



NIPOMO COMMUNITY SERVICES DISTRICT

REQUEST FOR PROPOSAL

Public Outreach and Education for Waterline Intertie Project

Proposals Due no later than:
xxxxxxx

Issued by:
NIPOMO COMMUNITY SERVICE DISTRICT
xxxxxxx

I. INTRODUCTION

Nipomo Community Service District (District) is a public agency that provides a safe and reliable supply of high quality water to the Nipomo Community, and is committed to water reliability, water quality, sound financial and resource management, customer service, and environmental stewardship.

II. PROJECT DESCRIPTION

Currently, the District, three other area purveyors, agriculture and a large number of rural residences rely on groundwater as the sole source of water. Groundwater is pumped from the Nipomo Mesa Management Area (NMMA) of the Santa Maria Groundwater Basin, an aquifer that has been the subject of ongoing litigation since 1997. The California State Superior Court of Santa Clara County approved a Settlement Stipulation on August 3, 2005, containing a requirement that the District and the other water purveyors import a minimum of 2,500 acre-feet of supplemental water yearly to the NMMA from the City of Santa Maria in order to reduce groundwater pumping.

The Waterline Intertie Project (Project) is described in the Final Environmental Impact Report that is available on line at www.nipomocsd.com. Section III (pages 1 through 8 are attached as Exhibit A) to provide a Project overview.

The funding approach for the Project includes formation of an Assessment District covering properties within the four water services areas. The District and purveyor partners are drafting a Memorandum of Understanding with the County of San Luis Obispo, who, as the only over reaching public agency, will lead the Assessment Formation.

The District will provide the selected firm with a list of property owners for the various water purveyors.

The outreach strategy should identify property owner types, which shall include:

- a.) single family resident;
- b.) multi-family resident;
- c.) non-residential (industrial, commercial); and
- d.) publicly-owned

District is separately engaging a firm to develop an Assessment Engineers Report documenting the assessment charge. A preliminary Assessment report is expected to be complete in April 2010. A Proposition 218 Assessment election is scheduled for July 2010. District expects that a successful election will result in submitting the assessment to the County of San Luis Obispo in October 2010

for collection in fiscal year 2011/2012. The successful applicant will be expected to work with this firm to understand the assessment charge that will be presented to the public.

III. SERVICES TO BE PROVIDED

District is requesting proposal from firms that can plan and execute an integrated outreach and education strategy aimed at providing a fair and impartial presentation of facts related to the Project and the pending Assessments. The successful proposer will develop an overarching Outreach and Education plan to include, at a minimum, the following:

1. Property owner outreach and education strategies to include: development of messages, develop public relations plan, development of support materials, development of an integrated media strategy, development of an outreach campaign, development of exhibit and display materials, development of a tracking, monitoring and evaluation plan.
2. Market Research (Survey or other): Conduct market research and/or provide other services to gather consumer input necessary to develop and evaluate outreach and education efforts.
3. Coordination with the District: Explain how the proposer will ensure close coordination with the District and the County of San Luis Obispo for the duration of the contract including, at a minimum, the process for identifying and addressing emerging problems and attending meetings at the discretion of District. Further, explain how the proposer will provide advice, counsel, and assistance to District on matters to educate the public on the necessity of the Waterline Intertie Project.
4. Project Plans: Tasks, Schedule, Budget.

IV. SCOPE OF WORK

District is looking for feedback on the level of support/lack of support for the Project and proposed assessment charge. In pursuing this revenue source, the consultant must also research and determine the level of support, the best methodology to communicate with potential voters and perform such outreach.

Applicants should prepare and submit a proposal for market research/survey and outreach services for a Waterline Intertie Project Assessment Charge that describes the applicant's ability to satisfy the requirements to conduct a survey of potential voters/property owners and a successful outreach plan to communicate on a fair and impartial basis the necessity of reliable water supplies and gain public acceptance within the Project service area for a proposed Assessment Charge. The specific tasks of this project include:

1. Conduct market research in the Project service area with direction from District staff to gauge support for an assessment charge.

2. Compile research results in a report and executive summary with cross sections detailing the results and findings; and
3. Present research findings to District staff and Board of Directors at a planned workshop with a PowerPoint presentation.
4. Develop and implement a multifaceted strategic outreach plan for property owners for each specific property owner type as identified, for approval by District. The plan shall include, at a minimum:
 - a. An overall Outreach and Education strategy;
 - b. A media strategy;
 - c. Web site and other Internet based strategies;
 - d. Identification and plan to target project audience;
 - e. Key messages;
 - f. Potential cooperative activities;
 - g. Promotional and public relations activities; and
 - h. A tracking and evaluation plan.
5. Perform the necessary outreach to build support for such a assessment charge, as outlined in the prepared strategic outreach plan;
6. Produce outreach literature and collateral materials consistent with District messaging;
7. Prepare periodical written/oral updates for District staff and Board of Directors that detail the support and opposition and progress identified though outreach related to the assessment charge;

V. GENERAL PROPOSAL INFORMATION

1. Applicants are encouraged to carefully review this RFP in its entirety prior to preparation of their proposal response.
2. All proposal responses will become property of District.
3. Applicants may modify or amend its proposal response only if District receives the amendment prior to the deadline stated herein for receiving proposals and statement of qualifications.
4. A proposal 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 proposal response.

5. Proposal Validity – Proposals must be valid for a period of at least 60 days from the closing date and time of this solicitation. Proposals may not be withdrawn after the submission date.
6. Pre-Contractual Expenses – District shall not, under any circumstance, be liable for any pre-contractual expenses incurred by Applicants in the preparation of their Proposals. Applicants shall not include any such expenses as part of their Proposals. Pre-contractual expenses are defined as expenses incurred by the Applicant in preparing its Proposal in response to this solicitation; submitting that Proposal to District; negotiating with District any matter related to the Proposal; and, any other expenses incurred by the Applicants prior to the date of award and execution of an Agreement.
7. Right to Audit – Following execution of an agreement and for a period of three years following the completion of the services, District will have the right to audit the successful Applicant's (Awardees') invoices and all supporting documentation generated in performance of services under the agreement.
8. Confidentiality – Confidentiality of Proposals is subject to the following:
 - a. District 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.
 - b. Applicant 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 District shall be under no obligation to consider such supplemental information in its evaluation.
 - c. 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, District will destroy any confidential, supplemental information submitted or return such information to Applicant if so requested.
9. District reserves the right to:
 - a. Reject any or all Proposals;
 - b. Select the Proposal most advantageous to District;
 - c. Verify all information submitted in the Proposal;
 - d. Withdraw this solicitation at any time without prior notice and furthermore, makes no representations that any contract will be awarded to any Applicant responding to this solicitation;
 - e. Award its total requirements to one Applicant or to apportion those requirements among two or more Applicants as District may deem to be in its best interests;

- f. Negotiate the final contract with any Applicant(s) as necessary to serve the best interests of District;
- g. Amend this solicitation;
- h. Amend the final contract to incorporate necessary attachments and exhibits or to reflect negotiations between District and the successful Applicant.

VI. ANTICIPATED PROPOSAL SCHEDULE

RFP published	January 29, 2010
Last day for questions	February 16, 2010
Proposals due	March 1, 2010 at 2:00pm
Proposal Review and Interview process	March 1 – 14, 2010
Recommendation made to Board	March 24, 2010
Contract Schedule	April 2010 – Assessment Ballot

VII. APPLICANT QUESTIONS, REQUESTS FOR CLARIFICATION AND EXCEPTIONS

In the event that the Applicant has any questions, requests for clarification, or wishes to take any exceptions regarding any part of this solicitation or its attachments, the Applicant should notify District Project Manager and Additional Contacts by email with their concerns no later than February 16, 2010, as noted above. District’s responses will be delivered in the form of an addendum to this solicitation. To ensure that you receive the addendum, please notify project manager by email of your intent to submit a proposal.

So that all Applicants will continue to have a fair and equal opportunity in this solicitation, an exception(s) will only be considered to correct errors or if all proposals submitted take exactly the same exception(s). District’s consideration of any exception shall not, in any way, be construed as District’s intent to grant said exception. Exceptions will be evaluated on a case-by-case basis and will be granted only to correct errors in the documentation or when it is deemed to be in the best interest of District.

VIII. PROJECT ADMINISTRATION

Questions regarding any aspect of this solicitation should be directed to District’s Project Manager and/or Additional Contacts. The Project Manager for this engagement is:

Project Manager: Michael LeBrun, Interim General Manager
 Phone: (805) 929-1133
 Email: mlebrun@nipomocsd.ca.gov

Additional Contacts to this proposal include Lisa Bognuda, Assistant General Manager (lbognuda@ncsd.ca.gov) and Peter Sevcik, District Engineer (psevcik@ncsd.ca.gov) at (805) 929-1133.

IX. PROPOSAL INSTRUCTIONS

A. Packaging

Proposals shall be enclosed in a sealed package(s). Applicant's name and address shall appear in the upper left-hand corner of the package. All Proposals shall be identified with *Public Outreach and Education for Waterline Intertie Project* legibly written on the outside of the package(s). If multiple packages are submitted, each package must be legibly numbered (i.e., 1 of 3, 2 of 3, etc).

B. Submittal

1. Applicant shall submit five (5) hard copy proposals, and three (3) separate CD ROM containing the Proposal in a PDF or WORD format to the following address:

Nipomo Community Services District

148 South Wilson Street

Nipomo, California 93444

Attn: Michael LeBrun, Interim General Manager

2. Proposals are due no later than 2:00 PM Pacific time, March 1, 2010. Proposals received after the deadline will not be considered.
3. District will not be responsible for submittals that are delinquent, lost, miss-marked, sent to an address other than the address provided above, or sent by mail or courier service and not signed for by District.

C. Response Requirements

1. The information requested below will be used to evaluate the Applicant's Proposal. Applicants may be deemed non-responsive if they do not respond to all Sections, a through j (listed below).
2. Proposals must be prepared simply and economically, providing a straightforward, concise description of methodology and approach to satisfy the requirements of this solicitation. Emphasis should be on completeness and clarity of content with sufficient detail to allow for accurate evaluation and comparative analysis.

3. Applicant's Proposal will not exceed 10 pages in length, exclusive of supporting materials, and be clear, concise, accurate, and comprehensive. Excessive or irrelevant materials will not be favorably received. All proposals must include the following:
- a. Identification of lead consultant and any sub-consultants. Include company name (complete legal name), address, telephone, fax number, project manager office and cell phone numbers, contact name and e-mail address.
 - b. Proposed project staffing and organization. Include experience and qualifications of designated project manager and key staff personnel. Also include organization chart for the project team. Applicant shall submit a complete list of all sub consultants they intend to utilize in the provision of services requested in this solicitation.
 - c. Experience and qualifications of consultant team. Include name, title, organization, address, and telephone number of at least three client references for which similar services were performed over the last two years. The Selected Consultant should describe its firm's experience conducting market research and outreach to support an assessment charge for government agencies, preferably, water agencies. Candidates should provide several samples of similar or related work performed and references of satisfied clients/customers.
 - d. Work plan that includes planning and conducting market research, outreach, planning and execution of an outreach plan and an understanding of the project requirements and objectives with a schedule of activities. A firm's ability to complete public outreach, report the results and then develop a follow-up outreach plan with the flexibility to accommodate District's schedule will be strongly considered in the selection of a consulting firm.
 - e. Cost and Price Proposal. All activities of the outreach plan will be itemized and hours shown for all project staff. Include billing rate for each project staff member as well as travel, other expenses and any multipliers. Any sub-consultant costs, including mark up, should be itemized and represented in the same manner. The response should specify the basis, upon which your fees will be calculated, expenses for which you would expect reimbursement, and whether you would charge for travel time. The sum of anticipated reimbursable expenses shall be submitted.
 - f. Disclosure of potential conflicts of interest with District.
 - g. Applicant shall state herein their willingness and ability to provide the required insurance coverage and Acord insurance form. Insurance requirements are listed in Section XI herein and in the Sample Agreement (Exhibit "A"). District will request the actual Acord insurance form and associated documentation when recommendation for award is made.
 - h. Signed Acceptance Letter

X. CONTRACT AND INSURANCE REQUIREMENTS

A Sample Agreement has been attached (Exhibit "A") for your review. This agreement is representative of the agreement that will be executed upon award to the Selected Consultant. Submission of your proposal in response to this RFP constitutes your acceptance of all terms and conditions set forth in this sample agreement.

The Selected Consultant shall procure and maintain, for the duration of the agreement insurance against claims for injuries to persons or damages to property arising from or in connection with the performance of the work performed. The Selected Consultant shall provide the following coverage:

Commercial General Liability	\$1,000,000
Business Automobile Liability	\$1,000,000
Workers' Compensation	\$1,000,000

Prior to the start of work, the Selected Consultant shall provide evidence of insurance from an insurer(s) certifying to the coverage, including an endorsement naming District as additionally insured. For a complete description of the insurance requirements, please see Section 15 of the Sample Agreement (Exhibit "B").

XI. ACCEPTANCE

An Acceptance Letter has been attached (Exhibit "C") to this RFP. This Acceptance Letter must be completed and signed by the firm or team of firms submitting a proposal in response to this RFP (hereinafter referred to as "Applicant"), and shall be submitted with the Applicant's proposal.

XII. SELECTION PROCESS

Applicants will be evaluated based on the strength of the proposal and the interview (if applicable) using the following criteria:

1. Completeness of the proposal (adherence to Item IX.C. Proposal Requirements);
2. Understanding of the project and District's objectives;
3. Quality of proposer's approach;
4. Approach the consultant would take in market outreach planning, conduct, development and reporting; and the approach the consultant would take in planning and executing an effective outreach plan that supports a successful assessment charge campaign.
5. Proven experience in developing and implementing comprehensive survey, outreach, and education programs, particularly ones associated with public water infrastructure projects funded by assessment districts.

6. Qualifications, background, and prior experience of both the project manager and the Applicants firm(s) in conducting similar services;
7. Responsiveness to requirements of this RFP;
8. Cost and price proposal. Applicants should note that the lowest bid will not be the deciding factor in our final selection;
9. Willingness to enter into the District's Professional Services Agreement without objection;
and
10. Presentation, if applicable.

Based on review of the proposals, a short list of Applicants will be selected to participate in an interview. The interview will afford the Applicants an opportunity to present the key personnel assigned to the engagement and discuss their qualifications. The selection panel may ask questions about the Applicant's written Proposal and other issues regarding their proposed Scope of Services. Interview presentations will be evaluated.

A successful Applicant will be selected for recommendation of contract award. The selection committee will recommend the firm that provides the best overall value to District. Contract award is subject to the approval of District's Board of Directors.

By submitting responses to this solicitation, Applicants understand and agree that District may award a contract to the firm whose approach exceeds or varies from the requirements listed. District will be the sole judge of which proposal best satisfies the needs of District.

Negotiations regarding agreement terms, conditions, scope of services, and pricing may or may not be conducted with the selected Applicants. Therefore, Proposals submitted should contain the Applicant's most favorable terms and conditions, since the selection and award may be made without discussion with any Applicants. If District engages the Applicants in negotiations and satisfactory agreement provisions cannot be reached, then negotiations may be terminated. District may elect to contact another firm submitting a Proposal. This sequence may continue until an agreement is reached.

EXHIBITS:

Exhibit A – Excerpts from Final Project EIR

Exhibit B— Sample Professional Services Agreement

Exhibit C— Acceptance Letter

Exhibit D — Quote Sheet

Exhibit E — Map of Project area and Purveyor service areas.

EXHIBIT "A"

Excerpts from Final Project EIR

EXHIBIT "B"

Sample Professional Services Agreement

EXHIBIT "C"

Quote Sheet

Exhibit "D"

Project Area and Purveyor Service Areas