest prohibited by law do not exist. Note conflicts as they may relate to both MWDOC and any potentially participating interested OC agency.
9. A sample copy of MWDOC's professional services agreement is attached (**Attachment C**). Please state in your proposal your willingness to accept the agreement terms and conditions. If you require any changes, please include in your proposal any proposed modifications to the standard terms and conditions. While MWDOC negotiates such changes with consultants, MWDOC will consider your proposed modifications during the consultant selection and retains the right to reject any portion of your proposed modifications.

Criteria for Selection of Consultant shall be based on, but not limited to:

- Proposal contents and responsiveness
- A demonstration of a clear understanding of the required scope of work
- A work plan to successfully complete the engagement on time
- Prior experience of the firm, and specific experience and capability of the designated project manager and support staff
- After the qualifications of all firms have been evaluated, price shall be considered in the selection process for all qualified firms
- The firm, and in particular the project manager, must be fully capable in all areas outlined under the "Scope of Work."

Based upon this information, a committee formed from the participating agencies and MWDOC staff will recommend a firm to MWDOC's Board of Directors for award of the professional services agreement.

This request does not commit MWDOC to retain any consultants, to pay costs incurred in the preparation of proposals, or to proceed with the project. MWDOC reserves the right to reject any or all proposals and to negotiate with any qualified applicant.

Proposals (including accompanying materials) will become the property of MWDOC. Proposals will be held in confidence to the extent permitted by law. After award of a contract or after rejection of all proposals, the proposals will be public records subject to disclosure under the California Public Records Act (Government Code Section 6250 et seq.)



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MWDOC reserves the right to request additional information from prospective consultants prior to final selection and to consider information about a firm other than that submitted in the proposal.

Proposals will be accepted until July 26, 2023 at 3:00 pm. The electronic copy should be sent to [cbusslinger@mwdoc.com](mailto:cbusslinger@mwdoc.com).

PLEASE NOTE – KEEP THE SIZE OF THE ELECTRONIC COPY LESS THAN 25 MEGABYTES TO ALLOW EMAILING (APPROXIMATELY 35 PAGES OF TEXT AND GRAPHICS). FAILURE TO MEET THIS REQUIREMENT WILL BE GROUNDS FOR REJECTION OF YOUR PROPOSAL!

**Attachments:**

- A. List of Interested Orange County Agencies
- B. Scope of Work
- C. Standard MWDOC Professional Services Agreement (attached separately)
- D. Schedule for Issuance of RFP and Contract for Assistance with Completion and Submission of Lead and Copper Rule Revisions Service Line Inventories for a number of Orange County Agencies





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### Attachment A

#### List of Interested Orange County Agencies for Completion and Submission of LCRR Service Line Inventories

Agency		
		Service Connections
1	City of Anaheim	64,166
2	City of Brea	13,821
3	City of Fountain Valley	17,171
4	City of Fullerton	31,936
5	City of Huntington Beach	55,028
6	City of La Palma	4,382
7	City of Orange	35,417
8	City of Santa Ana	45,037
9	City of Seal Beach	5,350
10	City of Tustin	14,341
11	City of Westminster	20,755
12	East Orange County Water District	1,204
13	El Toro Water District	9,500
14	Laguna Beach County Water District	8,703
15	Serrano Water District	2,269
16	South Coast Water District	12,562
17	Trabuco Canyon Water District	4,118



## Attachment B

### SCOPE OF SERVICES

#### FOR

#### ASSISTANCE WITH COMPLETION AND SUBMISSION OF LCRR LEAD SERVICE LINE INVENTORIES

### INTRODUCTION

On January 15, 2021, the United States Environmental Protection Agency (US EPA) published revisions to the Lead and Copper Rule known as the Lead Copper Rule Revisions (LCRR). Through the LCRR, US EPA requires all community water systems to conduct a comprehensive inventory of both publicly owned and privately owned service line materials “regardless of ownership”. The LCRR requires water systems to identify any lead, galvanized steel pipe requiring replacement (GRR), or “lead status unknown” service lines and to make the inventory information publicly available (water systems that serve more than 50,000 people to provide their inventory online - 40 CFR §141.84(a)(8)). The initial inventory requirements of the LCRR specify:

- Information water systems must include in their service line inventory,
- When water systems must submit their initial inventories to their primacy agency (State of California) - October 16, 2024.
- Requirements for water systems to make their information publicly accessible and to notify all persons served by the water system with a lead, GRR, or lead status unknown service line.

The following is a scope of services for requested services.

\*\*\* The Consultant shall be responsible for all of the work the Consultant performs under all agency selected categories. The Consultant will also be responsible for any follow-up work required in the event that DDW does not find the Consultant’s portion of the inventory to be acceptable (Non-compliance), or in the event DDW requires changes to the portion of the inventory under the Consultant’s responsibility. The Consultant will respond/revise the Consultant’s portion of the inventory to the satisfaction of the agency and DDW within 30 days of receiving comments from DDW. \*\*\*

**Note: Each agency will provide a summary of available records with samples for the inventory prior to the meeting with the consultant to agree upon the level of effort for each category of service:**

Existing Type of Record	Describe Records (and Condition) available to complete your Agency’s Inventory
1. Construction Records and Plumbing Codes	
2. Water System Records	
3. Distribution System Inspections and Records	
4. Other Records	

**1) Project Administration and Progress Reporting (Required Task for all Agencies)**

- Communication – includes communications with retail water agency, and MWDOC for both internal and public communications on project issues and project status.
- Data collection and management – collection and processing of agency provided data as well as from other sources (City and/or County).
- Meetings and Travel – budget for a minimum of 6 meetings including;
  - Meeting to agree on the level of effort,
  - kick off meeting,
  - meeting to transfer institutional knowledge and experience related to service connections,
  - 2 progress meetings, and
  - final preparation meeting prior to inventory submission to DDW.
- Invoicing and administration – Includes invoicing and creation of progress reports/maps to document project progress for internal agency and public uses.

**2) Assistance with Data Gathering, Records Review, and Historical Code Review**

- Provide assistance in gathering, organizing, and entering data into the inventory database following the guidance from both US EPA and DDW (either created by the Consultant or by the water system). The extent of work for this item is highly dependent on the condition and accessibility of existing records and files. Consultant and Agency to meet and agree on the level of effort involved for this task.
- Data gathering may include, but is not limited to, activities such as:
  - Reviewing Construction Records and building permits,
  - Reviewing historical plumbing and building codes and ordinances to determine lead pipe prohibition dates,
  - Reviewing water system records including meter or water service installation records (tap cards), capital improvement records, and inspection records,
  - Researching building ages,
- Map all records and associate all data to specific water meters or customer addresses, including entering source documentation verification files for possible future audits.

**3) Develop Lead Service Line Inventory Database and Initial Inventory**

- Develop a Lead Service Line Inventory (LSLI) database of every water service line connection in each water system which includes all US EPA and California Division of Drinking Water (DDW) required information regarding LCRR Service Line Inventory compliance. The database can be a GIS database or spreadsheet (as determined by the agency). Regardless of format, the database shall include the ability to track and include the records used to identify the material of each portion of the service line (e.g., plumbing code or water system record) in the inventory. If the

agency chosen format is a spreadsheet, the spreadsheet shall include the ability to pull georeferenced information to produce a map of the service lines for the entire service area.

- Each service line will have separate entries for pipe material on the water system and property owner sides of the water meter. The database will include the ability to store all service line inventory verification documentation in multiple file type formats (i.e., document images, PDFs, pictures, customer self-test results, lab results, and field crew documentation for possible future US EPA audit). The database is intended to be updated on a continual basis as modifications to the water system and regulatory requirements occur. Database capabilities will include georeferencing for map creation with address search features for on-line presentation of inventory findings to the public and for water system owner/operator use, storage of multiple verification documentation files in numerous file formats (including photographic and image capture file types), and compatibility with multiple database platforms.
- The database in this task will be populated using readily available water system information including customer information, meter information, water main installation date, parcel construction date, pipe material for the water system side of the service line, service line size, and building/residence occupancy or completion data from the relevant City or County (i.e., Initial Inventory). This information will be provided by the agency.
- Provide a preliminary inventory map with data gaps for both internal uses, and for on-line public display of inventory status.

#### **4) Develop Approach for Alternative Material Verification Methods and submit to Division of Drinking Water (DDW) for Approval**

- Develop plan(s) and obtain DDW pre-approval for alternative methods of verification as appropriate to effectively evaluate the accuracy of service line records and/or predict service line materials. Conversations with DDW indicate they are currently responding to requests for pre-authorization of alternative methods of verification within 2 weeks of receipt of request (this response time may change).
  - Provide Agency with pre-approval verification notification(s) from DDW for all alternative methods of verification prior to commencing analysis work. Note: DDW has indicated the Michigan Drinking Water and Environmental Health Division's Minimum Service Line Material Verification Requirements provides a basis for DDW verification method approval [Michigan Method of Service Line Material Verification](#).
  - DDW has also stated that California requires randomized samples sizes sufficient to reach a minimum 95% confidence level applied to each decade of service line installation for all verification methods.

#### **5) Apply Division of Drinking Water (DDW) Approved Alternative Verification Methods**

- Apply DDW approved alternative verification methodology to water agency data set early enough in the inventory process to allow sufficient time for additional work, as needed prior to the submission deadline.

**6) Assistance with Data Analysis**

- Analyze data using US EPA and DDW approved methods and approved alternative methods of verification. Add analysis results to the initial inventory. **Pipelines are to be identified by actual pipe material (i.e., not simply ‘Non-Lead’)**
- Provide an updated inventory map for both internal uses, and for web-enabled public display of inventory status.

**7) Customer Communications**

- Develop and implement a communications outreach campaign to schedule identified ‘gap’ locations for private property owner self-verification and/or agency field verification.
- Establish and coordinate all communications deliverables (project notifications, private property owner surveys, agreements, etc.) to businesses, residents, and property owners.

**8) Develop and Implement Private Property Owner Self-Verifications**

- Manage logistics of private property owner self-verification test kits, outbound & inbound commercial and residential support, document all feedback and verification results into the database, and communicate all findings to the water agency.
- Options for Customer-Owned Self-Verifications to be chosen by water agency including:
  - Customer Surveys
  - Lead Check Swabs– including development and use of a customer survey for submission of swab results along with photo verifications as recommended by US EPA.
  - Special Purpose Sampling (must be pre-approved by DDW)

**9) Develop Lead Service Line Replacement Plan**

- Develop a Lead Service Line Replacement plan in consultation with each water agency. The plan will take into account capital and time constraints, existing/ongoing replacement projects, and underserved/ underrepresented neighborhoods.

**10) Manage (Field) Inspections/Test Pitting/Meter Inspections**

- Manage all customer education, support, permission gathering, and data capture as necessary. All customer activities will be logged into the database or inventory.
- Conduct physical inspection of existing water meters to determine customer and water system pipe materials. For bidding purposes, assume that piping will be inspected by removing the water meter cover and using hand tools to expose the pipe material.
- Disposable field test kits may be necessary if the Consultant is unable to conclusively determine the pipe material type visually.
- Consultant shall collect photographs of each pipe material exposed and any tests conducted during this task.

**11) Provide field inspection personnel to assist with physical visual verifications**

- Provide field personnel who are trained to locate and identify pipe materials to supplement existing agency staff in the completion of field investigations of service line materials.
- Consultant and agency will negotiate and agree to the numbers of hours of supplemental field personnel needed based upon an agreed estimate of hours per field investigation and hourly rate provided. Indicate any discounts for agencies requiring significant number of hours of assistance with field investigations.

**12) Population of DDW Inventory Template and Service Line Inventory Submission**

- DDW is developing a submission process that will require the population of DDW Inventory Templates (currently DDW template submission is considered optional). Prepare and submit the DDW inventory template prior to **October 1, 2024**. **Note: DDW has indicated that submissions should take into account additional time for re-work.**

**Additional Services****1) Integrate Service Line Inventory into Agency Asset Management System**

- Assist agency with integration of inventory database with the agency's asset management system.
- **The exact scope of this task is to be negotiated between the agency and the Consultant with the scope of services to be agreed to in an agreement that is separate from this multi-agency agreement.**

**2) School/Childcare Facility Sample Site Selection and SOP**

- Develop and provide management of all data for school sampling programs, including school location and demographic data, fixture maps, sample plans, sample tracking, results reporting, remediation recommendations and actions, and public facing results dashboards.
- **The exact scope of this task is to be negotiated between the agency and the Consultant with the scope of services to be agreed to in an agreement that is separate from this multi-agency agreement.**

**3) Compliance Site Selection and SOP**

- Develop and provide end-to-end compliance workflow for all required LCR sampling. This may include providing 1st and 5th Liter kits, tracking of delivery kits to residents, providing forwarding labels for sample delivery to a certified lab, and incorporating results data into the database.
- **The exact scope of this task is to be negotiated between the agency and the Consultant with the scope of services to be agreed to in an agreement that is separate from this multi-agency agreement.**



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## **Attachment C**

MWDOC Professional Service Agreement – SEPARATE ATTACHMENT



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## Attachment D

### Schedule of Events

Task Item	Anticipated Dates
1. Issue RFP	Jun. 20, 2023
2. Closing date for submittal of comments and questions on RFP	Jul. 17, 2023
3. Proposals Due	Jul. 26, 2023
4. Selection Committee meets to review and select consultant (process may vary due to the number, quality, and pricing of proposals)	Aug. 16, 2023
5. Notice to Agencies regarding SLI services selections, pricing and request for final confirmation regarding retail agency commitments	Aug.17, 2023
6. Recommendation to MWDOC's P&O Committee	Sep. 5, 2023
7. MWDOC Board Consideration of Authorization	Sep. 20, 2023
8. Complete Agreements between MWDOC and Interested Agencies	Oct. 2023
9. Notices to Proceed (First Come, First Served)	Oct. 2023
10. Submit DDW Inventory Template to DDW	Oct. 1, 2024