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6. ADDITIONS/DELETIONS/AMENDMENTS TO THE AGENDA (Government Code §54954.2)
7. PUBLIC COMMENT RELATING TO ITEMS NOT ON THE AGENDA (Limit 3 Minutes)
- *8. APPROVAL OF MINUTES
 - A. July 7, 2021
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24. ADJOURNMENT

ATTEST TO POSTING:



Pam Moss
Secretary of the Board

7-30-21 @ 10:00 a.m.

Date and Time of Posting
Outside Display Cases

**MINUTES OF THE ENGINEERING AND OPERATIONS COMMITTEE MEETING
OF THE RAINBOW MUNICIPAL WATER DISTRICT
JULY 7, 2021**

1. **CALL TO ORDER** – The Engineering and Operations Committee Meeting of the Rainbow Municipal Water District on July 7, 2021, was called to order by Chairperson Nelson at 3:30 p.m. in the Board Room of the District, 3707 Old Highway 395, Fallbrook, CA 92028. *(All meetings are being held with in person attendance following County and State COVID guidelines as well as virtually.)* Chairperson Nelson, presiding.

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL:**

Present: Member Brazier *(via teleconference)*, Member Marnett, Member Nelson, Alternate Largent *(via video conference)*.

Absent: Member Gasca.

Also Present: General Manager Kennedy, Executive Assistant Washburn, Operations Manager Gutierrez, Information Systems Specialist Espino.

Also Present Via Teleconference or Video Conference:

Engineering and CIP Program Manager Williams, Information Technology Manager Khattab, Engineering Technician Rubio.

One member of the public was present via teleconference or video teleconference.

4. **INSTRUCTIONS TO ALLOW PUBLIC COMMENT ON AGENDA ITEMS FROM THOSE ATTENDING THIS MEETING VIA TELECONFERENCE OR VIDEO CONFERENCE**

Mr. Nelson read aloud the instructions for those attending the meeting via teleconference or video conference.

5. **SEATING OF ALTERNATES**

Ms. Largent was seated as an alternate.

6. **ADDITIONS/DELETIONS/AMENDMENTS TO THE AGENDA (Government Code §54954.2)**

There were no revisions to the agenda.

7. **PUBLIC COMMENT RELATING TO ITEMS NOT ON THE AGENDA (Limit 3 Minutes)**

There were no comments.

*8. **APPROVAL OF MINUTES**

A. June 2, 2021

Motion:

To approve the minutes.

Action: Approve, Moved by Member Brazier, Seconded by Member Marnett.

Vote: Motion carried by unanimous roll call vote (summary: Ayes = 4).

Ayes: Member Brazier, Member Marnett, Member Nelson, Alternate Largent.

9. GENERAL MANAGER COMMENTS

Mr. Kennedy announced a Town Hall meeting will be held this evening at 6:00 p.m. to which all ratepayers of RMWD and FPUD have been invited to hear from several speakers as well as receive answers to any of their questions.

Ms. Brazier inquired as to whether the Town Hall meeting was accessible remotely. Mr. Kennedy stated it was available to attend virtually and how all the information has been posted on the website.

10. ENGINEERING AND CIP PROGRAM MANAGER COMMENTS

Mr. Williams updated the committee on the Thoroughbred Lift Station Project including providing the basis for sole sourcing some of the work.

11. OPERATIONS MANAGER COMMENTS

Mr. Gutierrez provided a brief update on the Heli-Hydrant project noting delivery is scheduled for July 20th at the site and will take approximately from that date before it is operational. Ms. Brazier mentioned everyone in the area she has spoken with are highly in favor of the hydrant.

12. COMMITTEE MEMBER COMMENTS

Mr. Nelson inquired about the bio retention basin structure located in front of the new development located on Old Highway 395 and who is responsible for its maintenance. Mr. Kennedy stated it would be the homeowners' responsibility.

13. BOARD ACTION UPDATES

Mr. Williams reported the Board approved the as-needed change order as well as the CIP budget at the June Board meeting.

14. DISTRICT HEADQUARTERS STUDY UPDATE (ENGINEERING)

Mr. Kennedy reported another round of studies were conducted in June to determine if there was a means of maximizing the developable area. Discussion ensued regarding the type of roadway to the property. He noted it was anticipated to have a proposed set of plans to present in August.

Mr. Nelson asked how much additional land RMWD would have as a benefit. Mr. Kennedy stated although it would depend, approximately 12-20 homes.

Discussion continued regarding the roadways.

Mr. Kennedy stated as soon as information became available to share, the ad hoc committee would schedule a meeting to take place at the District headquarters.

Mr. Marnett asked if the baseline would be removing RMWD from its current lot and fully developing. Mr. Kennedy confirmed this was correct.

15. NORTH RIVER ROAD PROJECT UPDATE (ENGINEERING)

Mr. Williams reported Phase II has been completed and Notice of Completion has been prepared to present to the Board in July. He mentioned RMWD received a credit totaling \$70,800 for Phase II as well as an additional one-year project warranty.

Mr. Williams provided an update on Phase III of the project noting staff decided to issue a Change Order which is a deduct to Sancon with staff procuring the manhole covers, frames and lids which have extremely long lead times. He pointed out in addition to the long wait times, the Change Order also includes an extension of time with no increased overhead requested by the contractor with a contractual end date set for October 31, 2021.

Mr. Nelson inquired as to whether staff has worked out all the internal logistics for procuring the necessary manhole covers. Mr. Gutierrez confirmed the orders have already been placed. Discussion ensued.

16. DRAFT REQUEST FOR PROPOSAL (RFP) PROCESS REVIEW (ENGINEERING)

Mr. Williams stated after the meeting held with the committee and staff members, staff has been working to revamp the RFP boiler plate which was currently in the draft stages which will be presented to the committee for review, comment, and discussion prior to the August committee meeting.

Mr. Nelson inquired as to whether it was typical for the committee to review a RFP prior to it being solicited. Mr. Kennedy stated although this was not typical, the committee would have an opportunity to review various RFP templates which will be used as standard models for future RFPs. Mr. Nelson expressed his concern would be mostly in having an opportunity to review RFPs for construction management, environmental engineering, or specific designs for larger projects before they are solicited. Mr. Kennedy explained the process would be to frontload all the mechanics to assist staff with identifying the correct type of contract to utilize.

Ms. Brazier stated she understood Mr. Nelson's concerns.

17. MORRO RESERVOIR MIXING UPDATE (OPERATIONS)

Mr. Gutierrez shared a video of the mixers in action. He mentioned ammonia systems have been purchased to be injected on the inflow, mix it up, and then outflow with chlorinated water. He pointed out for the past three weeks, RMWD has been flowing MWD water into Morro which has never been available in the months of June and July. Discussion followed.

Mr. Gutierrez stated a mixer was in place at Magee tank and another was being considered for the Gomez tank. He explained the water quality at the other two reservoirs was very good; therefore, mixers would not be needed at these sites. Mr. Kennedy mentioned there was room to add three more mixers at Morro if deemed necessary.

18. WATER SERVICE UPGRADE PROJECT (WSUP) UPDATE (OPERATIONS)

Mr. Gutierrez reported the project was 61% complete noting RMWD was approximately 200 meters ahead of Concord. He noted the website will be updated to provided end users with more timely information that may answer most questions. Discussion ensued.

Mr. Nelson inquired to whether RMWD tracks the estimate at completion in terms of money. Mr. Gutierrez stated he was currently in the process of verifying this amount with Ms. Largent. Mr. Kennedy suggested a report be provided to the committee in August.

Mr. Marnett asked whether RMWD would have a few additional meters available once the project is completed. Mr. Gutierrez explained there would be a few spare meters available. Mr. Marnett inquired as to whether data was showing a reduction in water loss since this project began. Mr. Kennedy stated the database has been built and once the July reads are complete, a report of the findings may be available to present at the August committee meeting.

19. RAINBOW HEIGHTS WATERLINE PROJECT UPDATE (OPERATIONS)

Mr. Gutierrez explained the steps taken in preparing comparisons for using in-house staff as opposed to hiring contractors for projects. He reported the initial findings are that no matter how everything was broken down, there appears to be a 5-1 difference in what contractors are charging RMWD. He noted a report of these findings has been drafted and will be presented to Mr. Kennedy for review prior to it being shared with the committees for input.

Discussion ensued.

***20. AS-NEEDED SERVICES EXPENDITURES SUMMARY**

Mr. Nelson reviewed the information contained in the summary. Discussion ensued regarding the Hutton and Turner project as well as the buffer for the environmental work associated with the headquarters development study.

Mr. Williams pointed out the additional column showing the current fund balances.

Mr. Nelson inquired as to the Wilt Road Water Pipeline Design. Mr. Kennedy described the project its purpose was to bring more capacity to the Pala Mesa tank from MWD connections. Mr. Gutierrez said he believed the pipe size would be 18". Mr. Williams offered to put together a report of project costs associated with this project to share with the committee.

21. LIST OF SUGGESTED AGENDA ITEMS FOR THE NEXT SCHEDULED ENGINEERING AND OPERATIONS COMMITTEE MEETING

It was noted updates on the WSUP (including EAC and savings calculations), Rainbow Heights Waterline Project, Morro Reservoir mixers, headquarters development study, and Heli-Hydrant as well as a RFP review should be on the next committee agenda.

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22. ADJOURNMENT


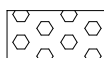


The meeting was adjourned by Member Nelson.

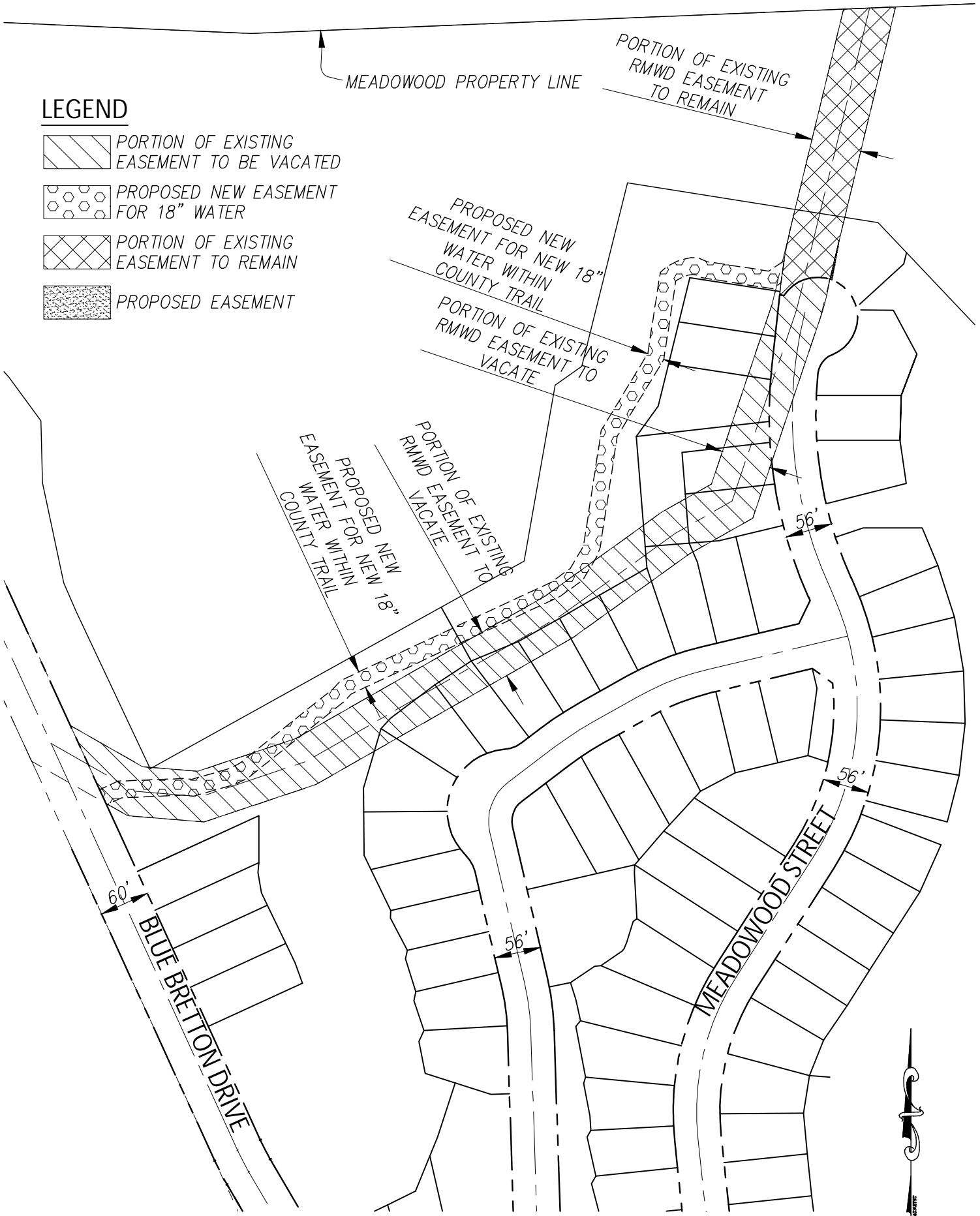
The meeting adjourned at 4:43 p.m.

Flint Nelson, Committee Chairperson

Dawn M. Washburn, Board Secretary

LEGEND

-  PORTION OF EXISTING EASEMENT TO BE VACATED
-  PROPOSED NEW EASEMENT FOR 18" WATER
-  PORTION OF EXISTING EASEMENT TO REMAIN
-  PROPOSED EASEMENT



1"=150'

EXHIBIT F: PROPOSED RMWD EASEMENT REVISIONS



CONTRACT CHANGE ORDER 03

Date: July 22, 2021

Project No. 300008
Contract No. 20-19

Mastercraft Homes Group, LLC
3165 Red Hill Avenue
Costa Mesa, CA 92626

Project Title: HQ Development Study Services

This Change Order provides for: Additional services to prepare colored site plans and colored architecture, draft two new site plans per revised building limits and on-going project management as described below:

Task 12: The Consultant shall prepare a presentation package for the County, Stakeholders, and Community. The work shall include colored site plans and colored architecture. **Cost - \$16,827.00**

Task 13: The Consultant shall draft two new site plans using the revised building plans provided by Helix Environmental Planning, Inc. **Cost - \$3,960.00**

Task 7: The Consultant shall provide on-going project management for all the services described in the Scope of Work, as prescribed in the Professional Services Agreement dated August 5, 2020 and the subsequent executed change orders. **Cost - \$8,000.00**

Total Cost: \$28,787.00

Schedule: Contract expiration date is extended to September 30, 2021.

CONTRACT SUMMARY			
Original Contract Amount	Previous Change Orders	This Change Order	Total Contract Amount
\$122,324	CO# 01: \$0		\$122,324.00
	CO# 02: \$25,000.00		\$147,324.00
		CO# 03: \$28,787.00	\$176,111.00

Recommended by: _____ Date: _____
 Chad Williams, Engineering & CIP Program Manager

Approved by: _____ Date: _____
 Consultant

Approved by: _____ Date: _____
 Tom Kennedy, General Manager

Notice to Proceed: Signature acknowledgment above authorizes Mastercraft Homes Group, LLC to continue work as prescribed in this Change Order.

Change Order

Project:
HQ DEVELOPMENT STUDY SERVICES
Project No. 300008, Contract No. 20-19

Change Order No.: 3

Change Order Date: July 27, 2021

Consultant:
Mastercraft Homes Group. LLC
3165 Red Hill Avenue
Costa Mesa, CA 92626

Contract Date: August 5, 2020

The following change is hereby made a part of the Contract Documents enumerated in the Short Form Contract on the date referenced above and shall be performed under the same terms and conditions as required by the original Contract Documents. Except as modified herein, the original Contract Documents and all prior amendments shall remain in full force and effect and all of the terms of the Contract Documents are hereby incorporated in this Change Order.

The Contract is changed as follows:

Task 12 – Task 12 shall be added to the scope with the following description: Presentation Package for the County, Stakeholders, and Community. The work shall include colored site plans and colored architecture – **Cost \$16,827. MBI management shall be billed T&M.**

Task 13 – Task 11 shall be added to the scope of work with the following description: Project Design – Draft two new site plans using the using the revised building limits from Helix.. **Cost - \$3,960. MBI management shall be billed T&M.**

Task 7 - On-going Project Management – Mastercraft Residential shall assist with the FEMA Modeling, Project Design and Biological and Fire review. **\$8,000**

The Original Contract Price was	\$ 122,324.00
Net change by previous Change Orders was	\$ 25,000.00
The Contract Price prior to this Change Order was	\$147,324.00
The Contract Price will be changed by this Change Order	\$ 28,787.00
The new Contract Price including this Change Order will be.....	\$ 176,111.00

The Contract Time will be increased by: (0) calendar days

This Change Order is in full compromise and settlement of all adjustments to Contract Time and Contract Price, and compensation. By execution of this Change Order, Consultant agrees that this Change Order constitutes a complete accord and satisfaction with respect to all claims for schedule extension, Impacts, or any costs of whatsoever nature, character or kind arising out of or incidental to this Change Order.

Consultant

District

Accepted by:

Accepted by:

(Signature)

(Signature)

(Print or Type Name)

(Print or Type Name)

Date:

7/27/21

Date:

Rainbow Municipal Water District

PROJECT NAME

**REQUEST FOR PROPOSAL (RFP)
for**

TYPE OF SERVICES

MONTH YEAR

Highlighted areas are notes to the user or text that needs to be edited.

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SECTION 1 – PROJECT BACKGROUND, DESCRIPTION, GOALS, AND OBJECTIVES

1.1 Project Background and Description

The Rainbow Municipal Water District (RMWD or District) provides water and sanitation services to the unincorporated communities of Rainbow, Bonsall, and portions of Vista, Oceanside, and Fallbrook. The district maintains over 320 miles of water main, 7 pump stations, 4 reservoirs, and 13 storage tanks to deliver water to its customers.

Write a thorough project background and description. Reference project reports and documents that the consultants can reference for more information. The better the consultant understands the project, the better proposal the District will get.

1.2 Project Goals and Objectives

Write a thoughtful description of the goals and objectives of the project. The better the consultant understands the District's expectations, the better proposal the District will get.

SECTION 2 – ANTICIPATED SCOPE OF WORK

Provide a detailed scope of work that you want the consultant to provide. Some possible tasks are listed below. Provide a project schedule and any constraints the project/District has. The district has an estimated budget of \$XXXXX for this work.

The district is interested in the Consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposed scope of services.

General Services

- Project management
- Meetings
- Quality Control/ Quality Assurance
- Review previous project work.

Project Planning Services

- Project specific planning.
- Pipeline alignment studies.
- Reservoir or pump station planning and siting studies.
- Master planning or programmatic planning.
- Feasibility studies.
- Facility rehabilitation or replacement.
- Hydraulic Analysis.
- California Environmental Quality Act (CEQA) Documents

Design Services

- Preliminary design reports.
- Right of way and property requirements and acquisition.
- Special construction and project permitting.

- Agency meetings and approvals.
- Construction cost estimates and scheduling.
- Support for CEQA processes.
- Support for public outreach process.
- Surveying and mapping.
- Geotechnical or other investigations.
- Utility record research and design review with owners.
- Potholing
- Traffic control approach and/or plans.
- Plans and specifications.
- Progress submittals at 50%, 90%, 100%, and Final levels of completion.

Construction Services – Pre-bid and Bid Phases

- Constructability Review .
- Pre-bid meeting, agenda, notes, addendum.
- Responses to questions.
- Bid evaluation.

Construction Services - Construction Management Services

- Contract Administration/Coordination
- Meeting Facilitation
- Monthly Progress Report
- Request for Information (RFI's), Shop Drawings and Submittal Review
- Change Orders
- Claims Avoidance and Analysis
- Progress Payment Review
- Schedule (Baseline & Monthly Updates)
- Electronic Document Control
- Public Relations
- Project Closeout

Construction Services - Engineering During Construction

- Field meetings, resolution of issues.
- Responses to RFIs.
- Change order analysis and preparation.
- Record drawings.

Construction Services - Construction Observation & Documentation

- Daily Field Inspections
- Material Testing & Special Inspection
- Photo Documentation
- As-Built Record Drawings

- SWPPP

The following information and services will be made available to the consultant by the District:

- 100 percent plans and specifications and environmental documents.
- Arrange for meetings with its engineering and operations staff to gather information and review approaches, planning, and designs.
- Furnish electronic copies (where available) of record drawings, project reports and related materials. Any original materials provided by the district or developed by the consultant during the duration of the project shall be returned to the district upon the completion of services.
- Answer questions regarding the Project at any time during all phases of the work.
- Make initial contact with customers and assist consultant with coordination.

SECTION 3 – PROPOSAL REQUIREMENTS

3.1 Date and Time of Receipt

Proposals are due to Mr. Chad Williams, no later than 4:00 P.M., **Month Day, Year**. Please submit an electronic copy of the proposal and cost proposal (separate files) in PDF format to cwilliams@rainbowmwd.com and drubio@rainbowmwd.com.

3.2 Proposal Formatting

Proposals shall be concise, well organized, and demonstrate the consultant’s qualifications and experience applicable to the Project. The district is only accepting **electronic proposals** for this solicitation. Each proposal shall be limited to **15** one-sided pages (8 1/2" x 11"), exclusive of front and back cover, dividers, resumes and organizations chart, and appendices. Limit resumes to 2 pages each. The proposal should be signed by an individual authorized to execute legal document on behalf of the CM. Proposal and/or modifications thereto received after thereto the date specified herein will not be considered. The proposals will be distributed to a selection committee for their evaluation.

3.3 Proposal Content

Responders will be evaluated based on the information submitted according to the following items. Failure to provide this information may be cause for rejection of the proposal.

a) *Executive Summary*

Short summary of the entire Proposal describing the highlights of the Proposal.

b) *Identification of Responder*

- Legal name and address of company.
- Legal form of company (partnership, corporation, joint venture, etc.). If the company is a joint venture, identify the members of the joint venture and provide all information required under this section for each member. If company is a wholly owned subsidiary of a "parent company," identify the "parent company."
- Number of years that the company has maintained a local office.

- Number of employees in the office.
- Name, title, address, and telephone number of person to contact concerning the Proposal.
- Name, title, address, and telephone number of person who will sign the agreement if selected for the project.

c) *Experience*

Describe the firm's experience in completing similar consulting efforts. List at least three (3) successfully completed similar projects and include the following information about the client for each project: the client's name, project manager/contact person, and phone numbers. Also describe the type of work performed and value of consulting contract. The district will consider consulting projects currently being performed.

d) *Proposed Approach to Accomplish the Work*

Describe your approach to the scope of work items identified in Section 2 above. Identify project constraints. Describe any suggested enhancements to the scope and creative ideas for accomplishing the project objectives.

e) *Project Team, Project Organization, and Key Personnel*

Provide an organization chart and proposed staffing plan, based upon the scope of work, and estimated project schedule, showing personnel by title, position, and name. Staff shown in the proposal will be assumed to be available for the duration of the contract. Describe the specific background, qualifications and capabilities of the designated project manager and support staff. The proposal should identify all individuals who will perform and oversee work on this project. Indicate the role and responsibilities of the prime CM and all subconsultants. Key personnel assigned to the project shall not be reassigned without prior approval and the CM shall request approval of the District before any new personnel are assigned to the project. The District reserves the right to reject or remove personnel performing services in this contract in its sole discretion.

f) *Statement on Conflicts of Interest*

The CM shall submit a statement verifying that personal and organizational conflicts of interest prohibited by law do not exist, in conformance with the District's Standard Agreement for Professional Services. Any documentation required by the district shall be submitted by the CM and all sub-consultants.

g) *Statement on Professional Service Agreement*

The CM shall provide a statement that they are willing to execute the district's professional services agreement (**Exhibit A**) with no modifications.

h) *Consultant Proposed Scope of Work, Hours, and Cost Proposal (Separate File)*

A cost proposal shall be submitted as a separate file which states a total fee, not-to exceed upper limit for the work. Payment for professional services will be time and material based on: (1) actual base hourly labor rates, and (2) direct costs. The only direct costs allowed to be billed by the CM and subconsultants are mileage at the IRS rate. Costs for cell phone, laptop, IT, MIS, computer usage, overhead resource charges, and similar related costs should be included in each individual labor rate. Separate charges or multipliers will not be considered by the district. The maximum subconsultant markup allowed is 10%. Provide an estimated cost analysis for the following items:

- Total fee for each task listed in the Scope of Work
- Labor (personnel classifications, estimated hours and hourly rates)
- Direct costs
- Subcontracts

3.4 Pre-Submittal Activities

Questions concerning this Request for Proposals should be directed in writing by email to:

RAINBOW MUNICIPAL WATER DISTRICT
ATTN: Chad Williams, Engineering and CIP Program Manager
3707 Old Highway 395
Fallbrook, CA 92028
cwilliams@rainbowmwd.com

No pre-proposal meeting is planned to be held regarding this RFP. Individual 30-minute technical meetings with consultant teams who are seriously competing for the project will be scheduled. The meetings are intended to answer questions and discuss ideas, which will be kept confidential. Do not discuss team qualifications at the meetings. Prior to the meetings, the interested consultant teams should have thoroughly reviewed the background information. The proposed consultant project manager and project engineer may attend the meeting. Schedule meetings through Delia Rubio, drubio@rainbowmwd.com.

SECTION 4 – CONSULTANT NOMINATION AND SELECTION PROCESS

4.1 Selection

A Consultant Selection Panel (Panel) will be established for this project and will include representatives from the District, and if deemed in the District's best interests, other persons from outside the District qualified to evaluate the proposals. The Panel will evaluate the Proposals based on the information submitted.

The District anticipates selecting a CM based on the proposals received but reserves the right to interview selected firms. The District will rank the finalists as to qualifications and select the successful CM.

If necessary, the District will enter into negotiations with the selected firm. The scope of work provided in the proposal will be used as a basis for contract negotiations. Negotiations will cover: scope of work, contract terms and conditions, and price. If the District is unable to reach an acceptable agreement with the selected firm, the District will terminate negotiations with the selected firm and negotiations with the second ranked firm will be initiated.

After negotiating a proposed agreement that is fair and reasonable, the negotiating team will recommend to the General Manager that the District enter into the proposed agreement. The General Manager will make the final recommendation to the District's Board of Directors,

concerning the proposed agreement. Final authority to approve the agreement rests with the District’s Board of Directors. A contract is expected to be presented to the Board of Directors for consideration at their **Month Day, Year** meeting.

4.2 Evaluation Criteria

The Proposals will be evaluated based on the minimum following criteria. Other factors may be considered by during Proposal review.

Approach to Work (30%)

- Understanding of project and objectives
- Responsiveness to issues identified in RFP
- Level of detail discussed
- Other issues not addressed in RFP but deemed essential to the effective conduct of the project
- Tasks clearly defined
- Activities well-coordinated
- Flexibility to changes in scope and schedule
- Provisions for technical and quality control

Project Manager and Team Qualifications (45%)

- Specialized Qualifications of the Project Manager and Team
- Involvement and commitment of key personnel
- Ability to perform within schedule with assigned staff
- Current depth of technical expertise in firm

Project Experience (25%)

- Experience and Performance on similar projects
- Proven specialization of the firm on similar projects

4.3 Schedule for Nomination, Selection and Award

The district anticipates that the process for nominating and selecting a CM, and awarding the contract, will be according to the following tentative schedule:

- | | |
|---------------------------------------|------|
| • Issue RFP | DATE |
| • Pre-proposal Meeting | DATE |
| • Last Day for Questions | DATE |
| • Last Day for Meetings with District | DATE |
| • Proposals Due | DATE |
| • Notification of Selection | DATE |
| • Completion of Contract Negotiations | DATE |
| • Draft Board Memo | DATE |
| • Board Approval | DATE |

SECTION 5 – CONDITIONS FOR PROPOSERS

5.1 Rights of The Agency

The District may investigate the qualifications of any Proposer under consideration, may require confirmation of information furnished by a Proposer, and may require additional evidence of qualifications to perform the Work described in the RFP. Agency reserves the right, in its sole and absolute discretion to take any of the following actions:

- Reject any or all Proposals and issue a new RFP.
- Cancel, modify, or withdraw, or extend the RFP.
- Issue Addenda, supplements, and modifications to this RFP.
- Modify the RFP process (with appropriate notice to Proposers).
- Appoint a selection committee and evaluation teams to review Proposals and seek the assistance of outside technical experts in the Proposal evaluations.
- Approve or disapprove the use of particular Subcontractors and/or substitutions and/or changes in Proposals.
- Revise and modify, at any time before the Proposal due date, the factors it will consider in evaluating Proposals and to otherwise revise or expand its evaluation methodology. If such revisions or modifications are made, the district will provide an Addendum to all registered Proposers setting forth the changes to the evaluation criteria or methodology. The District may extend the Proposal due date if such changes are deemed by the district, in its sole discretion, to be material and substantive.
- Hold meetings and exchange correspondence with the Proposers responding to this RFP to seek an improved understanding and evaluation of the Proposals. If individual Proposer informational meetings are held, all Proposers submitting a responsive Proposal shall be afforded an opportunity to participate in an individual Proposer informational meeting.
- Seek or obtain data from any source that has the potential to improve the understanding and evaluation of the Proposals.
- Waive weaknesses, informalities, and minor irregularities in Proposals.
- Reject the Proposal from any team that changes its Proposal after the submittal due date and time without following the procedures of this Proposal and without Agency written approval.

5.2 Changes to the RFP

This RFP is subject to revision via written addenda, which will be provided via e-mail to all proposers.

5.3 Protests

~~Any protest to the District's action must be in writing and shall be received by the District within 5 business days of following such action. Any protest not set forth in writing or received within 5 business days of the protested action will not be considered. The District may, in its sole discretion, discuss the protest with the protestor. No hearing will be held on the protest. The District will decide the protest on the basis of the written submissions and will issue a written decision regarding any protest.~~

5.3 Special Conditions

This RFP does not commit the District to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. All proposals submitted in response to this RFP become the property of the District and are public records, and as such may be subject to public review.

The District reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to selection schedule, submittal date, and submittal requirements. The District reserves the right to reject all proposals and terminate the project. If the District cancels or revises the RFP, rejects all Proposals, or terminates the project, all proposers will be notified in writing by the District.

The selected CM will be required to sign an Agreement for Professional Services (**Exhibit A**) and to provide the Insurance Certificates and all other required documentation within ten (10) calendar days of notification of selection.

DRAFT

Rainbow Municipal Water District

PROJECT NAME

**REQUEST FOR PROPOSAL (RFP)
for
CONSTRUCTION MANAGEMENT
SERVICES**

MONTH YEAR

Highlighted areas are notes to the user or text that needs to be edited.

Table of Contents

SECTION 1 – PROJECT BACKGROUND, DESCRIPTION, AND OBJECTIVES

- 1.1 Project Background and Description
- 1.2 Project Objectives

SECTION 2 – ANTICIPATED SCOPE OF WORK

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SECTION 1 – PROJECT BACKGROUND, DESCRIPTION, GOALS, AND OBJECTIVES

1.1 Project Background and Description

The Rainbow Municipal Water District (RMWD or District) provides water and sanitation services to the unincorporated communities of Rainbow, Bonsall, and portions of Vista, Oceanside, and Fallbrook. The district maintains over 320 miles of water main, 7 pump stations, 4 reservoirs, and 13 storage tanks to deliver water to its customers.

Write a thorough project background and description. Reference project reports and documents that the consultants can reference for more information. The better the consultant understands the project, the better proposal the District will get.

1.2 Project Goals and Objectives

Write a thoughtful description of the goals and objectives of the project. The better the consultant understands the District's expectations, the better proposal the District will get.

SECTION 2 – ANTICIPATED SCOPE OF WORK

Provide a detailed scope of work that you want the consultant to provide. Some possible tasks are listed below based on the Thoroughbred LS CM RFP. Provide a project schedule and any constraints the project/District has.

The district is interested in the Consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposed scope of services.

The Construction Manager (CM) consultant shall provide sufficient staff to provide construction management and inspection services for the Project. The CM will ensure that the projects are constructed per the plans and specifications, constructed on time and budget, facilitate communication between the Contractor and third parties, prepare and maintain construction documentation. The duties of the CM shall include all efforts described in Division 1 of the Contract Documents and as are otherwise required for internal or document controls. In general, these services are anticipated to include but are not limited to the following items. The district has an estimated budget of \$XXXXX for this work. The consultant shall assume one month for prebid services, 24-month construction duration starting with the contractor's Notice to Proceed and three-month post construction closeout period.

The district is interested in the Consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposed scope of services.

Task A-Prebid Services

2.A.1 Constructability Review

Review of the 100% plans and specification prior to bid within five (5) working days of receipt. Meeting facilitation shall include, but not be limited to make certain that the work requirements are clear, the documents are coordinated, and any obstacles to construction are addressed prior to bid. The review is not to focus on the design parameters of the project.

2.A.2 Bid Assistance

Assist the District in conducting and documenting the pre-bid meeting. Assist the District in responding to contractor questions and preparing and distributing an addendum.

Task B-Construction Management Services

2.B.1 Contract Administration/Coordination

The CM shall act as the primary contact for the District and shall provide coordination between the District, Engineer/ Project Manager, Contractor, Specialty Inspectors, Utilities (e.g. SDG&E), and other jurisdictional agencies as appropriate including all permits. The CM shall meet with the District prior to the preconstruction meeting to thoroughly review the project plans and specifications, coordination with required agencies, and environmental constraints and conditions.

2.B.2 Meeting Facilitation

The CM shall work with the district staff to organize and conduct a preconstruction meeting, weekly progress meetings during construction, and as-needed meetings for the project. For each meeting, the CM shall prepare an agenda for the meeting, document the meeting with minutes of the meeting, and distribute the meeting minutes to the project team within five (5) working days.

2.B.3 Monthly Progress Report

Each month, the CM shall issue a monthly progress report which shall be illustrated with photos. It shall summarize progress, schedule, issues and challenges, budget, any quality control issues and other relevant information as identified below:

- A summary of the main accomplishments over the previous month
- Highlight any unresolved issues discussed during the biweekly meetings
- A summary of current construction activities
- Photographs of representative project activities
- A summary of progress payments, change orders, disputes, submittals, RFIs and Notices of Noncompliance
- Identification of key problems, action items and issues and include recommendation for solutions.
- Overall Contractor's conformance to the contract schedule and quality requirements
- Schedule updates

2.B.4 Request for Information (RFI's), Shop Drawings and Submittal Review

The CM shall log and review all incoming RFIs and submittals and provide recommendations to the District. The District shall have final review and approval on all submittals. Technical submittals shall be routed to the Engineer. Administrative submittals, including but not limited to the construction schedule, schedule of values, permits, SWPPP, easement documents, shall be reviewed by the CM. The CM will coordinate with District staff on the review of critical construction related submittals as required, including construction schedule, traffic control, sequencing, construction staging, shutdowns, pipeline testing & disinfection, earthwork,

materials, and connections. As required, coordinate evaluation of "or-equal" or product substitution requests with the Design Engineer, the District, vendors, manufacturers, and others. Prepare evaluation and recommendation for "or-equal" or product substitution request as necessary. Hard copies are not necessary unless requested by the district or to facilitate discussion with the Contractor. Submittals shall be on District forms and all submittal responses shall be reviewed by the district prior to returning to the Contractor. The CM shall compare the submittals against the submittal review log to ensure that all required submittals have been accounted for and logged. Initial RFI review shall be for completeness and compliance to contract administration procedures. The CM shall discuss both RFI and shop drawing submittals with the design engineer of record and District, providing relevant information as to field conditions and schedule priorities to assist in facilitating the technical review. The CM shall maintain a standing item on the weekly progress meeting agenda to review and discuss all outstanding RFIs and submittals. Data shall be maintained at a speed in which RFI's and submittals are responded to so outstanding items are not permitted to impact the progress of the project. All RFIs and shop drawing review responses shall be reviewed by the CM prior to returning them to the Contractor to ensure responses and comments comply with the construction contract.

2.B.5 Change Orders

The CM shall review all change order requests and associated documents for the validity, cost, and schedule impacts. Validity will be established on a case-by-case basis by comparison of the scope change request with the construction contract requirements and consultation with the District's Project Manager and the design engineer. The CM shall manage change orders to obtain a fair and reasonable price for legitimate extra work items including keeping a log, weekly updates, and providing timely responses. The CM shall request, and log change order (extra work) quotations as requested by the District or Contractor and shall coordinate the preparation of any revised specifications and/or sketches needed to define the scope of the extra work. The CM shall verify change order work performed on a time-and-materials basis daily. The CM shall track change order work activities using a CPM schedule to verify time extension impacts accompanying the change order. The CM shall prepare necessary cost estimates to compare and negotiate the Contractor's costs as required. The CM shall prepare a recommendation for acceptance or rejection of the terms of the change order to the district. If the change order is accepted, the CM shall prepare the document for signature. If there is disputed extra work, the CM shall work with the District and Contractor until the item has been satisfactorily resolved. If it is not resolved, the CM shall track the item as a potential claim. Each change order may contain several items. Hard copies are not necessary unless requested by the district or to facilitate discussion with the Contractor. Change orders shall be on District forms.

2.B.6 Claims Avoidance and Analysis

Throughout the project the CM shall actively work to identify and to resolve disputes fairly, to keep work moving on schedule, and ultimately to achieve superior quality in the final product. Should a dispute occur, the CM shall prepare a claim analysis report and work to resolve the dispute at the lowest level and at the earliest opportunity. The CM shall hold regular meetings to discuss outstanding dispute issues and to actively work toward the resolution.

2.B.7 Progress Payment Review

CM shall review Contractor's monthly progress payment requests for agreement with physical progress in the field and adjust the requests as necessary to include any special withholdings associated with non-compliant work. CM shall review the draft progress payments with the Contractor so any corrections can be made before formal submission. As part of the progress payment review process, the CM shall review the Contractor's as-builts, any required traffic control plans, and required storm water pollution prevention plan records to ensure they are up to date and fully compliant with the contract and permit requirements. The CM shall confirm with the district as part of the review process that the Contractor's required payroll records are correct and up to date. The Project Redlines (as-builts) are to be current prior to approval of the monthly progress payment.

2.B.8 Schedule (Baseline & Monthly Updates)

The CM shall meet with the Contractor prior to the initial baseline schedule submittal to discuss the contract requirements and review in general the Contractor's intended work plan. Once the baseline schedule submittal has been received, the CM shall review and analyze it for contract compliance, viability, and to confirm the project float has not been inappropriately impacted. Once the baseline schedule is approved, the CM shall review the monthly updates for changes to the accepted baseline schedule. Requests for time submitted by the Contractor shall also be reviewed for merit, and appropriate recommendations shall be made to the District. The monthly schedule update analysis shall be to determine effect and appropriateness of schedule revisions to the Critical Path in relation to base contract Work, delays caused by the Contractor and Work added by change orders. The CM's findings shall be returned to the Contractor.

2.B.9 Electronic Document Control

The CM The consultant shall utilize an electronic document control system for managing the electronic and hard copy files, maintaining a logging system including dates received and returned of all documents (submittals, RFI, correspondences, etc.). The consultant shall:

- upload and link files,
- provide notifications of overdue items,
- provide responses online,
- track average turn-around time,
- track rejected and to be re-submitted items,
- manage personnel access to data depending on project role,
- electronic signature/stamping,

All data shall remain the sole property of RMWD and be provided to RMWD in an accessible format when projects are complete and/or the system is discontinued.

2.B.10 Public Relations

The CM shall coordinate with the district and be available to answer questions or concerns from the public. The CM shall budget to attend and provide project updates at two (2) Board of Director's meetings for each project.

2.B.11 Project Closeout

The CM shall plan, coordinate, and assist with the closeout process for each project phase beginning with start-up, testing, and commissioning as required by the construction documents, and continue through the creation of a contract punch list, the final job walk, and assist the District in the filing of the notice of completion (NOC). The CM will perform all needed inspections associated with the punch listed work, coordinating site visits by permit agencies to obtain permit sign off, estimating the retainage for punch listed items, reviewing and organizing guarantees, certificates and warranties, ensuring that all permits have been signed off, delivery of operation and maintenance manuals and comments resolution, and working with the District to ensure that all required contract items have been provided, all punch list items have been resolved, as-builts have been accepted and a NOC has been filed. The CM shall ensure that all responsible parties have signed warranties, guarantees, and equipment systems certifications so that they are properly in-force. Should there be any open disputes, the CM shall work with the Contractor and the District staff to resolve them fairly and in a reasonable manner.

Task C-Construction Observation & Documentation

2.C.1 Daily Field Inspections

The CM shall perform daily field inspections of the construction Work for compliance with the contract and applicable permit and code requirements. Inspections shall be documented on District-approved inspection forms with daily inspection reports itemizing the on-site manpower, the on-site sub-contractors, and the activities undertaken by the Contractor that day. Copies of the daily Field Inspection Reports shall be distributed to team members and the original signed copy shall be filed in the project file. The Construction Inspector shall be completely familiar with project plans and specifications as well as with all current District standard specifications, applicable codes, all permit requirements, all storm water pollution prevention requirements and regulations, traffic control requirements, public and job safety, and the project schedule. Each day the Construction Inspector shall walk the jobsite, meet with the Contractor's superintendent and review RFIs, change order requests, and submittals. The Construction Inspector will check that all project materials on the project site have an associated approved submittal and that any needed special inspections or tests required are scheduled. Working with the District, the Construction Inspector shall coordinate with all parties on the project and be available to answer local resident and business owner questions about project issues or concerns. When noncompliant work is identified, the Construction Inspector shall issue a finding on the noncompliance and if the noncompliance is not resolved by the end of the payment cycle, the Construction Inspector will recommend an appropriate withhold amount until the issue has been corrected. It is noted that noncompliant work includes but is not to be limited to issues with permits, contract specifications, building codes, storm water pollution prevention requirements, traffic control, noise, work hour violations, or other project related issues. The Construction Inspector shall provide and maintain equipment necessary to monitor noncompliant work. A running log of field issues with photographs of the specific concerns shall be maintained. The Construction Inspector shall review the log at the weekly progress meetings to ensure the Contractor understands the issue and addresses it in a timely manner. A special withholding from

the Contractor's progress payment may be recommended for significant issues for which the progress toward issue resolution of the issue does not occur in a timely manner.

2.C.2 Material Testing & Special Inspection

The CM shall provide all material and geotechnical testing and special inspection for the Project either in-house or through a third-party firm. The CM shall review all Contractor requests for materials testing or special inspection and if upon such review finds the work is ready for special inspection and/or materials testing shall schedule the needed special inspections and testing. The CM shall provide all equipment and services for the specialty inspections including but not limited to the following:

- NACE level 3 certified inspector to inspect all painted and coated surfaces requiring cathodic protection, or as specified
- Welding
- Reinforcing steel placement
- Anchors and dowels
- Welding for rebar and other structural steel

The CM shall coordinate with third party services for material testing including but not limited to the following:

- Compaction/geotechnical
- Concrete
- Grout

A log shall be maintained of site visits by the special inspector and testing staff. A file of all testing and special inspection results shall be maintained on site in the project file.

2.C.3 Photo Documentation

The Construction Inspector shall take photos daily and will regularly submit them to the District's Project Manager to document the work being done. The CM shall also use them to assist the design engineer in understanding the field situations which may be associated with an RFI or change order. Selected photos will be used in the monthly report and all photos shall be labeled, dated and made available to the project team.

2.C.4 As-Built Record Drawings

The Construction Inspector shall incorporate all RFIs, field memos, and change orders on the CM's record set of construction drawings. The Construction Inspector shall also note daily on the record set as-built dimensional or other changes which occur in the field. The Inspector shall use the drawing to document the project during the progress payment review process. The CM/ Construction Inspector is responsible for verifying the Contractor is updating the Project Redlines at the weekly progress meeting. The District will hold the CM/ Construction Inspector responsible for ensuring that the Project Redlines are up to date and accurate with the work that is installed. The district will withhold monthly progress payments to the CM/ Construction Inspector until the Contractor's Redlines are current.

Upon completion of the project, the Construction Inspector will sign and date the as-built set to certify that they are complete and correct. Once the activity is complete, the drawings will be turned over to the district.

2.C.5 SWPPP

The CM shall provide a qualified SWPPP Practitioner (QSP) to inspect the Contractor's storm water pollution prevention efforts and provide notification and documentation required by the latest version of the Construction General Permit without annulling the Contractor's responsibility to maintain a storm water pollution prevention compliant site and conform to all requirements and regulations. The CM shall assist the district as requested with utilization of the SMARTs system.

The following information and services will be made available to the CM by the District:

- a. 100 percent plans and specifications and environmental documents.
- b. Arrange for meetings with its engineering and operations staff to gather information and review approaches, planning, and designs.
- c. Furnish electronic copies (where available) of record drawings, project reports and related materials. Any original materials provided by the district or developed by the CM during the duration of the project shall be returned to the district upon the completion of services.
- d. Answer questions regarding the Project at any time during all phases of the work.
- e. Make initial contact with customers and assist CM with coordination.

SECTION 3 – PROPOSAL REQUIREMENTS

3.1 Date and Time of Receipt

Proposals are due to Mr. Chad Williams, no later than 4:00 P.M., **Month Day, Year**. Please submit an electronic copy of the proposal and cost proposal (separate files) in PDF format to cwilliams@rainbowmwd.com and drubio@rainbowmwd.com.

3.2 Proposal Formatting

Proposals shall be concise, well organized, and demonstrate the consultant's qualifications and experience applicable to the Project. The district is only accepting **electronic proposals** for this solicitation. Each proposal shall be limited to **15** one-sided pages (8 1/2" x 11"), exclusive of front and back cover, dividers, resumes and organizations chart, and appendices. Limit resumes to 2 pages each. The proposal should be signed by an individual authorized to execute legal document on behalf of the CM. Proposal and/or modifications thereto received after thereto the date specified herein will not be considered. The proposals will be distributed to a selection committee for their evaluation.

3.3 Proposal Content

Responders will be evaluated based on the information submitted according to the following items. Failure to provide this information may be cause for rejection of the proposal.

a) *Executive Summary*

Short summary of the entire Proposal describing the highlights of the Proposal.

b) Identification of Responder

- Legal name and address of company.
- Legal form of company (partnership, corporation, joint venture, etc.). If the company is a joint venture, identify the members of the joint venture and provide all information required under this section for each member. If company is a wholly owned subsidiary of a "parent company," identify the "parent company."
- Number of years that the company has maintained a local office.
- Number of employees in the office.
- Name, title, address, and telephone number of person to contact concerning the Proposal.
- Name, title, address, and telephone number of person who will sign the agreement if selected for the project.

c) Experience

Describe the firm's experience in completing similar consulting efforts. List at least three (3) successfully completed similar projects and include the following information about the client for each project: the client's name, project manager/contact person, and phone numbers. Also describe the type of work performed and value of consulting contract. The district will consider consulting projects currently being performed.

d) Proposed Approach to Accomplish the Work

Describe your approach to the scope of work items identified in Section 2 above. Identify project constraints. Describe any suggested enhancements to the scope and creative ideas for accomplishing the project objectives.

e) Project Team, Project Organization, and Key Personnel

Provide an organization chart and proposed staffing plan, based upon the scope of work, and estimated project schedule, showing personnel by title, position, and name. Staff shown in the proposal will be assumed to be available for the duration of the contract. Describe the specific background, qualifications and capabilities of the designated project manager and support staff. The proposal should identify all individuals who will perform and oversee work on this project. Indicate the role and responsibilities of the prime CM and all subconsultants. Key personnel assigned to the project shall not be reassigned without prior approval and the CM shall request approval of the District before any new personnel are assigned to the project. The District reserves the right to reject or remove personnel performing services in this contract in its sole discretion.

f) Statement on Conflicts of Interest

The CM shall submit a statement verifying that personal and organizational conflicts of interest prohibited by law do not exist, in conformance with the District's Standard Agreement for Professional Services. Any documentation required by the district shall be submitted by the CM and all sub-consultants.

g) Statement on Professional Service Agreement

The CM shall provide a statement that they are willing to execute the district's professional services agreement (**Exhibit A**) with no modifications.

h) Consultant Proposed Scope of Work, Hours, and Cost Proposal (Separate File)

A cost proposal shall be submitted as a separate file which states a total fee, not-to exceed upper limit for the work. Payment for professional services will be time and material based on: (1) actual base hourly labor rates, and (2) direct costs. The only direct costs allowed to be billed by the CM and subconsultants are mileage at the IRS rate. Costs for cell phone, laptop, IT, MIS, computer usage, overhead resource charges, and similar related costs should be included in each individual labor rate. Separate charges or multipliers will not be considered by the district. The maximum subconsultant markup allowed is 10%. Provide an estimated cost analysis for the following items:

- Total fee for each task listed in the Scope of Work
- Labor (personnel classifications, estimated hours and hourly rates)
- Direct costs
- Subcontracts

3.4 Pre-Submittal Activities

Questions concerning this Request for Proposals should be directed in writing by email to:

RAINBOW MUNICIPAL WATER DISTRICT
ATTN: Chad Williams, Engineering Manager
3707 Old Highway 395
Fallbrook, CA 92028
cwilliams@rainbowmwd.com

No pre-proposal meeting is planned to be held regarding this RFP. Individual 30-minute technical meetings with consultant teams who are seriously competing for the project will be scheduled. The meetings are intended to answer questions and discuss ideas, which will be kept confidential. Do not discuss team qualifications at the meetings. Prior to the meetings, the interested consultant teams should have thoroughly reviewed the background information. The proposed consultant project manager and project engineer may attend the meeting. Schedule meetings through Delia Rubio, drubio@rainbowmwd.com.

SECTION 4 – CONSULTANT NOMINATION AND SELECTION PROCESS

4.1 Selection

A Consultant Selection Panel (Panel) will be established for this project and will include representatives from the District, and if deemed in the District's best interests, other persons from outside the District qualified to evaluate the proposals. The Panel will evaluate the Proposals based on the information submitted.

The District anticipates selecting a CM based on the proposals received but reserves the right to interview selected firms. The District will rank the finalists as to qualifications and select the successful
CM.

If necessary, the District will enter into negotiations with the selected firm. The scope of work provided in the proposal will be used as a basis for contract negotiations. Negotiations will cover: scope of work, contract terms and conditions, and price. If the District is unable to reach an acceptable agreement with the selected firm, the District will terminate negotiations with the selected firm and negotiations with the second ranked firm will be initiated.

After negotiating a proposed agreement that is fair and reasonable, the negotiating team will recommend to the General Manager that the District enter into the proposed agreement. The General Manager will make the final recommendation to the District's Board of Directors, concerning the proposed agreement. Final authority to approve the agreement rests with the District's Board of Directors. A contract is expected to be presented to the Board of Directors for consideration at their **Month Day, Year** meeting.

4.2 Evaluation Criteria

The Proposals will be evaluated based on the minimum following criteria. Other factors may be considered by during Proposal review.

Approach to Work (30%)

- Understanding of project and objectives
- Responsiveness to issues identified in RFP
- Level of detail discussed
- Other issues not addressed in RFP but deemed essential to the effective conduct of the project
- Tasks clearly defined
- Activities well-coordinated
- Flexibility to changes in scope and schedule
- Provisions for technical and quality control

Project Manager and Team Qualifications (45%)

- Specialized Qualifications of the Project Manager and Team
- Involvement and commitment of key personnel
- Ability to perform within schedule with assigned staff
- Current depth of technical expertise in firm

Project Experience (25%)

- Experience and Performance on similar projects
- Proven specialization of the firm on similar projects

4.3 Schedule for Nomination, Selection and Award

The district anticipates that the process for nominating and selecting a CM, and awarding the contract, will be according to the following tentative schedule:

- Issue RFP **DATE**
- Pre-proposal Meeting **DATE**
- Last Day for Questions **DATE**

- Last Day for Meetings with District DATE
- Proposals Due DATE
- Notification of Selection DATE
- Completion of Contract Negotiations DATE
- Draft Board Memo DATE
- Board Approval DATE

SECTION 5 – CONDITIONS FOR PROPOSERS

5.1 Rights of The Agency

The District may investigate the qualifications of any Proposer under consideration, may require confirmation of information furnished by a Proposer, and may require additional evidence of qualifications to perform the Work described in the RFP. Agency reserves the right, in its sole and absolute discretion to take any of the following actions:

- Reject any or all Proposals and issue a new RFP.
- Cancel, modify, or withdraw, or extend the RFP.
- Issue Addenda, supplements, and modifications to this RFP.
- Modify the RFP process (with appropriate notice to Proposers).
- Appoint a selection committee and evaluation teams to review Proposals and seek the assistance of outside technical experts in the Proposal evaluations.
- Approve or disapprove the use of particular Subcontractors and/or substitutions and/or changes in Proposals.
- Revise and modify, at any time before the Proposal due date, the factors it will consider in evaluating Proposals and to otherwise revise or expand its evaluation methodology. If such revisions or modifications are made, the district will provide an Addendum to all registered Proposers setting forth the changes to the evaluation criteria or methodology. The District may extend the Proposal due date if such changes are deemed by the district, in its sole discretion, to be material and substantive.
- Hold meetings and exchange correspondence with the Proposers responding to this RFP to seek an improved understanding and evaluation of the Proposals. If individual Proposer informational meetings are held, all Proposers submitting a responsive Proposal shall be afforded an opportunity to participate in an individual Proposer informational meeting.
- Seek or obtain data from any source that has the potential to improve the understanding and evaluation of the Proposals.
- Waive weaknesses, informalities, and minor irregularities in Proposals.
- Reject the Proposal from any team that changes its Proposal after the submittal due date and time without following the procedures of this Proposal and without Agency written approval.

5.2 Changes to the RFP

This RFP is subject to revision via written addenda, which will be provided via e-mail to all proposers.

5.3 Protests

~~Any protest to the District's action must be in writing and shall be received by the District within 5 business days of following such action. Any protest not set forth in writing or received within 5 business days of the protested action will not be considered. The District may, in its sole discretion, discuss the protest with the protestor. No hearing will be held on the protest. The District will decide the protest on the basis of the written submissions and will issue a written decision regarding any protest.~~

5.3 Special Conditions

This RFP does not commit the District to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. All proposals submitted in response to this RFP become the property of the District and are public records, and as such may be subject to public review.

The District reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to selection schedule, submittal date, and submittal requirements. The District reserves the right to reject all proposals and terminate the project. If the District cancels or revises the RFP, rejects all Proposals, or terminates the project, all proposers will be notified in writing by the District.

The selected CM will be required to sign an Agreement for Professional Services (**Exhibit A**) and to provide the Insurance Certificates and all other required documentation within ten (10) calendar days of notification of selection.

Rainbow Municipal Water District

PROJECT NAME

**REQUEST FOR PROPOSAL (RFP)
for
PIPELINE REPLACEMENT OR
REHABILITATION DESIGN**

MONTH YEAR

Highlighted areas are notes to the user or text that needs to be edited.

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SECTION 1 – PROJECT BACKGROUND, DESCRIPTION, GOALS, AND OBJECTIVES

1.1 Project Background and Description

The Rainbow Municipal Water District (RMWD or District) provides water and sanitation services to the unincorporated communities of Rainbow, Bonsall, and portions of Vista, Oceanside, and Fallbrook. The district maintains over 320 miles of water main, 7 pump stations, 4 reservoirs, and 13 storage tanks to deliver water to its customers.

Write a thorough project background and description. Reference project reports and documents that the consultants can reference for more information. The better the consultant understands the project, the better proposal the District will get.

RMWD is requesting proposals from engineering firms to prepare planning, preliminary design, final design, plans, specifications, and contract documents for the _____ Pipeline Replacement or Rehabilitation. The pipeline will start at _____ and continue to a _____, a distance of approximately _____ feet. The project also includes a connection to the _____. RMWD is interested in considering both a new ____-inch pipeline and also rehabilitating the existing ____-inch steel pipeline. A potential pipeline replacement alignment option is shown in **Exhibit A**.

1.2 Project Goals and Objectives

Write a thoughtful description of the goals and objectives of the project. The better the consultant understands the District's expectations, the better proposal the District will get.

The key objectives of the Study include:

1. Evaluate options to rehabilitate the existing ____-inch _____ steel pipeline. Select feasible options and estimate costs.
2. Prepare a preliminary design of a ____-inch _____ pipeline replacement option and estimate costs.
3. Compare replacement and rehabilitation and make a recommendation to RMWD.
4. Prepare contract documents for bidding including the plans and specifications.
5. Provide support to the Environmental Documentation and Public Outreach efforts.

SECTION 2 – ANTICIPATED SCOPE OF WORK

Provide a detailed scope of work that you want the consultant to provide. Some possible tasks are listed below. The scope is for pipeline replacement or rehabilitation. If not considering rehabilitation, delete those sections. Provide a project schedule and any constraints the project/District has. The district has an estimated budget of \$XXXXX for this work.

RMWD envisions the following scope of services but is open to suggestions and modifications to improve the project.

The following items should be considered a framework for the scope of services to be used in proposal formation for the project. RMWD understands this RFP may not fully describe the services envisioned. Therefore, RMWD will be relying on the consultant to provide modifications or amplifying information to the scope of services described herein based on their professional expertise in this subject area. The consultant is encouraged to incorporate items deemed necessary to meet the needs of RMWD in completion of the project, including attending the necessary meetings with RMWD to gather information, receive input and approvals, and review preliminary results.

2.1 General Tasks

The consultant is expected to complete the following general tasks throughout the project:

A. *Project Management*

This task addresses the management responsibilities associated with proper scheduling review, budget control, invoice preparation and coordination with the District and Consultant's project team. Provide project management to achieve the project objectives and stay within budget and on schedule. Provide a monthly e-mail project status report. Notify RMWD immediately if any budget or schedule variances are expected. The email should include:

- Work completed over the past reporting period
- Progress anticipated over the next reporting period
- Next deliverable due date
- Information required from the District
- Any issues which would delay delivery of the project on time

B. *Quality Control/ Quality Assurance*

Prior to submitting any materials to RMWD or other agencies, provide QA/QC reviews in accordance with the Consultant's internal processes and procedures. The reviews will provide an independent check of the work. All submittals will indicate the name of the reviewer.

2.2 Planning, Hydraulics, Alignment Selection, and Preliminary Design Report.

A. *Review Previous Planning Work and Meet with District*

Review the planning work that has been completed, all other available data and information, and meet with RMWD to confirm the information and the approach. The Consultant's recommended approach will consider the previous planning work and new investigations.

B. *Evaluate Pipeline Rehabilitation Options*

Evaluate options to rehabilitate the existing _____ steel pipeline. RMWD does not have any approved rehabilitation methods, has very limited experience with rehabilitation, and will therefore rely of the Consultant's experience, evaluation, and recommendation. RMWD is not interested in pilot or demonstration projects for new technology. RMWD would prefer to bid at least two options, but only if they are recommended by the Consultant. Estimate the costs of the options. Estimate the remaining life of the pipeline after rehabilitation.

C. Pipeline Layout

Select a pipeline alignment and layout new pipelines, connections and disconnections, valve closures, new valves, shutdowns and nighttime work, and number of customers affected.

D. Hydraulic Analysis

Hydraulic analysis is not expected to be needed. If it is, it will be provided by RMWD.

E. Identify Right of Way and Property Needs

Identify any right of way or property that is needed for the pipeline and appurtenances. Identify any existing right of way or property rights along the proposed pipeline alignment. Provide this information in a technical memorandum to RMWD. Property acquisition will be completed by RMWD with support from the consultant.

F. Identify any Special Construction or Permit Areas

Identify any areas within the project that will require special construction techniques, traffic control, or permits. Identify any construction that will impact businesses or schools.

G. Meet with Jurisdictional Agencies

Meet with _____ to review the project and collect their comments and input. Identify permits and approvals, submittal requirements, fees, signature blocks, and processing time. For traffic control, identify and discuss with _____ the requirements for any special areas. Collect _____ traffic control requirements. Define pavement replacement requirements. RMWD staff will attend the meeting.

H. Agency Issue, Approval, and Permit Memorandum

Prepare a brief technical memorandum listing public agency and private utility

issues, approvals, and permits related to the project.

I. Construction Cost Estimate and Schedule

Prepare an opinion of probable construction cost broken down by the major items of work. The costs should be inflated to the mid-point of expected construction. If the estimate exceeds RMWD's budget, make suggestions on phasing or other changes to stay within budget. Prepare a construction schedule that shows, at a minimum, completion of the plans, bidding, award, construction, and start-up.

J. Prepare Draft and Final Preliminary Design Reports

Prepare a draft preliminary design report (PDR). Compare and contrast pipeline rehabilitation and replacement based on both cost, and non-cost factors. Recommend an option. Meet with RMWD to present and discuss the draft report. Revise the report, incorporating RMWD's comments and prepare the final PDR.

2.3 Support to Environmental Documentation, Permits, and Public Outreach

A. Provide Support to the Environmental Documentation Process

Provide technical information to support RMWD and their consultant in preparing and processing the environmental document. Identify any areas along the proposed alignment requiring special construction techniques due to environmental considerations, including, but not limited to, creek/drainage crossing, preservation areas, and traffic/hours of work. Identify and coordinate with RMWD's consultant the permit requirements of other regulatory agencies.

B. Provide Support to the XYZ Permit

Provide engineering support and graphics to _____ Permit from _____. Attend meetings with _____. Process the plans and specifications through the _____ and respond to their comments, as described in section FD.

C. Provide Support to the Public Outreach Process

Provide graphics support to RMWD's public outreach to the residential and commercial customers and community. Examples include aerial exhibits showing the proposed pipeline layout and proposed work areas.

2.4 Final Design, Plans, Specifications, and Cost Estimate

For the purposes of estimating the pipeline design effort required, the pipeline will extend in _____ Road from _____ to _____. The project includes approximately _____

feet of __-inch pipeline. If pipeline rehabilitation is selected, RMWD will work with the Consultant to develop a reduced design fee.

Submit Plans at 50%, 90%, 100%, and Final for construction levels of completion. Submit outline specifications at 50 percent, and complete specifications at 90 percent, 100 percent, and Final levels of completion.

- A. *Prepare Mapping*
Complete field and aerial surveys necessary to develop the base topographic mapping for design of the pipelines. Include surface features, existing utilities, and parcel, right-of-way, and easement lines. Conduct a field investigation to review survey information and utilities.

- B. *Geotechnical Investigation*
Complete a geotechnical investigation to support the pipeline design and prepare a summary report.

- C. *Utility Record Research*
Complete records research and coordinate with utilities and agencies to locate existing and proposed facilities in order to minimize disruptions to, or modifications of, all utilities impacted by the project. Plot utilities on the plans and resolve conflicts. Send plans to utility owners for review, follow-up to obtain comments, respond to comments, and modify contract documents, if needed.

- D. *Potholing*
Include a budget for _____ potholes of connections, crossings, and critical utilities.

- E. *Pipeline Plans, Specifications, and Estimate*
Prepare plans and specifications for the pipelines. The design drawings will be prepared in AutoCAD. RMWD will provide a sheet format and the “front end” contract documents which will be modified as required for the project by the Consultant. Meet with RMWD to review comments on the progress submittals.

Include a project-specific front-end contract, general and special conditions, and all relevant technical specifications required for construction of the project. The RMWD standard front-end specifications will be provided to the Consultant in MS Word format for review and editing. RMWD’s Standard Specifications and Drawings will be incorporated, where applicable.

Coordinate with the _____ on their design and construction requirements.
Process the plans through _____ and respond to comments.

F. *Traffic Control Plans*

In the plans and specifications, provide the contractors with the traffic control requirements, determined during the preliminary design, so that they can prepare traffic control plans. (Alternate – Prepare plans for traffic control during construction.)

G. *Property and Right of Way Acquisition*

Prepare plat maps and legal descriptions for any property or right of way acquisitions, including temporary construction easements and permanent easements. RMWD will acquire the property or easements.

H. *Construction Cost Estimate and Schedule*

Update the opinion of probable construction cost broken down by the major items of work. The costs should be inflated to the expected midpoint of construction. If the estimate exceeds RMWD's budget, make suggestions on phasing or other changes to stay within budget.

Update the construction schedule that shows, at a minimum, completion of the plans, bidding, award, construction, shutdowns, and start-up.

I. *Pre-Bid Assistance – Optional*

Attend a pre-bid meeting hosted by RMWD for prospective bidders and be available to answer questions at the meeting. Include preparation of an agenda for the pre-bid meeting.

Review and prepare written responses addressing technical questions submitted by the prospective bidders during the bid phase for inclusion in bid addenda. RMWD staff will prepare and transmit any necessary addenda to prospective bidders. Assume responding to up to five (5) technical questions.

J. *Engineering Services During Construction – Optional*

Attend three (3) field meetings to coordinate construction issues with the RMWD Representative.

Review and prepare written responses addressing Requests For Information (RFI) submitted by the contractor. Assume responding to up to five (5) RFI's.

Review and prepare written responses addressing construction Potential Change Orders (PCO) submitted by the contractor. Assume responding to up to five (5) PCO's.

2.5 Final Design Deliverables

- A. *50 Percent Submittal* – 3 Sets of full size plans (24" by 36"); 1 copy of technical specifications table of contents, all labeled "50 Percent Submittal"; opinion of probable construction cost and schedule; a memorandum describing agency coordination, permit and approval issues; pdf files of the submittal.
- B. *90 Percent Submittal* - 3 Sets of full size plans (24" by 36"); 2 sets of half size plans; 1 copy of front end and technical specifications, all labeled "90 Percent Submittal"; a table describing how RMWD's comments were addressed; opinion of probable construction cost and schedule; a memorandum describing agency coordination, permit and approval issues; pdf files of the submittal.
- C. *100 Percent Submittal* - 1 Set of full size plans; 1 copy of front end and technical specifications, all labeled "100 Percent Submittal"; a table describing how RMWD's comments were addressed; opinion of probable construction cost and schedule; a memorandum describing agency coordination, permit and approval issues; pdf, CAD, and Word files of the submittal.

Final 100 percent submittal-1Set full size mylars signed by RMWD incorporating all final District comments; 1 set of front end and technical specifications incorporating all final District comments; pdf, CAD, and Word files of the submittal.

The district is interested in the Consultant's creative ideas to improve the scope of services and they should be clearly identified in the proposed scope of services.

The following is a checklist of services you may want to consider including.

Project Planning Services

- Project specific planning.
- Pipeline alignment studies.
- Feasibility studies.
- Facility rehabilitation or replacement.
- Hydraulic Analysis.

- California Environmental Quality Act (CEQA) Documents

Construction Services – Pre-bid and Bid Phases

- Constructability Review .
- Pre-bid meeting, agenda, notes, addendum.
- Responses to questions.
- Bid evaluation.

Construction Services - Construction Management Services

- Contract Administration/Coordination
- Meeting Facilitation
- Monthly Progress Report
- Request for Information (RFI's), Shop Drawings and Submittal Review
- Change Orders
- Claims Avoidance and Analysis
- Progress Payment Review
- Schedule (Baseline & Monthly Updates)
- Electronic Document Control
- Public Relations
- Project Closeout

Construction Services - Engineering During Construction

- Field meetings, resolution of issues.
- Responses to RFIs.
- Change order analysis and preparation.
- Record drawings.

Construction Services - Construction Observation & Documentation

- Daily Field Inspections
- Material Testing & Special Inspection
- Photo Documentation
- As-Built Record Drawings
- SWPPP

The following information and services will be made available to the consultant by the District:

- 100 percent plans and specifications and environmental documents.
- Arrange for meetings with its engineering and operations staff to gather information and review approaches, planning, and designs.
- Furnish electronic copies (where available) of record drawings, project reports and related materials. Any original materials provided by the district or developed by the consultant during the duration of the project shall be returned to the district upon the completion of services.

- Answer questions regarding the Project at any time during all phases of the work.
- Make initial contact with customers and assist consultant with coordination.

SECTION 3 – PROPOSAL REQUIREMENTS

3.1 Date and Time of Receipt

Proposals are due to Mr. Chad Williams, no later than 4:00 P.M., **Month Day, Year**. Please submit an electronic copy of the proposal and cost proposal (separate files) in PDF format to cwilliams@rainbowmwd.com and drubio@rainbowmwd.com.

3.2 Proposal Formatting

Proposals shall be concise, well organized, and demonstrate the consultant’s qualifications and experience applicable to the Project. The district is only accepting **electronic proposals** for this solicitation. Each proposal shall be limited to **15** one-sided pages (8 1/2" x 11"), exclusive of front and back cover, dividers, resumes and organizations chart, and appendices. Limit resumes to 2 pages each. The proposal should be signed by an individual authorized to execute legal document on behalf of the CM. Proposal and/or modifications thereto received after thereto the date specified herein will not be considered. The proposals will be distributed to a selection committee for their evaluation.

3.3 Proposal Content

Responders will be evaluated based on the information submitted according to the following items. Failure to provide this information may be cause for rejection of the proposal.

a) *Executive Summary*

Short summary of the entire Proposal describing the highlights of the Proposal.

b) *Identification of Responder*

- Legal name and address of company.
- Legal form of company (partnership, corporation, joint venture, etc.). If the company is a joint venture, identify the members of the joint venture and provide all information required under this section for each member. If company is a wholly owned subsidiary of a "parent company," identify the "parent company."
- Number of years that the company has maintained a local office.
- Number of employees in the office.
- Name, title, address, and telephone number of person to contact concerning the Proposal.
- Name, title, address, and telephone number of person who will sign the agreement if selected for the project.

c) *Experience*

Describe the firm's experience in completing similar consulting efforts. List at least three (3) successfully completed similar projects and include the following information about the client for each project: the client's name, project manager/contact person, and phone numbers. Also describe the type of work performed and value of consulting contract. The district will consider consulting projects currently being performed.

d) *Proposed Approach to Accomplish the Work*

Describe your approach to the scope of work items identified in Section 2 above. Identify project constraints. Describe any suggested enhancements to the scope and creative ideas for accomplishing the project objectives.

e) *Project Team, Project Organization, and Key Personnel*

Provide an organization chart and proposed staffing plan, based upon the scope of work, and estimated project schedule, showing personnel by title, position, and name. Staff shown in the proposal will be assumed to be available for the duration of the contract. Describe the specific background, qualifications and capabilities of the designated project manager and support staff. The proposal should identify all individuals who will perform and oversee work on this project. Indicate the role and responsibilities of the prime CM and all subconsultants. Key personnel assigned to the project shall not be reassigned without prior approval and the CM shall request approval of the District before any new personnel are assigned to the project. The District reserves the right to reject or remove personnel performing services in this contract in its sole discretion.

f) *Statement on Conflicts of Interest*

The CM shall submit a statement verifying that personal and organizational conflicts of interest prohibited by law do not exist, in conformance with the District's Standard Agreement for Professional Services. Any documentation required by the district shall be submitted by the CM and all sub-consultants.

g) *Statement on Professional Service Agreement*

The CM shall provide a statement that they are willing to execute the district's professional services agreement (**Exhibit A**) with no modifications.

f) *Consultant Proposed Scope of Work, Hours, and Cost Proposal (Separate File)*

A cost proposal shall be submitted as a separate file which states a total fee, not-to exceed upper limit for the work. Payment for professional services will be time and material based on: (1) actual base hourly labor rates, and (2) direct costs. The only direct costs allowed to be billed by the CM and subconsultants are mileage at the IRS rate. Costs for cell phone, laptop, IT, MIS, computer usage, overhead resource charges, and similar related costs should be included in each individual labor rate. Separate charges or multipliers will not be considered by the district. The maximum subconsultant markup allowed is 10%. Provide an estimated cost analysis for the following items:

- Total fee for each task listed in the Scope of Work
- Labor (personnel classifications, estimated hours and hourly rates)
- Direct costs
- Subcontracts

3.4 Pre-Submittal Activities

Questions concerning this Request for Proposals should be directed in writing by email to:

RAINBOW MUNICIPAL WATER DISTRICT
ATTN: Chad Williams, Engineering and CIP Program Manager
3707 Old Highway 395

No pre-proposal meeting is planned to be held regarding this RFP. Individual 30-minute technical meetings with consultant teams who are seriously competing for the project will be scheduled. The meetings are intended to answer questions and discuss ideas, which will be kept confidential. Do not discuss team qualifications at the meetings. Prior to the meetings, the interested consultant teams should have thoroughly reviewed the background information. The proposed consultant project manager and project engineer may attend the meeting. Schedule meetings through Delia Rubio, drubio@rainbowmwd.com.

SECTION 4 – CONSULTANT NOMINATION AND SELECTION PROCESS

4.1 Selection

A Consultant Selection Panel (Panel) will be established for this project and will include representatives from the District, and if deemed in the District's best interests, other persons from outside the District qualified to evaluate the proposals. The Panel will evaluate the Proposals based on the information submitted.

The District anticipates selecting a CM based on the proposals received but reserves the right to interview selected firms. The District will rank the finalists as to qualifications and select the successful CM.

If necessary, the District will enter into negotiations with the selected firm. The scope of work provided in the proposal will be used as a basis for contract negotiations. Negotiations will cover: scope of work, contract terms and conditions, and price. If the District is unable to reach an acceptable agreement with the selected firm, the District will terminate negotiations with the selected firm and negotiations with the second ranked firm will be initiated.

After negotiating a proposed agreement that is fair and reasonable, the negotiating team will recommend to the General Manager that the District enter into the proposed agreement. The General Manager will make the final recommendation to the District's Board of Directors, concerning the proposed agreement. Final authority to approve the agreement rests with the District's Board of Directors. A contract is expected to be presented to the Board of Directors for consideration at their **Month Day, Year** meeting.

4.2 Evaluation Criteria

The Proposals will be evaluated based on the minimum following criteria. Other factors may be considered by during Proposal review.

Approach to Work (30%)

- Understanding of project and objectives
- Responsiveness to issues identified in RFP
- Level of detail discussed

- Other issues not addressed in RFP but deemed essential to the effective conduct of the project
- Tasks clearly defined
- Activities well-coordinated
- Flexibility to changes in scope and schedule
- Provisions for technical and quality control

Project Manager and Team Qualifications (45%)

- Specialized Qualifications of the Project Manager and Team
- Involvement and commitment of key personnel
- Ability to perform within schedule with assigned staff
- Current depth of technical expertise in firm

Project Experience (25%)

- Experience and Performance on similar projects
- Proven specialization of the firm on similar projects

4.3 Schedule for Nomination, Selection and Award

The district anticipates that the process for nominating and selecting a CM, and awarding the contract, will be according to the following tentative schedule:

- Issue RFP DATE
- Pre-proposal Meeting DATE
- Last Day for Questions DATE
- Last Day for Meetings with District DATE
- Proposals Due DATE
- Notification of Selection DATE
- Completion of Contract Negotiations DATE
- Draft Board Memo DATE
- Board Approval DATE

SECTION 5 – CONDITIONS FOR PROPOSERS

5.1 Rights of The Agency

The District may investigate the qualifications of any Proposer under consideration, may require confirmation of information furnished by a Proposer, and may require additional evidence of qualifications to perform the Work described in the RFP. Agency reserves the right, in its sole and absolute discretion to take any of the following actions:

- Reject any or all Proposals and issue a new RFP.
- Cancel, modify, or withdraw, or extend the RFP.
- Issue Addenda, supplements, and modifications to this RFP.
- Modify the RFP process (with appropriate notice to Proposers).
- Appoint a selection committee and evaluation teams to review Proposals and seek the assistance of outside technical experts in the Proposal evaluations.

- Approve or disapprove the use of particular Subcontractors and/or substitutions and/or changes in Proposals.
- Revise and modify, at any time before the Proposal due date, the factors it will consider in evaluating Proposals and to otherwise revise or expand its evaluation methodology. If such revisions or modifications are made, the district will provide an Addendum to all registered Proposers setting forth the changes to the evaluation criteria or methodology. The District may extend the Proposal due date if such changes are deemed by the district, in its sole discretion, to be material and substantive.
- Hold meetings and exchange correspondence with the Proposers responding to this RFP to seek an improved understanding and evaluation of the Proposals. If individual Proposer informational meetings are held, all Proposers submitting a responsive Proposal shall be afforded an opportunity to participate in an individual Proposer informational meeting.
- Seek or obtain data from any source that has the potential to improve the understanding and evaluation of the Proposals.
- Waive weaknesses, informalities, and minor irregularities in Proposals.
- Reject the Proposal from any team that changes its Proposal after the submittal due date and time without following the procedures of this Proposal and without Agency written approval.

5.2 Changes to the RFP

This RFP is subject to revision via written addenda, which will be provided via e-mail to all proposers.

5.3 Protests

~~Any protest to the District's action must be in writing and shall be received by the District within 5 business days of following such action. Any protest not set forth in writing or received within 5 business days of the protested action will not be considered. The District may, in its sole discretion, discuss the protest with the protestor. No hearing will be held on the protest. The District will decide the protest on the basis of the written submissions and will issue a written decision regarding any protest.~~

5.3 Special Conditions

This RFP does not commit the District to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFP, or to procure or contract for work. All proposals submitted in response to this RFP become the property of the District and are public records, and as such may be subject to public review.

The District reserves the right to cancel, in part or in its entirety, this RFP including, but not limited to selection schedule, submittal date, and submittal requirements. The District reserves the right to reject all proposals and terminate the project. If the District cancels or revises the RFP, rejects all Proposals, or terminates the project, all proposers will be notified in writing by the District.

The selected CM will be required to sign an Agreement for Professional Services (**Exhibit A**) and to provide the Insurance Certificates and all other required documentation within ten (10) calendar days of notification of selection.

DRAFT

**Section 5.02.110
Professional Services-Requests for Proposals**

While it is not required to formally advertise for competitive bids for professional services (consultants, architects, etc.), it is the policy of the District to prepare a comprehensive request for proposal (RFP).

The following items are the principal topics that should be included in any RFP.

- | | |
|--|--|
| Section 1.1 &
Section 2-Tasks A, B &
Section 2-First
Section 2-First
Section
Section
Section | <ol style="list-style-type: none">1. A complete description of the problem and the objectives of the project.2. An estimate, as close as possible, of the extent of the services required, including staff and resources and an indication of any monetary limits. Money limits in First3. A description of the overall work plan that the person/company offering the proposal is expected to carry out and an explanation of the relationship that is expected between that firm and District staff.4. A requirement for the starting and completion dates for each phase of the work plan.5. A requirement for a breakdown of estimated project costs, listing separately those attributable to expenses for such things as travel and phones, etc., and those for professional services.6. Require the identification and background of each member of the firm proposed to work on the project.7. Request a list of clients for whom the proposing firm has performed similar services in the recent past. |
|--|--|

It is not necessary to follow any specific format. The important issue is that all seven points are incorporated.

M:\Administration\Confidential\Administrative Code Current Policies\Title 5\Professional Services-Request For Proposal 5.02.110.docx\Approved 8-3-05 by Ordinance No. 05-07\Amended and Updated 2-26-13 by Ordinance No. 13-02\Amended and Updated 3-24-20 by Ordinance No. 20-05

AS-NEEDED CONTRACT EXPENDITURES REPORT

JULY 2021

CONTRACT INFO	FUND SOURCE	ASSIGN. NO.	STATUS	DATED	DESCRIPTION	AUTHORIZED AMOUNT	NOT TO EXCEED AMOUNT	INVOICED TO DATE	CURRENT BALANCE
Title: As-Needed Land Surveying Services Firm: Johnson-Frank & Assoc. Expires: 8/29/2022* (C#18-16) *One year extension.	NON-CIP	2019-01	Closed	5/14/2019	Topography - Dentre De Lomas Road repair.		\$ 5,115.40	\$ 5,115.40	
	NON-CIP	2019-02	Closed	8/6/2019	Easement review - McDowell / Mead.		\$ 4,100.00	\$ 1,404.25	
	NON-CIP	2020-03	Closed	9/19/2020	Survey & Reset Monument on Los Alisos Lane.		\$ 6,079.00	\$ 4,297.76	
	CIP	2021-04	Open	5/3/2021	Prepare Plat Map - Thoroughbred Lift Station		\$ 11,592.00	\$ -	
						\$ 50,000.00	\$ 26,886.40	\$ 10,817.41	\$ 39,182.59
Title: As-Needed Land Surveying Services Firm: KDM Meridian, Inc. Expires: 8/29/2022* (C#18-14) *One year extension.	NON-CIP	2018-01	Closed	9/11/2018	Stake easement on Morro Hills due to 20" watermain failure.		\$ 7,280.00	\$ 7,278.75	
	CIP	2019-02	Closed	1/9/2019	RMWD "Base Map" to perform in-house design of proposed water facilities on Via Ararat.		\$ 5,800.00	\$ 5,800.00	
	CIP	2019-03	Cancelled	---	Assignment Cancelled - 4 PTR Plottable Easements.		\$ -	\$ -	
	CIP	2019-04	Closed	4/24/2019	Stake easement on Gird Road for construction project.		\$ 5,400.00	\$ 5,400.00	
	CIP	2019-05	Closed	6/18/2019	Legal and Plat for Campbell - Via Ararat.		\$ 1,195.00	\$ 1,195.00	
	NON-CIP	2019-06	Closed	10/24/2019	Stake easement on Via Oeste Drive and Laketree Drive.		\$ 10,900.00	\$ 7,725.00	
	CIP	2019-07	Closed	11/8/2019	Easements for new PS on W. Lilac/Via Ararat.		\$ 4,100.00	\$ 1,100.00	
	NON-CIP	2020-08	Closed	4/6/2020	Linda Vista Drive - Mainline Break.		\$ 5,563.00	\$ 5,562.50	
	CIP	2020-09	Closed	4/6/2020	Gird Road - Winery easement analysis and exhibit.		\$ 7,680.00	\$ 6,900.00	
	CIP	2020-10	Closed	9/1/2020	Additional Gird Road - Winery easement analysis and new exhibit.		\$ 5,320.00	\$ 5,320.00	
	CIP	2020-11	Closed	11/6/2020	Easement for Hialeah PRS - Via De La Reina.		\$ 3,990.00	\$ 2,545.00	
	NON-CIP	2020-12	Closed	12/3/2020	Stake easement - Winterhaven Court		\$ 4,490.00	\$ 3,527.50	
	NON-CIP	2020-13	Closed	12/16/2020	Legal and Plat for Gird Road - Winery.		\$ 5,460.00	\$ 5,460.00	
CIP	2021-14	Open	1/29/2021	Survey & staking of easements - Rancho Amigos. Auth \$815 over. (Staff evaluating if more work may be needed.)		\$ 7,530.00	\$ 8,345.00		
CIP	2021-15	Open	5/27/2021	Survey & staking of easement - Turner Pump Station. (Staff evaluating if more work may be needed.)		\$ 5,665.00	\$ 5,665.00		
NON-CIP	2021-16	Open	7/22/2021	Prepare documentation to file a quit claim for Rainbow easement at Fire Station 4.		\$ 1,500.00	\$ -		
						\$ 150,000.00	\$ 81,873.00	\$ 71,823.75	\$ 78,176.25
Title: As-Needed Land Surveying Services Firm: Right-of-Way Eng. Expires: 8/29/2022* (C#18-15) *One year extension.	NON-CIP	2019-00A	Closed	5/15/2019	Title Reports, Legals & Plats - Los Sicomoros.		\$ 7,705.00	\$ 7,705.00	
	NON-CIP	2019-00B	Closed	6/18/2019	Adams Property Easement - Ranger Road.		\$ 1,885.00	\$ 1,885.00	
	CIP	2019-00C	Closed	6/30/2019	Pardee Easement - North River.		\$ 2,875.00	\$ 2,875.00	
	NON-CIP	2019-01	Closed	6/19/2019	Easement Survey - Grove View Road.		\$ 4,220.00	\$ 3,285.00	
	CIP	2019-02	Closed	10/3/2019	Easement Survey - Pala Mesa/Tealote/Fire Rd/Pala Lake.		\$ 15,640.00	\$ 15,451.30	
	CIP	2019-03	Closed	11/6/2019	Easement Survey - Moosa Creek Pump Station. Restake and reconfigure easement authorized additional \$525.		\$ 5,675.20	\$ 5,675.20	
CIP	2020-04	Closed	2/19/2020	Lemonwood Easement Location.		\$ 5,370.00	\$ 4,390.00		
CIP	2020-05	Closed	6/9/2020	Easement Survey - Hutton Pump Station.		\$ 5,687.50	\$ 4,577.50		

AS-NEEDED CONTRACT EXPENDITURES REPORT

JULY 2021

CONTRACT INFO	FUND SOURCE	ASSIGN. NO.	STATUS	DATED	DESCRIPTION	AUTHORIZED AMOUNT	NOT TO EXCEED AMOUNT	INVOICED TO DATE	CURRENT BALANCE
	CIP	2020-06	Closed	7/30/2020	Easement Survey - Rainbow Heights Rd - Calfire Camp Site .		\$ 5,756.00	\$ 4,177.60	
	CIP	2020-07	Open	8/26/2020	Easement Survey - RHR - Calfire Camp Site Additional Services.		\$ 2,276.00	\$ -	
	CIP	2020-08	Closed	10/19/2020	Easement Survey - OHE Rancho Del Caballo.		\$ 1,620.00	\$ 1,445.00	
	CIP	2020-09	Closed	11/3/2020	Easement Survey - Rainbow Heights Rd. Westside - Calfire Camp Site.		\$ 11,521.00	\$ 8,449.20	
	CIP	2021-10	Closed	1/11/2021	Topographic Survey - Rainbow Heights Road		\$ 8,820.00	\$ 8,525.00	
	CIP	2021-11	Open	1/19/2021	Easement Survey - Skycrest Drive.		\$ 7,710.00	\$ 4,162.60	
	CIP	2021-12	Open	2/4/2021	Easement Survey, Legal Desc./Plat Map - Camino Del Cielo. (Staff evaluating if more work may be needed.)		\$ 5,490.00	\$ 5,467.50	
	CIP	2021-13	Open	2/23/2021	Easement Survey/County ROW Marking, Topo Map - Camino Del Cielo. (Staff evaluating if more work may be needed.)		\$ 2,320.00	\$ 2,320.00	
	CIP	2021-14	Open	2/23/2021	Easement Survey - Skycrest Drive.		\$ 4,720.00	\$ 795.00	
					CO-01 for \$50K BoD 5/26/20, CO-02 for \$50K BoD 6/22/21.	\$ 150,000.00	\$ 99,290.70	\$ 81,185.90	\$ 68,814.10
Title: As-Needed Civil Engineering Services	Both	2019-01	Closed	12/18/2019	PRS and other Schematic Design/Drafting Services.		\$ 10,000.00	\$ 7,527.50	
Firm: Dudek Expires: 6/25/2022 (C# 19-16)	CIP	2020-02	Closed	8/5/2020	Design of Hutton Pump Station Site - Assignment Cancelled.		\$ 1,787.50	\$ 1,787.50	
					CO-01 for (\$100K) BoD 6/22/21.	\$ 50,000.00	\$ 11,787.50	\$ 9,315.00	\$ 40,685.00
Title: As-Needed Civil Engineering Services	NON-CIP	2019-01	Closed	7/16/2019	PS&E Pavement Repair - Dentro De Lomas.		\$ 8,890.00	\$ 8,890.00	
Firm: Omnis Consulting, Inc. Expires: 7/01/2022 (C#19-17)	CIP	2019-02	Closed	8/1/2019	Olive Hill Estates Transmission Water Main.		\$ 73,700.00	\$ 73,700.00	
	CIP	2019-03	Closed	10/14/2019	Vista Valley Retaining Wall Design.		\$ 23,495.00	\$ 23,040.67	
	CIP	2019-04	Closed	12/3/2019	Sarah Ann to Gird Road Force Main Replacement.		\$ 22,790.00	\$ 22,790.00	
	CIP	2020-05	Closed	3/24/2020	Gird Road Water Main Upsize.		\$ 21,120.00	\$ 21,120.00	
	CIP	2020-06	Closed	8/5/2020	Caltrans Encroachment Permit Renewal.		\$ 6,410.00	\$ 3,670.00	
	NON-CIP	2020-07	Open	10/14/2020	Standard Drawing - CAD Updates.		\$ 4,400.00	\$ 2,200.00	
	NON-CIP	2020-08	Closed	10/29/2020	PEIR Pipe Alignment Analysis.		\$ 19,920.00	\$ 19,920.00	
	CIP	2021-09	Open	4/19/2021	Sarah Ann Waterline Replacement.		\$ 6,800.00	\$ 5,265.00	
	CIP	2021-10	Open	4/19/2021	Rainbow Water Quality Improvement Relocation Design.		\$ 13,900.00	\$ 8,560.00	
	CIP	2021-11	Open	6/9/2021	Wilt Road Water Pipeline Design.		\$ 45,905.00	\$ -	
					CO-01 for \$150K BoD 6/23/20.	\$ 300,000.00	\$ 247,330.00	\$ 189,155.67	\$ 110,844.33
Title: As-Needed Civil Engineering Services	CIP	2019-01	Open	12/18/2019	Live Oak Park Road Bridge Crossing.		\$ 42,020.00	\$ 30,685.00	
Firm: HydroScience Eng., Inc. Expires: 6/25/2022 (C#19-18)									
					CO-01 for (\$40K) BoD 6/22/21.	\$ 110,000.00	\$ 42,020.00	\$ 30,685.00	\$ 79,315.00

AS-NEEDED CONTRACT EXPENDITURES REPORT

JULY 2021

CONTRACT INFO	FUND SOURCE	ASSIGN. NO.	STATUS	DATED	DESCRIPTION	AUTHORIZED AMOUNT	NOT TO EXCEED AMOUNT	INVOICED TO DATE	CURRENT BALANCE
Title: As-Needed Real Estate Appraisal Services Firm: Anderson & Brabant, Inc. Expires: 6/25/2022 (C# 19-19)	CIP	2019-01	Closed	9/19/2019	North River Rd Easement Appraisal.		\$ 3,500.00	\$ 3,500.00	
	CIP	2020-02	Closed	2/19/2020	PRS Fire Road Appraisal.		\$ 7,500.00	\$ 7,500.00	
	CIP	2021-03	Open	4/28/2021	Hutton Pump Station Site Appraisal. (Staff evaluating if more work may be needed.)		\$ 4,000.00	\$ 4,000.00	
					CO-01 for \$20K BoD 6/22/21.	\$ 40,000.00	\$ 15,000.00	\$ 15,000.00	\$ 25,000.00
Title: As-Needed Real Estate Appraisal Services Firm: ARENS Group, Inc. Expires: 6/11/22 (C# 19-20)	NON-CIP	2019-01	Closed	7/15/2019	Bonsall Reservoir Appraisal (to include rent value).		\$ 3,050.00	\$ 3,050.00	
	CIP	2020-02	Closed	1/7/2020	Moosa Creek Pump Station Easement Appraisal.		\$ 5,350.00	\$ 6,542.50	
	CIP	2020-03	Closed	1/7/2020	Hutton Pump Station Easement Appraisal.		\$ 3,400.00	\$ 3,400.00	
					CO-01 for \$20K BoD 6/22/21.	\$ 40,000.00	\$ 11,800.00	\$ 12,992.50	\$ 27,007.50
Title: As-Needed Geotechnical Services Firm: Leighton Consulting, Inc. Expires: 11/13/2022 (C# 19-39)	CIP	2020-01	Closed	6/25/2020	Rainbow Heights Pump Station geotechnical exploration.		\$ 8,630.00	\$ 8,484.20	
	CIP	2021-02	Open	4/15/2021	Turner Pump Station geotechnical exploration.		\$ 14,300.00	\$ 6,350.38	
	CIP	2021-03	Open	5/15/2021	Hutton Pump Station geotechnical exploration.		\$ 8,450.00	\$ -	
						\$ 100,000.00	\$ 31,380.00	\$ 14,834.58	\$ 85,165.42
Title: As-Needed Geotechnical Services Firm: Ninyo & Moore G.E.S. Expires: 11/1/2022 (C# 19-40)	NON-CIP	2020-01	Closed	3/26/2020	Dentro De Lomas - Geotech observation & material testing. Proj. #2		\$ 6,518.00	\$ 1,369.00	
		2020-02	Closed	8/6/2020	Vista Valley Villas PRS geotech observation & material testing.		\$ 10,235.00	\$ 7,136.00	
		2021-03	Open	5/6/2021	Dentro De Lomas - Geotech observation & material testing. Proj. #1		\$ 6,097.00	\$ -	
						\$ 100,000.00	\$ 22,850.00	\$ 8,505.00	\$ 91,495.00
Title: As-Needed Geotechnical Services Firm: ATLAS (SCST, LLC) Expires: 11/20/2022 (C# 19-41)	CIP	2020-01	Closed	7/7/2020	Olive Hills Estates Trans. Main geotech observation/field test.		\$ 36,619.00	\$ 17,563.00	
							\$ 100,000.00	\$ 36,619.00	\$ 17,563.00
Title: As-Needed Construction Management & Insp. Services Firm: Harris & Associates Expires: 1/28/2023 (C# 20-01)	CIP	2020-01	Closed	3/13/2020	CM Support Services for the WSUP.		\$ 100,000.00	\$ 99,972.50	
	CIP	2020-02	Closed	4/7/2020	Constructability design review of PUP-1.		\$ 6,270.00	\$ 5,280.00	
	NON-CIP	2020-03	Open	4/21/2020	Sewer North River Road - Emergency Repair.		\$ 11,000.00	\$ 4,389.33	
	CIP	2020-04	Open	9/21/2020	District Wide Inspection Services.		\$ 20,000.00	\$ 9,751.73	
					CO-01 for \$20K BoD 6/22/21.	\$ 170,000.00	\$ 137,270.00	\$ 119,393.56	\$ 50,606.44
Title: As-Needed Construction Management & Insp. Services Firm: Reilly Construction Mmnt. Expires: 1/28/23 (C# 20-02)							\$ -	\$ -	
							\$ -	\$ -	
					CO-01 for (\$100K) BoD 6/22/21.	\$ 50,000.00	\$ -	\$ -	\$ 50,000.00

AS-NEEDED CONTRACT EXPENDITURES REPORT

JULY 2021

CONTRACT INFO	FUND SOURCE	ASSIGN. NO.	STATUS	DATED	DESCRIPTION	AUTHORIZED AMOUNT	NOT TO EXCEED AMOUNT	INVOICED TO DATE	CURRENT BALANCE
Title: As-Needed Environmental Services Firm: Helix Environmental Expires: 2/25/2023 (C# 20-03)	CIP	2020-01	Closed	5/13/2020	Pipeline Upgrade Project - Disney Lane - Cultural/ Biological Evals.		\$ 9,148.00	\$ 5,804.56	
	CIP	2020-02	Closed	5/13/2020	Pipeline Upgrade Project - Via Vera - Cultural/Biological Evals.		\$ 9,155.00	\$ 4,446.37	
	CIP	2020-03	Closed	5/14/2020	Pipeline Upgrade Project - Hutton Pump Station - Cultural/Biological Evals.		\$ 13,209.00	\$ 6,793.54	
	CIP	2020-04	Closed	5/14/2020	Pipeline Upgrade Project - Turner Pump Station - Cultural/Biological Evals.		\$ 13,209.00	\$ 7,683.26	
	CIP	2020-05	Closed	7/16/2020	North River Road Sewer Points Repair - Biological Survey.		\$ 3,900.00	\$ 3,136.05	
	CIP	2020-06	Closed	9/10/2020	Gopher Canyon Water Pipeline Impv. Project - CEQA ISMND.		\$ 34,695.00	\$ 31,363.46	
	CIP	2021-07	Closed	3/25/2021	Rainbow Heights Pipe Installation - Bird Survey.		\$ 5,000.00	\$ 808.80	
	CIP	2021-08	Open	5/21/2021	RMWD HQ - Biological Survey & Buffer Mapping.		\$ 11,684.00	\$ -	
					CO-01 for \$110K BoD 6/22/21.	\$ 210,000.00	\$ 100,000.00	\$ 60,036.04	\$ 149,963.96
Title: As-Needed Environmental Services Firm: Rincon Consultants Expires: 2/25/2023 (C# 20-04)	CIP	20-01	Closed	11/6/2020	Rainbow Heights Road Transmission Main Biological Survey.		\$ 3,240.00	\$ 3,234.75	
					CO-01 for (\$15K) BoD 6/22/21.	\$ 85,000.00	\$ 3,240.00	\$ 3,234.75	\$ 81,765.25
Title: As-Needed Environmental Services Firm: Michael Baker International Expires: 3/24/2023 (C# 20-05)							\$ -	\$ -	
					CO-01 for (\$15K) BoD 6/22/21.	\$ 85,000.00	\$ -	\$ -	\$ 85,000.00
						Total Authorized	Total Encumbrance	Total Expended	
						\$ 1,790,000	\$ 867,347	\$ 644,542	