

THE METROPOLITAN WATER DISTRICT OF SOUTHERN CALIFORNIA



REQUEST FOR QUALIFICATIONS

RFQ-DW-1272

PUBLIC OUTREACH AND COMMUNITY SUPPORT SERVICES

FOR WATER INFRASTRUCTURE PROJECTS

KEY DATES

REQUEST FOR QUALIFICATIONS ISSUED:	March 11, 2021
REQUEST FOR CLARIFICATION DUE BY:	March 25, 2021, BY 11:00 A.M. PST
ELECTRONIC STATEMENT OF QUALIFICATIONS DUE BY:	April 12, 2021, BY 11:00 A.M. PST

METROPOLITAN WILL ONLY ACCEPT ELECTRONIC SUBMITTALS

All Respondents must be registered on Metropolitan's E-procurement (online solicitation) system in order to submit an online submittal in accordance with the RFQ requirements.

To ensure receipt of the latest information and updates regarding this solicitation, interested parties must register online at www.mwdh2o.com; Click on "Doing Business With Us"; then "Registration" and then "New Vendor Registration".

Contract Analyst: DEVINA WHITT
E-mail Address: DWhitt@mwdh2o.com

Table of Contents

SECTION 1: INFORMATION FOR RESPONDENTS.....	1
1.1 About Metropolitan.....	1
1.2 Purpose of this Request for Qualifications (RFQ).....	1
1.2.1 Respondents should be advised that:.....	1
1.3 Minimum Qualifications.....	2
1.4 Business Outreach Program.....	2
1.4.1 Small and/or Disabled Veteran Business Enterprise (S/DVBE) Incentive.....	2
1.4.2 Regional Business Enterprise (RBE) Incentive.....	3
1.5 Request for Clarification.....	3
1.6 General Statement of Qualifications Information.....	4
1.7 Rights Reserved to Metropolitan.....	4
1.8 Validity.....	4
1.9 Pre-Contractual Expenses.....	5
1.10 Confidentiality.....	5
1.11 Protest Procedures.....	5
1.12 Award of Agreement.....	5
1.13 Sample Agreement.....	5
1.14 Task Orders.....	5
1.15 Certificate of Insurance.....	6
1.16 Participating Public Agencies.....	6
1.17 Definitions.....	6
SECTION 2: SCOPE OF SERVICES.....	8
2.1 Objective.....	8
2.2 Professional Services Required.....	8
2.3 Deliverables.....	8
2.4 Metropolitan Obligations.....	8
3.1 Firm Qualifications.....	10
3.2 Record of Past Performance.....	10
3.3 Key Personnel and Staff Qualifications.....	11
3.4 Technical Approach and Methodology.....	11

3.5 Business Outreach Program.....	11
SECTION 4: STATEMENT OF QUALIFICATIONS INSTRUCTIONS.....	12
4.1 General.....	12
4.2 Online Submittal Instructions	12
4.3 Response Requirements	13
SECTION 5: PRE-QUALIFICATION, EVALUATION PROCESS AND NEGOTIATIONS.....	16
5.1 Pre-Qualification and Evaluation Process	16
5.2 Direct Agreement Award or Additional Solicitation Within Pre-Qualified Pool	16

ATTACHMENTS (attached sepaly):

- A. Agreement (Sample)
- B. Task Order (Sample)
- C. Fee Schedule
- D. Respondent’s Contact Information Form
- E. Respondent’s Compliance Form
- F. Respondent’s Potential Conflict of Interest Form

COVID Visitor (Non-Employee) COVID-19 Self-Health Review / Safety Requirements

SECTION 1: INFORMATION FOR RESPONDENTS

1.1 **About Metropolitan**

The Metropolitan Water District of Southern California (Metropolitan) is a public agency incorporated in 1928 pursuant to the Metropolitan Water District Act to build the Colorado River Aqueduct, a facility it still owns and operates. Metropolitan's primary purpose is to provide a supplemental water supply for domestic and municipal uses at wholesale rates to its member agencies. Metropolitan imports water from two sources: the Colorado River via the Colorado River Aqueduct and Northern California via the California Aqueduct. Today, Metropolitan provides nearly 60 percent of the water used within its service area.

Metropolitan consists of 26 member agencies that include 14 cities, 11 municipal water districts, and one-county water authority. Metropolitan is governed by a 38-member Board of Directors made up from the member agencies.

Metropolitan's service area comprises 5,200 square miles and includes portions of the six counties of Los Angeles, Orange, Riverside, San Bernardino, San Diego, and Ventura. Existing Metropolitan facilities include a 242-mile-long Colorado River Aqueduct with 5 pumping plants, a distribution system utilizing 8 functional reservoirs, 5 water treatment plants, 43 pressure control structures, 16 hydroelectric plants, and approximately 830 miles of large diameter pipelines.

Metropolitan estimates that approximately 19.0 million people lived in Metropolitan's service area in 2018, based on official estimates from the California Department of Finance and on population distribution estimates from the Southern California Association of Governments and the San Diego Association of Governments.

Respondents are encouraged to review Metropolitan's Web Site announcements on a regular basis for contracting opportunities: www.mwdh2o.com.

1.2 **Purpose of this Request for Qualifications (RFQ)**

1. The purpose of this RFQ is to develop a list of pre-qualified Respondents willing to provide public outreach and community support services on an on-call basis and to set forth project-specific agreement award procedures for work that falls within the solicited program. (see Section 2.1 for more details)
2. Selection of Respondents as pre-qualified shall be based on the minimum qualifications established in this RFQ.

1.2.1 **Respondents should be advised that:**

1. The pre-qualification list will be maintained for approximately three (3) years ending in the year 2024, unless extended by Metropolitan's Executive Management.
2. Placement on a list of pre-qualified firms does not guarantee award of an agreement and Metropolitan shall solely determine the need for Consultant resources relative to the projected amount of work.
3. Once a respondent is placed on the pre-qualified list, Metropolitan may enter into direct negotiations (e.g., telephonic confirmation of current staffing and specific project costs) and award agreements for specific work based on the demonstrated qualifications in

the SOQ to the Respondent most qualified for a particular assignment based upon project needs.

4. Metropolitan may alternatively initiate an abbreviated RFP to the entire pre-qualified list of consultants and make its selection based on an evaluation of project-specific submittals as time allows.
5. Firms that are awarded an agreement for on-call services are not guaranteed work during the agreement term.

1.3 Minimum Qualifications

Respondent must meet the following minimum qualifications. Respondent's SOQ will be deemed non-responsive to the extent that it does not meet the minimum qualifications.

1. Respondent's key personnel shall have a minimum of five (5) years' experience in providing the type of services specified under this RFQ (see Scope of Services). Respondent shall have at least one established office in Southern California.
2. Respondent shall have provided public outreach services for at least one linear infrastructure (roadway, pipeline, power lines, railway, etc.) construction project within an urban area, within the past five (5) years.

1.4 Business Outreach Program

1. Metropolitan is committed to creating an environment that affords all individuals and businesses open access to the business opportunities available within the regional service area in a manner that reflects the diversity of the service area.
2. It is the policy and practice of Metropolitan to solicit participation by individuals and businesses, including but not limited to small businesses, locally owned businesses, women, minorities, disabled veterans, and economically disadvantaged enterprises, in the performance of all construction, professional services, procurement contracts, supplies, and equipment procured by Metropolitan.
3. For questions or clarification concerning the Business Outreach Program, please call the Business Outreach Office Hot Line at 213.217.7444.

1.4.1 Small and/or Disabled Veteran Business Enterprise (S/DVBE) Incentive

1. The Business Outreach Program (BOP) Office sets Small /Disabled Veteran Business participation levels on RFQ at the minimum organizational goal of **25%**. If this RFQ proceeds to an RFP, agreement award, or Task Order, the BOP Office reserves the right to reduce or increase the participation levels in that RFP, agreement award, or Task Order, following a review of the actual scope of work involved.
2. A Small Business Enterprise (SBE) is independently owned and operated; 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.
3. A Disabled Veteran Business Enterprise (DVBE) is independently owned and operated; is not dominant in its field; and meets the criteria set forth by the Veterans Benefit Act of 2003 (15 U.S.C. 657f) AND BY the California Department of General Services (DGS), Procurement Division (PD), Office of Small Business and DVBE Certification (OSDC).

Disabled Veteran Business Enterprises (DVBEs) should indicate their DVBE status through the Vendor Registration and Certification portal at www.mwdh2o.com.

4. Firms participating as prime Respondents that qualify as either a SBE and/or DVBE will receive a maximum of five (5) percentage points toward total scoring points.
5. To receive S/DVBE incentive, S/DVBE Respondents and sub-consultants/contractors must be certified at the time of response submittal and attached acceptable proof of S/DVBE status, as set forth in Section 4.3 Response Requirements. Acceptable proof of S/DVBE status is:
 - Certification as registered SBE firm issued by NetConnect, hereinafter referred to as E-Procurement System, available through Metropolitan's E-Procurement system, available through vendor registration at www.mwdh2o.com;
 - A small business or micro-business certification issued by the State of California Department of General Services;
 - DVBE certification issued by the State of California or the U.S. Department of Veterans Affairs.

1.4.2 Regional Business Enterprise (RBE) Incentive

1. A RBE is a business that has maintained an office for a minimum of one year within Metropolitan's service area which includes portions of six counties. Those counties are as follows: Los Angeles, San Bernardino, Riverside, Orange, San Diego and Ventura. The business must have a business permit or license issued by the local jurisdiction in which it is located. Please refer to the following link to see cities within our service area: <http://www.mwdh2o.com/DocSvcsPubs/EGIS/MWDBoundary.html>
2. Firms participating as prime Respondents that qualify as a RBE will receive five (5) percentage points toward total scoring points.

1.5 Request for Clarification

1. Firms requesting clarification pertaining to this RFQ must submit all requests by **11:00 a.m., PST, March 25, 2021** on the E-Procurement system website using the Question and Answer (Q&A) tool.
2. Each question must be submitted individually in the Q&A tool. For example, if your firm has two (2) or more questions, enter the first question, submit it and then enter the next question in a separate question detail window, submit it, and so on.
3. As appropriate, Metropolitan will respond to questions for clarification of this procurement or proposal. Answers to questions will be posted on Metropolitan's E-procurement system and/or an addendum will be issued for material information or changes to the RFQ. Requests for documents or information unrelated to clarification of this specific procurement or proposal are not within the scope of this Q&A tool.
4. In order to be responsive, receive updates, clarifications, addenda and addendums, firms must complete the online registration by going to www.mwdh2o.com, click on "Doing Business With Us" then "Registration" and then "New Vendor Registration".

1.6 General Statement of Qualifications Information

1. Respondents are encouraged to carefully review this RFQ in its entirety prior to preparation of the SOQs.
2. All SOQs submitted will become the property of Metropolitan.
3. Respondent may modify or amend its SOQ only if Metropolitan receives the amendment prior to the deadline stated herein for receiving SOQ.
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 SOQ.
5. A SOQ 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 SOQ.

1.7 Rights Reserved to Metropolitan

In addition to rights established elsewhere in this RFQ, Metropolitan reserves the right to:

1. Reject any or all SOQs;
2. Confirm at any time during the solicitation process that the Respondent is able and responsible to perform the requested services in the manner desired, taking into consideration information in the SOQ, any interview conducted, or additional information acquired by Metropolitan;
3. Select for pre-qualification and award an agreement to the firm whose SOQ is most advantageous to Metropolitan;
4. Verify all information submitted in the SOQs;
5. Withdraw this solicitation at any time without prior notice;
6. Decide not to award any agreement to any Respondent responding to this RFQ;
7. Award its total requirements to one pre-qualified Respondent or to apportion those requirements among two or more pre-qualified Respondents as Metropolitan may deem to be in its best interests;
8. Negotiate the final agreement(s) with any pre-qualified Respondent(s) as necessary to serve the best interests of Metropolitan;
9. Amend the RFQ prior to the submission of responses;
10. Amend the final agreement(s) to incorporate necessary attachments and exhibits or to reflect negotiations between Metropolitan and the successful Respondent; and
11. Permit the substitution of ineligible sub-consultants/subcontractors listed in the Statement of Qualifications.

1.8 Validity

SOQ must be valid for a period of at least thirty-six (36) months from the closing date and time of this RFQ. SOQ may not be withdrawn after the submission date.

1.9 **Pre-Contractual Expenses**

Metropolitan shall not be liable for any pre-contractual expenses incurred by Respondents in the preparation of their SOQ. Respondents shall not include any such expenses as part of their SOQ. Pre-contractual expenses are defined as expenses incurred by the Respondent in preparing its SOQ in response to this RFQ; submitting that SOQ to Metropolitan; negotiating with Metropolitan any matter related to the SOQ; and, any other expenses incurred by the Respondent prior to the date of award and execution of an Agreement.

1.10 **Confidentiality**

1. Metropolitan 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. Consequently, unless specifically required by the solicitation, Respondents should not submit personal data such as driver's license information, social security numbers, etc. to avoid the possibility of inadvertent disclosure of this personal information. Please note that Metropolitan cannot consider SOQs marked confidential in their entirety.
2. Respondent may provide supplemental information exempt from public disclosure under Gov. Code § 6254, including "trade secrets" under Evidence Code § 1060. Such supplemental information **shall not be material** to the required submittal information and Metropolitan shall be under no obligation to consider such supplemental information in its evaluation.
3. **If submitting confidential, supplemental information, such information should be sectioned separately from the rest of the submittal and clearly marked "Confidential." Upon completion of its evaluation, Metropolitan will destroy any confidential, supplemental information submitted, or return such information to Respondent if so requested.**

1.11 **Protest Procedures**

Respondents may review Metropolitan's protest procedures at <http://www.mwdh2o.com>, then click on "Doing Business With Us" then "Guidelines" and then "Protest Procedures".

1.12 **Award of Agreement**

After a Respondent is selected, the award of an agreement is contingent upon the successful negotiation of terms, acceptability of fees, and formal approval by Metropolitan.

1.13 **Sample Agreement**

Attachment A is Metropolitan's Sample Agreement. You are requested to carefully review and comment as necessary on any of the provisions set forth in the Sample Agreement. (See Attachment D Respondent's Compliance Form for instructions). Metropolitan reserves the right to modify, add or delete any of the provisions of the Agreement prior to issuance.

1.14 **Task Orders**

Attachment B is a sample Task Order. Respondents should note that the services that may be awarded as a result of this solicitation may be negotiated and ordered through the issuance of a written Task Order. Task Orders will be used to further define elements of work and upon request

by Metropolitan, consultant will complete and submit to Metropolitan a response to the Task Order for the specific project or activity, including cost. Any special requirements and costs may be negotiated during the Task Order process. Task Orders will outline the scope of work and may include work methodology, budget, schedule, personnel and any special requirements, such as sub-consultants. All Task Orders must be approved and signed by both the Consultant and the Agreement Administrator prior to proceeding with any services.

1.15 Certificate of Insurance

Respondent shall state its willingness and ability to provide Metropolitan with required insurance coverage as set forth in the sample Agreement within seven days of notification of selection for award. The insurance coverage required for this RPQ is as follows, and full details are shown in the Attachments-Agreement (Sample):

	Coverage	Amount
1.	General Liability Aggregate	\$1,000,000 \$2,000,000
2.	Automobile Liability	\$1,000,000
3.	Professional Liability or Errors and Omissions Aggregate	\$1,000,000 \$2,000,000
4.	Workers' Compensation: Shall be furnished in accordance with statutory requirements of the State of California and shall include Employer's Liability coverage of \$1,000,000 per accident for bodily injury or disease.	
Endorsements		
•	Additional Insured - Metropolitan, its officers, officials, employees and agents are to be covered as insureds as respect to liability arising out of work or operations performed by or on behalf of the Consultant; or automobiles owned, leased, hired or borrowed by	
•	Waiver of subrogation endorsement on the workers' compensation policy.	
•	For any claims related to this project, the Consultant's insurance coverage shall be primary insurance as respect to Metropolitan, its officers, officials, employees and volunteers. Any insurance or self-insurance maintained by Metropolitan, its officers, officials, employees or agents shall be excess of the Consultant's insurance and shall not contribute with it.	

1.16 Participating Public Agencies

It is intended that any other public agency as defined by Cal. Gov. Code § 6500 shall, if authorized by its governing body, have the option to participate in any award made as a result of this solicitation. This option shall extend for the duration of the term of the agreement with Metropolitan and shall be subject to consultant's acceptance. The participating public agency shall accept sole responsibility for placing orders, arranging for delivery of services, and making payments to the consultant. Metropolitan will not be liable or responsible for any obligations, including but not limited to financial responsibility, in connection with any participation by another public agency.

1.17 Definitions

1. Agreement: Contractual document specifying the terms and conditions and defining the Scope of Services to be performed by the Respondent for a specific project, or on a continuing or on-call basis.

2. Agreement Administrator/Project Manager: The person assigned to administer the work to be accomplished by Consultant and the primary point of contact between Metropolitan and Consultant.
3. Cost Proposal or Fee Schedule: A summary of costs by major task or project phase showing subtotals and totals to be charged.
4. Consultant/Contractor: The party entering into an Agreement with Metropolitan for the performance of the work described in this RFQ.
5. Disabled Veteran Business Enterprise: Any firm that is independently owned and operated; is not dominant in its field; and meets the criteria set forth by the Veterans Benefit Act of 2003 (15 U.S.C. 657f) AND BY the California Department of General Services (DGS), Procurement Division (PD), Office of Small Business and DVBE Certification (OSDC).
6. E-Procurement System: Refers to either Metropolitan's NetConnect vendor website and/or PlanetBids website.
7. 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 a SOQ is being submitted.
8. Key Personnel: Lead members of Consultant's team and actual direct participants in the services. Key personnel may include the Consultant's employees or a Sub-consultant.
9. Metropolitan: Metropolitan as used hereinafter shall refer to The Metropolitan Water District of Southern California.
10. Regional Business Enterprise: Firms having an office located within one of the following counties: Los Angeles, Orange, Riverside, San Bernardino, Ventura and San Diego for at least one year.
11. Respondent: A sole proprietor, partnership, corporation, or joint venture making an SOQ or response to Metropolitan's RFQ.
12. Small Business Enterprise: Those firms meeting the criteria set forth by the Small Business Administration in Title 13, Code of Federal Regulations, Part 121.
13. Solicitation: A Request for Proposal (RFP), Request for Information (RFI) or Request for Qualifications (RFQ) issued by Metropolitan.
14. Sub-consultant/Sub-contractor: Any person, firm, or corporation performing work or providing service for the Consultant in support of the Scope of Services for an agreement.

SECTION 2: SCOPE OF SERVICES

2.1 **Objective**

Metropolitan seeks to prequalify on-call consultants to plan and execute various public outreach and community relations activities for upcoming water infrastructure projects within Metropolitan's service area. The primary focus will be on pipeline projects within Orange and Los Angeles Counties; however, assistance may be needed on projects throughout Metropolitan's service area. The outreach will create awareness and help gain community support for the projects, manage expectations, and foster trusted relationships.

2.2 **Professional Services Required**

- developing outreach plans, schedules and budgets
- identifying stakeholders, outreach areas, demographics, language needs
- identifying local community concerns related to construction
- coordinating with local schools and other entities regarding traffic impacts
- developing messages, copywriting
- developing collateral materials and graphic design (Web, social media and print)
- coordinating community meetings, logistics and staffing the sign-in table
- providing translation assistance for public meetings and in-language materials
- procuring mailing lists, producing mailers, and other mail house support
- documenting and tracking community interest
- providing guidance and recommendations to address project issues
- preparing project outreach summaries and documentation upon project completion
- additional communication, public relations, and community outreach as needed

2.3 **Deliverables**

- Outreach plan, schedule and budget
- Delineation of outreach area
- Assessment of demographics, language needs
- Key messages
- Collateral materials and graphic design (Web, social media and print)
- Coordination and logistics for community meetings
- Translation assistance for public meetings and in-language materials
- Mailers, mailing lists, postage, other mail house support
- Community interest database
- Project outreach summary and documentation upon project completion

2.4 **Metropolitan Obligations**

- Project management
- Presentations at public meetings; in-person meetings with city staff, elected officials, member agencies, key stakeholders

- Direct outreach to residents and businesses adjacent to construction areas
- Response to calls and emails regarding construction impacts, concerns
- Coordination with MWD project team
- Site maps identifying construction locations
- Construction schedule and details on construction activities, traffic control plan
- Project photos, video production
- Web page, social media postings

SECTION 3: EVALUATION CRITERIA

The following represents the evaluation criteria and weighted percentage (%) points that will be considered during the evaluation process. Each SOQ will be competitively evaluated on its relative strengths and weaknesses against the following criteria listed below and as described in Section 4. Respondent shall provide information for the statements listed below as part of the submittal.

Evaluation Criteria	Weights
Firm Qualifications	20%
Record of Past Performance	20%
Key Personnel and Staff Qualifications	25%
Technical Approach and Methodology	25%
Business Outreach Program (SBE/DVBE)	5%
Business Outreach Program (RBE)	5%
Total	100%

3.1 **Firm Qualifications**

1. Based on your firm’s expertise and qualifications, please explain why your firm and/or team is best suited to provide the services requested under this solicitation. Please be specific about the services listed in Section 2.3 that you will provide and identify the project area these services will cover.
2. Provide firm’s overall experience, technical competence and qualifications to provide the required services. Highlight firm’s qualifications relative to the minimum qualifications of the RFQ.
3. Provide number of years firm has been in existence and its ability to provide services through the duration of project period.
4. Provide the number of years your firm’s key personnel has provided the type of services specified in this RFQ.

3.2 **Record of Past Performance**

1. Cite the total number of projects (table format preferred) worked on within the last five (5) years most relevant in size and scope to the services requested under this solicitation. For each, provide the project title, a brief narrative/description, and indicate your/the firm’s role (lead firm, support, etc.), and the final project outcome and the benefits realized by the client as a result of the work. Please provide Directory/Contact Information. List the most current projects first. Please provide all pertinent information including but not limited to:
 - Client name and address.
 - Client contact name, telephone and fax number, and email address.
 - Project schedule and cost.
 - Names of key personnel of the Respondent’s team that participated on the named projects and their specific responsibilities.

2. Please choose three (3) projects from those cited above that best demonstrate your qualifications and provide a **detailed** description of each. Provide a project schedule and list percentage of completion for current or in progress related efforts. Identify your responsibilities, problems/issues encountered, solutions recommended, results generated, and the final product, outcome and the benefits realized by the client as a result of the work.

3.3 Key Personnel and Staff Qualifications

1. Provide an organization chart and staffing plan identifying key personnel, related lines of authority and responsibility of those team members who will provide the services described in this RFQ. Identify any sub-consultants and identify their role.
2. Provide appropriate resumes only for key staff members that will be assigned to this project. Resumes shall highlight title, education, licenses and certifications (issue and expiration dates) with similar project experience and qualifications for the services described in this RFQ.

3.4 Technical Approach and Methodology

1. Based on your firm's similar past experience provide a description of the anticipated procedures and general approach that will be used to perform the requested services. Discuss objectives, recommendations and solutions. Respondent is encouraged to identify and recommend any improvements/enhancements for the proposed service, as well as highlight other issues Respondent deems prudent.
2. Overall quality, depth, and presentation of SOQ as it addresses Metropolitan's needs and requirements.

3.5 Business Outreach Program

SBE/DVBE

Respondents (primes) who qualify as a Small Business Enterprise or Disabled Veteran Business at the time of the Proposal submittal will be awarded five (5) percentage points toward the total number of evaluation points. The SBE/DVBE status of Respondents will be verified using Metropolitan's E-Procurement System vendor information profile.

RBE

Respondents (primes) who qualify as Regional Business Enterprise (RBE) at the time of the Proposal submittal will be awarded five (5) percentage points toward the total number of evaluation points. The RBE status of Respondents will be verified using Metropolitan's E-Procurement System vendor information profile.

SECTION 4: STATEMENT OF QUALIFICATIONS INSTRUCTIONS

4.1 **General**

SOQ **shall be submitted online** in accordance with the “Online Submittal Instructions” below. Failure to submit your SOQ online as set forth in this Section by the deadline will result in a non-responsive determination.

4.2 **Online Submittal Instructions**

1. SOQ shall be submitted online at <http://www.planetbids.com/portal/portal.cfm?CompanyID=16151> through Metropolitan’s E-Procurement system
2. First time users to the system must first register before attempting to upload their SOQ. SOQ shall be submitted in an Adobe Acrobat PDF format or Microsoft Word format.
 - a. Respondent shall upload its technical file as the “response” file type
 - b. Respondents shall upload its fee schedule separately as the “cost” file type.
 - c. Please note the two file types and follow the upload options on the E-Procurement system.
3. In order to upload a response, in addition to a login identification and password, Users **MUST HAVE a PIN** code prior to attempting to post a document. Respondents should ensure that they have their correct pin code prior to the SOQ due date.
4. To retrieve your User PIN code, please navigate to your vendor profile page on the E-Procurement system and click on “Get PIN.” **PLEASE AVOID WAITING UNTIL THE DAY AND TIME THE SOLICITATION CLOSING TIME TO SEEK PIN CODE ASSISTANCE FROM E-PROCUREMENT REPRESENTATIVES.**
5. Respondent shall submit a Response File, Cost File and (if applicable), a General Attachment File. Files shall be named as follows:
 - a. Response file: FirmName_RFQNo.pdf [or] doc, as an example –
 - **“ACMECompany_1272.doc”**
 - b. Cost file (Fee schedule): FirmName_RFQ No_cost.pdf [or]doc, as an example –
 - **“ACMECompany_1272cost.doc”**
6. Respondent’s aggregate response file size should not exceed 15MB. Firms not adhering to this protocol may be deemed non-responsive.
7. SOQ received after the stated time and date, will be considered late and will be automatically rejected by the E-Procurement system. **PLEASE ALLOW A MINIMUM OF ONE HOUR** before the solicitation closing time to upload your SOQ.
8. **Respondent is solely responsible for familiarizing itself with all the necessary steps to ensure that its SOQ is submitted correctly both in form and content and within the stipulated deadline.** Firms that are locked out by the E-Procurement system during the posting process will be deemed non-responsive and not considered during the evaluation process.

9. Metropolitan will not be responsible for SOQ that are delinquent, lost, **miss**-marked, or that do not follow the SOQ procedures given herein, or sent by mail, e-mail or courier service (paper hard copies/CDs or other storage media will not be accepted in lieu of an electronic submittal on Metropolitan's E-Procurement System, PlanetBids).
10. Respondents should contact a Metropolitan E-procurement representative at 1.888.614.2437 with problems that may be encountered during the online posting process.

4.3 Response Requirements

1. The information requested below will be used to evaluate the Respondent's SOQ based on the criteria outlined in Section 3. Respondents may be deemed non-responsive if they do not respond to all Sections listed in Item 4 below.
2. Readers of Respondent's SOQ need to quickly navigate to points of reference for locating important information. Therefore, it is preferable that your SOQ include a table of contents using links to the titled Sections listed in number 4 below.
3. SOQ must be prepared simply and economically, providing a straightforward, concise description and information to satisfy the requirements of this RFQ. Emphasis should be on completeness and clarity of content with sufficient detail to allow for accurate evaluation and comparative analysis. **A material departure from the format requirements listed herein may render the SOQ as non-responsive.**
4. SOQ shall be organized in separate sections tabbed with corresponding letters and related headings in the order presented below:
 - A. Executive Summary Letter
 - B. Table of Contents
 - C. Minimum Qualification(s)
 - D. Firm Qualifications
 - E. Record of Past Performance
 - F. Key Personnel and Staff Qualifications
 - G. Technical Approach and Methodology
 - H. Business Outreach Program
 - I. Fee Schedule
 - J. Respondent's Contact Information Form
 - K. Respondent's Compliance Form
 - L. Potential Conflict of Interest Form

A. Executive Summary Letter

This letter shall be a brief formal signed letter from Respondent that provides information regarding the firm and its ability to perform the requirements of this RFQ.

The letter should be signed by an individual authorized to bind the submitting entity or by two (2) corporate officers authorized to bind the proposing entity as set forth in the California Corporations Code. An unsigned SOQ may be grounds for rejection

B. Table of Contents (TOC)

Respondent shall identify all materials and enclosures being forwarded in response to this RFQ in the order stated in section 4 above. Readers need familiar points of reference to quickly locate important information. The TOC's page numbers assist when users thumb through a hard copy, and when viewing a "soft" copy of the SOQ, users need to navigate to a point of reference by clicking on the TOC heading. It is preferable that a TOC be included in your SOQ with heading links.

C. Minimum Qualifications

Respondent shall herein demonstrate that it meets the minimum qualifications by identifying and providing a narrative on how it meets each of the minimum qualifications listed below. Respondent's SOQ will be deemed non-responsive if these minimum qualifications are not met.

- Respondent's key personnel shall have a minimum of five (5) years' experience in providing the type of services specified under this RFQ (see Scope of Services).
- Respondent shall have an established office in Southern California.
- Respondent shall have provided public outreach services for at least one infrastructure project within an urban area, within the past 5 (five) years.

D. Firm Qualifications

As required by section Three – Evaluation Criteria, Respondent shall submit its Firm Qualifications herein.

Respondent shall limit this section to 5 pages

E. Record of Past Performance

As required by section Three – Evaluation Criteria, Respondent shall submit its Record of Past Performance herein.

Respondent shall limit this section to 6 pages total, excluding project listing. Three projects selected to detail shall be limited to 2 pages each.

F. Key Personnel and Staff Qualifications

As required by section Three – Evaluation Criteria, Respondent shall submit its Key Personnel and Staff Qualifications herein.

Respondent shall limit this section to 5 pages (not including resumes which shall be limited to 2 pages per individual).

G. Technical Approach and Methodology

As required by section Three – Evaluation Criteria, Respondent shall submit its Technical Approach and Methodology herein.

Respondent shall limit this section to 6 pages

H. Business Outreach Program

Respondents that qualify as either an SBE and/or DVBE and wish to receive S/DVBE incentive points must include its acceptable proof of certification status herein as **Appendix 1**.

I. Fee Schedule

Respondent shall use **Attachment C** to complete and submit its hourly fee schedule. The Fee schedule should indicate hourly rates for project staff and any reimbursable costs. Information supplied by Respondent in **Attachment C** shall be utilized for preliminary budgeting purposes and will not be evaluated.

Contract terms and conditions may be negotiated during the agreement process. Respondents are encouraged to provide their best pricing.

Please upload fee schedule separately from the rest of the SOQ on the E-Procurement site as directed in Section 4: 4.2., Item 5.b above.

J. Respondent's Contact Information Form

Respondent shall complete and submit herein, **Attachment D**. (You may include additional lines if needed.)

K. Respondent's Compliance Form

Respondent shall complete and submit herein, **Attachment E** and if applicable, attach additional information.

- Validity of Proposal
- Statement of Compliance
- Certificate of Insurance
- Financial Information

L. Conflict of Interest Form

Respondent and its sub-consultants must complete and submit herein the Conflict of Interest Statement attached herein as **Attachment F**.

SECTION 5: **PRE-QUALIFICATION, EVALUATION PROCESS AND NEGOTIATIONS**

5.1 Pre-Qualification and Evaluation Process

1. SOQs will be reviewed by the Contract Analyst to verify compliance with submission instructions, response requirements, and minimum qualification(s). Any SOQ not meeting the minimum qualification(s) will be deemed non-responsive.
2. SOQ evaluation will commence immediately following the review conducted by the Contract Analyst. During the evaluation process, the evaluation panel may request clarification, as necessary, from Respondents. Respondents should not misconstrue a request for clarification for negotiations. It is anticipated that the evaluation process will be completed within approximately 30 to 45 working days. Respondents will be notified via email regarding status of Respondent's SOQ.

5.2 Direct Agreement Award or Additional Solicitation Within Pre-Qualified Pool

1. Once a respondent is placed on the pre-qualified list, Metropolitan may contact it as specific project services are required by Metropolitan.
2. The manner of agreement award to those on the pre-qualified list shall depend upon the operational time sensitivity of the needed service. Metropolitan may directly award agreements for specific work to the most qualified respondent, based on the demonstrated qualifications of project or discipline-specific technical experts when there are exigent or time sensitive needs for performance of the work. Alternatively, if operational conditions and project needs allow Metropolitan may initiate an abbreviated RFP for project-specific services from the entire pre-qualified list of consultants and award an agreement based on the evaluation of the abbreviated RFP.
3. Negotiations regarding agreement terms, conditions, scope of work, and pricing may or may not be conducted with Respondent. Therefore, the SOQ submitted should contain the Respondent's most favorable terms and conditions. If Metropolitan engages the Respondent in negotiations and satisfactory agreement provisions cannot be reached, then negotiations may be terminated. Metropolitan may then elect to contact another firm submitting a SOQ. This sequence may continue until an agreement is reached.