

SOUTHERN CALIFORNIA STORMWATER MONITORING COALITION

REQUEST FOR PROPOSALS

PROJECT: STREAMLINING ANNUAL REPORTING

SECTION 1. INSTRUCTIONS TO BIDDERS

Three (3) copies of the bidder's complete proposal to provide the services detailed herein are to be enclosed in a sealed envelope marked " Streamlining Annual Reporting Project " and addressed to:

Bryan Nece, Administrative Officer
Southern California Coastal Water Research Project (SCCWRP)
3535 Harbor Blvd., Suite 110
Costa Mesa, CA 92626

Emailed proposals will not be accepted. All supplemental materials requested within this proposal must be attached to the Proposal. Any unauthorized conditions, limitations, or provisions attached to this proposal may be cause for rejection.

Sealed bids will be received at SCCWRP's offices, 3535 Harbor Blvd., Suite 110, Costa Mesa, CA 92626, up to the hour of 11:00 AM on October 21, 2020, at which time, the Administrative Officer will open the bids. Bids received by facsimile will not be accepted.

All bidders should inform SCCWRP via email (bryann@sccwrp.org) or letter mail by October 2, 2020 of their intention to submit a bid. The notification is not mandatory, but is necessary to receive future updates to this bid notification. SCCWRP will hold a non-mandatory bidders meeting at 11:00 AM on October 2, 2020 via teleconference/Zoom. To attend this meeting, you must register in advance at:

https://us02web.zoom.us/meeting/register/tZYvc--qgz0jHNDqOQ_Oxeld4PJOGuzO5FnD

After registering, you will receive a confirmation email containing information about joining the meeting.

This meeting is intended to provide bidders the opportunity to ask questions and request clarifications about this document. Bidders who are unable to attend may provide written requests for clarification prior to the meeting. SCCWRP's response to both written and oral questions will be sent to the bidders by email and posted on the SCCWRP web site (www.sccwrp.org).

This solicitation for proposals shall not be construed as obligating SMC or SCCWRP to award a contract or to pay any compensation for the information solicited.

Minimum Requirements

- A minimum of ten years of experience and expertise in data management and data visualization including computer programming, geographical information systems (GIS), statistical analysis and graphing, and creating user-friendly web portals/interfaces.
- A minimum of five years of experience with California stormwater programs including a working knowledge of MS4 permit requirements and their relationship to the successful preparation and timely submittal of Annual Reports
- Demonstrated success leading advisory committees with diverse interests to create consensus around challenging issues

SECTION 2. BACKGROUND

The [Southern California Stormwater Monitoring Coalition](#) (SMC) is a multi-agency organization composed of the region's Phase I municipal stormwater NPDES lead permittees, California Department of Transportation stormwater NPDES permittee, the State of California regulatory agencies that grant the NPDES permits, and SCCWRP. The SMC is formed through a cooperative agreement. The current list of SMC members includes:

- County of Los Angeles, Department of Public Works
- County of Orange, OC Public Works
- County of San Diego, Department of Public Works
- Riverside County Flood Control and Water Conservation District
- San Bernardino County Flood Control District
- Ventura County Watershed Protection District
- City of Long Beach Public Works Department
- City of Los Angeles, Department of Public Works
- California Regional Water Quality Control Board, Santa Los Angeles, CA
- California Regional Water Quality Control Board, Los Angeles Region
- California Regional Water Quality Control Board, San Diego Region
- State Water Resources Control Board
- California Department of Transportation
- Southern California Coastal Water Research Project

The mission of the SMC is to solve regional stormwater management challenges across southern California by building management regional consensus around best-practices in-class tools, methods and monitoring strategies

The SMC is managed by an Executive Committee. The Executive Committee has asked SCCWRP to be their Treasurer and administer all of their grants and contracts. SCCWRP, in conjunction with a SMC designated project manager, will be administering this RFP, and subsequent contract to conduct this scope of work. The contractor will work with a SMC focus group, specifically created for this project, to provide ideas, feedback and comments, and approval of all work products.

SECTION 3. SCOPE OF WORK

Introduction:

Although SMC member agencies spend hundreds to thousands of person-hours each year to produce “annual reports” as a compliance requirement, there is little or inconsistent guidance for reporting these compliance requirements. As a result, annual reports are often difficult to read and understand, are almost always comprised of non-machine-readable data, typically voluminous, and rarely get used beyond their one-time specific application. Both regulated and regulatory agencies are left with a feeling of wasted effort, incomplete outcomes, overly scoped and drafted report formats, and lost opportunities to glean more focused information and direct insight of program results. Because both regulated and regulatory agencies are members of the SMC, there is an opportunity to dramatically streamline guidance for annual reporting, focusing on performance metrics that provide the key information for decision-making and assessing program progress or successes, easily demonstrates completion of permit-mandated requirements, provisions and activities, and facilitate the reports’ production such that it can be accepted as the standardized format using an automated, seamless, and transparent process.

This project will accomplish three objectives: 1) identify key metrics that are the essence of program effectiveness, 2) create a data platform for incorporating the data necessary to track and calculate the key metrics, and 3) generate a user interface for quickly and efficiently automating the Annual Report using the key metrics as the focal point of the report format. In addition, the project should be flexible enough to allow for watershed/program specific programs, TMDL provisions, and other added enhanced activities included as permit requirements. Ultimately, the intent of this project is to streamline the Annual Reporting for each SMC member agency while producing more actionable information.

To accomplish these objectives, the scope of work will require six tasks as described below.

Task 1: Create a Focus Group

The contractor shall form a Focus Group to help plan, implement, and review the project. The Focus Group shall be comprised of representatives from both regulated and regulatory SMC member agencies, although additional members such as non-governmental organizations may be considered. SMC member engagement will be critical to ensure that the streamlined reporting will be meaningful to SMC member agency decision making.

Deliverables: SMC Focus Group membership list;
Facilitate Focus Group meetings (conducted either in person or virtually) to initiate planning or design concepts, update each task’s

progress, and receive comments and/or approval on the any draft work products including annual report formats;
Meeting minutes documenting decisions and action items

Task 2: Review Current Annual Reports

As a first step in producing a streamlined annual report, the contractor should inventory what is documented in existing SMC member Annual Reports. This inventory will serve as the starting point for what currently exists, where SMC members are similar or different, and what valuable information the prevailing efforts currently provide.

Deliverable: Technical Memo documenting the inventory of similarities and differences among existing SMC member agency Annual and monitoring reports.

Task 3: Identify what key metrics should be used for assessing compliance among all SMC member agencies

The contractor shall utilize the Focus Group to create a series of key metrics – graphs, tables, narrative summaries, data analyses, and alike – that best visualize a stormwater agency’s performance. These metrics can be based on monitoring data, but not exclusively. For example, other key metrics might include progress on mandatory minimum control measures, implementation schedules, public education, narrative or numeric goals, etc. The key metrics need not be written into existing permits. For each key metric, the contractor shall describe how it uniquely defines program performance, and what stormwater managers in the SMC shall do in response to the information provided.

Deliverables: List of key metrics identified by the Focus Group and approved by SMC Steering Committee

Task 4: Create a data platform for incorporating the data to calculate the key metrics

Once the key metrics are identified, then the contractor shall create a data platform or portal for compiling the necessary data to summarize and report the key metrics. The data platform will utilize publicly available standardized data formats so information can be easily uploaded, downloaded, shared, and utilized for automated data calculations. Current platforms do exist that could be used as examples, or appended to create implementation efficiencies (e.g., SMC Bioassessment data portal). The platform(s) shall provide data structures, nomenclature, pick lists, and automated data checkers for quality assurance, at a minimum. The contractor shall also create the data processing and visualization subroutines on the portal. These subroutines shall generate the

graphs/tables/narratives of the key metrics derived from Task 3 automatically, conceptually at the touch of a button.

Deliverables: Data platform template (i.e., empty database);
Data upload/download training tools;
User interface, with documentation.

Task 5: Pilot test the streamlined Annual Report web interface

The contractor will test the data system to ensure it works seamlessly by having at least two SMC member agencies upload their data in the necessary format using data templates, go through the QA process to ensure data quality and formatting, and then generate the key metrics (i.e., graphs, tables, narrative summaries, data analyses, and alike) that will comprise the member agency Annual Report. This step, if successful, will facilitate the improvements to make the prototype tool readily useful and useable. The web interface shall be browser independent.

Deliverables: Technical memo summarizing Pilot test implementation success and failures, and recommendations for improving the streamlined Annual Report web interface

Task 6: Use the Focus Group to refine the new Annual Report format

The contractor shall engage the Focus Group to ensure the products generated by the pilot study are acceptable for Annual Reporting. The Focus Group may desire improvements in the technical data management components, or alter/improve the data reporting, or desire additional key metrics.

Deliverables: Joint Report from the contractor and Focus Group to the Steering Committee recommending the new Annual Reporting format

Schedule

This project will require 42 months to complete from project award and initiation.

Task	Deliverable	Due Date (from project start)
Task 1: Create a Focus Group	SMC Focus Group membership list; Facilitate Focus Group meetings (conducted either in person or virtually) to initiate planning or design concepts, update each task's progress, and receive comments and/or approval on the any draft work products including annual report formats; Meeting minutes documenting decisions and action items	3 months
Task 2: Review Current Annual Reports	Technical Memo documenting the inventory of similarities and differences among existing SMC member agency Annual Reports	6 months
Task 3: Identify what key metrics should be used for assessing compliance among all SMC member agencies	List of key metrics identified by the Focus Group and approved by SMC Steering Committee	15 months
Task 4: Create a data platform for incorporating the data to support key metrics.	Data platform template (i.e., empty database); Data upload/download training tools; User interface, with documentation	24 months
Task 5: Pilot test the streamlined Annual Report web interface	Technical memo summarizing Pilot test implementation success and failures, and recommendations for improving the streamlined Annual Report web interface	36 months
Task 6: Use the Focus Group to refine the new Annual Report format	Joint Report from the contractor and Focus Group to the Steering Committee recommending the new Annual Reporting format	42 months

SECTION 4. SPECIAL REQUIREMENTS AND INSTRUCTIONS

Bidders will be required to comply with the following special requirements and instructions during the performance of services rendered under this project:

Insurance

Bidders shall, at their sole expense, maintain in effect at all times during the performance of services awarded under this Proposal Form, general liability insurance providing for bodily injury liability and property damage liability. The combined single limits of liability for bodily injury or property damage shall be One Million Dollars (\$1,000,000) for each occurrence and One Million Dollars (\$1,000,000) aggregate, with the policy naming Southern California Coastal Water Research Project Authority and the Stormwater Monitoring Coalition Member Agencies as Additional Insured. Further, workers compensation insurance shall be held and maintained as required by applicable laws of the State of California with a minimum amount and limit of One Million Dollars (\$1,000,000) for each accident. Bidders shall also hold automobile liability insurance (bodily injury and property damage liability), including coverage for all owned, hired, and non-owned automobiles, with the combined single limit of liability of Two Hundred Fifty Thousand Dollars (\$250,000) for any one accident or loss. Bidders shall provide SCCWRP with evidence that policies providing such coverage and limits are in full force and effect within ten (10) days of the award of any contracts by SCCWRP. Such certificates shall provide that not less than thirty (30) calendar days advance notice will be given to SCCWRP prior to cancellation, termination, or material alteration of said policies of insurance.

SECTION 5. BID EVALUATION PROCESS AND CRITERIA

Following the opening of bids, the SMC will evaluate and score the bids received. Each bid submitted will be evaluated using the following criteria and scoring system, with a maximum possible score of 100.

- 1) Expertise with data management, statistical analysis and visualization (30 points): Each bid will be ranked on a scale of 0 to 30 points based upon the bidders demonstrated expertise with creating data management systems, data analysis and visualization tools, and user-friendly web portals/user interfaces. Additional points are available for experience working with one or more SMC member agencies.
- 2) Qualifications and experience with stormwater programs (30 points): Each bid will be rated on a scale of 0 to 30 points based upon the bidder's demonstrated experience with California stormwater program (MS4) permit requirements, including the preparation and completion of annual reports. Additional points are available for experience working with one or more SMC member agencies or on a project team.
- 3) Qualifications and experience with group facilitation (20 points): Each bid will be rated on a scale of 0 to 20 points based upon the bidder's demonstrated success leading large groups with diverse interests, including actionable outcomes based on consensus group opinions.
- 4) Price (20 points): The lowest bid price will receive the maximum score of 20 points, with higher bids receiving scores proportional to the lowest bid price.

The bidder receiving the highest combined score will be considered for a contract to perform the proposed work.

SECTION 6. PROPOSAL SUBMISSION

The bidder is required to submit Cost Information and a Statement of Qualifications, as well as any required permits or certifications, as detailed below.

Cost Information

Bidders are required to list hourly labor rates inclusive of all fees and overhead according to table 1. Costs should be allocated on an annual per task time and materials basis not to exceed \$300,000.

Table 1. Labor cost information.

Name	Firm	Title	Hourly Labor Rate	Number of Hours/Year	Total Annual Cost per Person
[Key Personnel by Name]					
TOTAL ANNUAL LABOR COST					

Bidders are also required to provide any projected direct costs according to Table 2. These items may include travel, computer, and other costs related specifically to job duties.

Table 2. Other direct charges.

Item	Cost/Item	Quantity	Total Annual Cost per Item
TOTAL ANNUAL COST OTHER DIRECT CHARGES			

Statement of Qualifications

Bidders are required to submit a Statement of Qualifications detailing the following information pertinent to the elements of work being bid. The document should include the following:

1. A description of the firm
2. A description of key personnel (resumes can be added as an appendix)
3. A description of experience in data management and visualization
4. A description of experience with stormwater programs, and
5. A description of experience with group facilitation

This Statement of Qualifications must not exceed eight (8) single-sided pages, 12-point font, exclusive of resumes.

Certifications and Permits: Bidders are required to list all relevant certifications and permits necessary and/or desirable to perform the work being bid.

SECTION 6. CERTIFICATION OF BIDDER

Name of corporation, partnership, or individual in whose behalf the bid is submitted:

Address: _____

City/State/Zip: _____

Phone: _____ FAX: _____ E-mail: _____

Tax Identification No.: _____

The full names and addresses of all persons and parties interested in the foregoing proposal as principals are as follows: (If bidder is a corporation or organization, give names of President, Secretary, and Treasurer; if bidder is a partnership, give the names of all partners.)

Name	Title
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I certify under penalty of perjury under the laws of the State of California that the foregoing representations are true and correct. Further, I certify that I have carefully examined the proposed work and the specifications as contained herein, and hereby propose to perform and complete all the work for this project as specified, in accordance with these specifications, and to furnish all materials and equipment necessary therefore to the satisfaction of SCCWRP, at the price(s) indicated within this document. In the event that this proposal is accepted by SCCWRP and the said work is awarded to the undersigned bidder, the said bidder agrees to sign and date, within seven (7) calendar days after it has been delivered or mailed to the bidder or its authorized agent, the Agreement for the performance of the work.

Signature of Bidder: _____

Title: _____ Date: _____