

**Request for Qualifications for Release January 4 , 2013**

## **Central Valley Salinity Coalition with CV-SALTS Initiative**

**Request for Qualifications (RFQ) 2012-00?**

**For Consulting Services to Provide  
Technical Project Services Supporting CV-SALTS and  
the Lower San Joaquin River Committee**

### **1. INTRODUCTION**

#### **Organization Background**

The Central Valley Salinity Coalition (CVSC) was formed in 2008 to integrate and augment the efforts of the Central Valley Salinity Alternatives for Long Term Sustainability (CV-SALTS) Initiative. The purpose of the organization is the governance and organization of the efforts needed to plan, develop and implement the Salinity and Nitrate Management Plan (SNMP) for the Central Valley. The SNMP will include development of water quality objectives for salinity on the Lower San Joaquin River (LSJR) from the Merced River inflow to Vernalis, a river reach known to be impaired due to rising salinity levels. This effort will define beneficial uses of the LSJR, propose water quality objectives for salinity and develop implementation mechanisms that ensure protection of beneficial uses and provide the basis for a basin plan amendment to support its application.

#### **Project Background**

CV-SALTS is a stakeholder driven effort intended to provide long-term economic and environmental sustainability throughout the Central Valley while simultaneously satisfying the requirements of the State's Recycled Water Policy. In February 2012, the CV-SALTS Executive Committee approved a 5-year work plan and strategy framework for the CV-SALTS program which can be viewed at: [http://cvsalinity.org/index.php/agendas/doc\\_download/918-cv-salts-program-work-plan-v-8-approved-3912](http://cvsalinity.org/index.php/agendas/doc_download/918-cv-salts-program-work-plan-v-8-approved-3912) . Development of salinity water quality objectives in the LSJR was identified as one of the priority items to be completed by the end of 2014.

The Executive Committee recognized the importance of salinity control on the LSJR as the Basin Plan recognizes that the LSJR is the only outlet for salt from the San Joaquin River Basin. Allowing the LSJR to be used for salt control must be done in a manner that protects not only in-stream beneficial uses but also provides protection to downstream uses. In order to assess salinity control needs in the basin, CV-SALTS will be looking for a consultant to finalize reviews of the beneficial uses in the LSJR and range of water quality objectives protective of those uses, evaluate the alternatives available to meet those objectives and prepare the necessary documentation to support a basin plan amendment to establish those objectives.

The LSJR Committee has prepared a work plan for developing the water quality objectives in the LSJR. The RFQ will seek an entity (hereinafter referred to as Consultant) that will be responsible for assisting the LSJR Committee in defining the technical work needed to form the scientific basis of the basin plan amendment, and in developing, overseeing, managing and completing a variety of complex technical and quasi-regulatory projects needed to complete the basin plan amendment process. Consultant, as used in this document can mean a consultant team or a team of consultants.

The Consultant will need to develop the overall scope of work for the various tasks, but also must ensure that the tasks are completed as scoped, on time, and on budget, and are fully integrated and coordinated in order to support basin plan amendment process.

Consultants proposing under this RFQs must show through documentation of an in-depth understanding of the basin planning process. In addition, they must demonstrate the ability to provide:

- a.) Guidance to the LSJR Committee on development of a basin plan amendment for salinity in the Lower San Joaquin River Basin;
- c.) Scientifically defensible technical services needed to support development of the basin plan amendment; and
- d.) Required environmental and administrative documentation to support a basin plan amendment.

Consultants also must demonstrate experience preparing use attainability assessments, site-specific objectives, variances and/or actual adopted Basin Plan Amendments that have been developed in a collaborative setting. The Consultants are expected to provide examples of projects related to tasks identified in the scope of work. Examples should include estimated and final costs and timelines to complete the described project.

The selected Consultant will receive oversight from the Lower San Joaquin River Committee, the LSJR Committee Manager and periodically from the CV-SALTS Technical and Executive Committees. The consultant will also be expected to participate with the LSJR Committee in development of final work plans and task orders that identify the critical technical studies needed to ensure successful completion of the proposed basin plan amendment.

The Lower San Joaquin River Committee and the Executive Committee of CV-SALTS have secured approximately \$650,000 for completion of the present work plan and proposed basin plan amendment. The Draft Final salinity and boron basin plan amendment must be completed by May 2014.

## **2. ESRCD Contract, CVSC and CV-SALTS Coordination**

The funding for the project may come from one or more sources including the State Water Resources Control Board (SWRCB) under contract with the East Stanislaus Resource Conservation District (ESRCD), from the CVSC, or potentially other sources. The LSJR Basin Plan Amendment contract will be executed between the ESRCD and the Consultant for the scope of work shown below, but may include funding for task orders to be approved in the future by the LSJR Committee and/or the CV-SALTS Executive Committee. Approximately \$650,000 is currently available under the contract with the ESRCD for successful completion of a basin plan amendment for salinity and boron water quality objectives in the

Lower San Joaquin River. Additional funding may be made available for other tasks as may be directed by the LSJR Committee and/or the CV-SALTS Executive Committee.

Budgets for individual tasks may be adjusted and/or augmented upon approval by the LSJR Committee and/or the CV-SALTS Executive Committee. Other funding is available to the Executive Committee and they may direct the award of additional funds through other contracting mechanisms as they determine best, but it is currently anticipated that funding for the project will be primarily from a State Water Resources Control Board Cleanup and Abatement Fund Contract.

## **2.1 Request for Qualifications**

This request is for a Statement of Qualifications (SOQ) for providers of professional services to accomplish the scope of work shown in Attachment A. Responding entities shall provide qualifications for all areas within the scope. The Consultant will provide a SOQ documenting their project approach, hourly rates for all staff listed in the qualifications document and needed to perform the scope of work, any other rates or charges for the staff, any travel costs for staff and any other charges including markup on subcontracting or any standard charges. Charges or fees not included in the SOQ will not be allowable costs under the contract.

The Consultant should address how they would manage Task Orders under their contract. They should address how they would determine and recommend work scope tasks be done by the Consultant's staff or team, or by a third party. The Consultant should explain how they would manage the work of outside parties, subcontractors, other Consultants and volunteers or in-kind work provided.

## **2.2 LSJR Committee Work, Schedule and Budget**

The Consultant's SOQ should focus on qualifications for development of final work plans and task orders that identify the critical technical studies needed to ensure successful completion of the basin plan amendment. In addition, the Consultant's SOQ should describe their approach to management of the project and how they will go about successful completion of the critical technical studies needed. The consultant should propose a budget, work breakdown structure and schedule based on a project completion date of July 2014.

Cost assumptions for the Consultant's proposal should be well documented and organized to allow the LSJR Committee and/or the Executive Committee to increase or decrease efforts based on available funding, duration or workload. The Consultant should list all materials, equipment, labor, planning and coordination to provide the services listed in Attachment A.

The Consultant shall commit to providing a project manager for the duration of the program. Should the project manager become unavailable, the contract may be terminated. Should the Executive Committee elect not to terminate, the Consultant shall bear all costs related in any way to changes in staffing.

## **3. Scope of Work**

**The scope of work is shown in Attachment A.**

## 4. Instructions

Responses to this RFQ must be made according to the requirements set forth herein and in the Scope of Work. Failure to adhere to these requirements or to include conditions, limitations, or misrepresentations may be cause for rejection of the submission. Any correction and resubmission by the proposer will not extend the time for evaluation of the submission. SOQ documents will be reviewed by a group composed of members of CV-SALTS Lower San Joaquin River Committee and Executive Committee.

Submit one electronic file and six (6) complete copies of the submission and related information to:

East Stanislaus Resource Conservation District  
c/o Andrea Bowling  
USDA NRCS Modesto Service Center  
3800 Cornucopia Way  
Modesto, CA 93232-9494  
[eaststanislausrcd@gmail.com](mailto:eaststanislausrcd@gmail.com)

All submissions must be received by December 17, 2012 – 4:00 pm.

### 4.1 Required Information

All submissions must include the following information:

1. Cover letter, including name, telephone number, and address of the firm;
2. Table of contents;
3. Description of the firm's business; *i.e.*, individual, partnership, joint venture, etc.;
4. Background information about the proposer, including technical qualifications and licenses;
5. Description of the firm's experience, including the scope of similar projects, timeline to complete project and total cost;
6. Organizational chart showing proposed management and project team;
7. Complete list of personnel, their qualifications for conducting basin planning work in California, this should also include any subcontractors that will be dedicated to this project;
8. Assigned personnel background, experience, and job title/classification;
9. Proposed scope of work for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River;
10. Detailed project schedule for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River;
11. Detailed Fee proposal which shall include breakdown of labor hours by employee billing classification, expense reimbursement schedule that includes cost of non-labor and subcontractor services for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River;
12. Hourly billing rates for personnel to be assigned to the project; and
13. Any exceptions to the Standard Services Agreement (Attachment C), exceptions will be considered in award qualifications.

## 5. Evaluation Criteria

### **Evaluation of Technical Qualifications will be conducted on the following:**

1. Responsiveness to RFQ and SOQ organization and clarity;
2. Experience and qualifications of the Consultant and subcontractor firms in salinity and basin planning in relation to regulatory issues;
3. Experience and qualifications of the Technical staff and assigned individuals in salinity and basin planning issues in California;
4. Project approach and understanding;
5. Contractor ability to complete work products on the approved schedule;
6. Demonstrated ability to act independently and perform unbiased evaluations;
7. Experience and qualifications of the firm in:
  - a. Project management in a stakeholder driven regulatory environment;
  - b. Surface water modeling and groundwater accretions;
  - c. Salt loading and salinity issues;
  - d. Simplifying complex information into simplified concepts for presentation;
  - e. Salts management issues in a surface water environment;
  - f. Basin planning and successful Basin Plan Amendment completion;
  - g. Technical skills and experience in completion of studies supporting Basin Planning; and
  - h. Regional planning experience and understanding of Central Valley agricultural and salt management issues.
8. Project management qualifications of the firm and staff:
  - a. Demonstrated management experience in stakeholder programs;
  - b. Track record of completion of complex tasks on schedule;
  - c. Scope, cost and schedule development and review;
  - d. Clarity of the task order process including authorization and completion; and
  - e. Coordination, reporting and responsiveness in a stakeholder environment.
9. Firm's knowledge of State and Federal statutes covering basin planning procedures and basin plan amendments.

### **Evaluation of Cost will be on the basis of the following:**

10. Clarity and completeness of the breakdown of costs and explanation for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River;
11. Appropriateness of proposed fee structure and anticipated value and quality of services received for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River;
12. Total cost compared to the value of products and services; and
13. Demonstrated ability to complete project within budget.

The selection process is anticipated to include an evaluation of the qualifications and cost proposal for completion of a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River and may include an interview with top ranked firms.

## **6. General Requirements**

All proposers are hereby advised that this RFQ is an informal solicitation and is not a commitment or offer to enter into an agreement or engage into any competitive bidding or negotiation pursuant to any statute, ordinance, rule, or regulation. CVSC, ESRCD and the Water Boards reserve the right to negotiate with any qualified source. CVSC, the ESRCD, and the Water Boards reserve the right to reject any or all submissions for any reason or for no reason at all.

CVSC, ESRCD and the Water Boards reserve the right to request further information from the proposer, either in writing or orally. Such request will be addressed to that person or persons authorized by the proposer to represent the proposer. CVSC, ESRCD and the Water Boards reserve the sole right to judge the proposer's representations, either written or oral. The LSJR and Executive Committee of CV-SALTS will make the final selection decision for the award contracts.

Proposers understand and agree that submission of the SOQ constitutes acknowledgement and acceptance of, and a willingness to comply with, all terms, conditions, and criteria contained in this RFQ. False, incomplete, or unresponsive statements in connection with a submission may be sufficient cause for the rejection of the submission. The valuation and determination of the fulfillment of the above requirement will be CVSC, ESRCD, and THE Water Boards responsibility and their decision shall be final.

The CVSC, ESRCD and THE Water Boards reserve the right to interpret or change any provisions of this RFP/RFQ at any time prior to the submission date. Such interpretations or changes will be in the form of addenda to this RFQ. Such addenda will become part of this RFQ and may become part of any resultant contract.

Such addenda will be made available to each person or organization that is known to have received this RFQ. Should such addenda require additional information not previously requested, a firm's failure to address the requirements of such addenda might result in the submission being disqualified or ranked lower in reviews. All SOQs submitted in response to this RFP will become the exclusive property of the CVSC, ESRCD and the Water Boards and will be made available to CV-SALTS stakeholders.

This project is intended to be funded from Cleanup and Abatement (CAA) funds awarded by the State Water Resource Control Board. The terms and condition of those funds and the requirements of that contract will apply to the contractor. The ESRCD or other CV-SALTS entities may at their discretion fund this project from proceeds of State, Federal or other grants or agreements and Consultant contract may be managed by the agency providing funding with different or additional requirements which must be complied with. These issues will be resolved at the time of contracting with the selected contractor.

The ESRCD and the Water Boards shall not in any way be liable for any costs incurred in connection with the preparation of any submission submitted in response to this RFQ.

The Consultant shall execute a Standard Agreement for services with the selected agency. The East Stanislaus Resource Conservation District terms are shown in Appendix C, Submission of an SOQ is deemed accepting terms and conditions without exception unless noted in the submission.

## **7. Schedule of Submission Events**

The following table contains the expected schedule of events for the RFQ process. ESRCD and the CVSC retain the right to modify this schedule as needed to support unexpected circumstances.

<b>Activity</b>	<b>Dates</b>
RFQ Distributed/posted to website	November 12, 2012
Submission Due	January 4, 2013 – 4:00 pm
LSJR Committee Recommendation of Award	January 31, 2013
CV-SALTS Executive Committee Approval	February 7, 2013
ESRCD Approval	February 28, 2013
Execution of Agreement with Contractor	March 13, 2013

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## 8. SOQ Authorization

(Please provide this document on your letterhead)

I certify I am authorized to submit this SOQ on behalf of my company, \_\_\_\_\_(company name), and this submission conforms to required specifications unless otherwise noted.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Submission Submitted by

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Email

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Facsimile Number

# ATTACHMENT A

## Scope of Work for Salinity and Boron Water Quality Objectives in the Lower San Joaquin River

The following work elements are intended to be contracted as a part of this RFQ or procured through other mechanisms:

- 1. Finalize Beneficial Uses Review**  
Complete the review of current and potential beneficial uses of the Lower San Joaquin River from the Merced River inflow to Vernalis; describe and document those uses; and prepare draft Basin Plan language for any proposed changes in designated beneficial uses ;
- 2. Finalize Water Quality Criteria Review**  
Complete the review and delineation of water quality criteria for salinity and ions making up salinity to protect the designated beneficial uses of wetlands, and aquatic life;
- 3. Finalize Draft EC Objectives Report**  
Respond to public comments and complete the Regional Board draft staff report entitled "Salt Tolerance of Crops in the Lower San Joaquin River Basin";
- 4. Identify Ranges of Water Quality Objectives**  
Evaluate the range of water quality objectives identified for protection of the proposed beneficial uses and finalize a set of water quality objectives for further analysis.
- 5. Compile and Update Water Quality Data (DWR?)**  
Identify, gather, and compile current data (1997 to the present) for flow, salinity (EC and TDS) and ions that make up salinity (sodium, magnesium, chloride, sulfate, and boron) for the major and minor subareas of the Lower San Joaquin River (LSJR) basin. In addition, develop a detailed description of current salinity conditions in the LSJR seasonally, monthly and under different water year types.
- 6. Update Baseline Salt Loading to the LSJR**  
Identify salt sources (subareas and source categories) in the LSJR basin, quantify salt loading from the various subareas and source categories, and describe the timing of salt loading to the river. Mass emissions from the LSJR should also be quantified. This task should include development of a water balance and salt budget useful for further water quality modeling;
- 7. Model Existing Water Quality**  
Conduct monthly, seasonal and water-year analysis of existing conditions and evaluate the rate of compliance with proposed water quality objectives under current conditions;
- 8. Conduct Implementation Planning**
  - a. Identify and develop several implementation scenarios (alternatives) for further evaluation;
  - b. Develop methods and criteria for screening those alternatives;

- c. Participate in the process of selecting the alternatives for detailed analysis;
- d. Conduct detailed analyses of selected alternatives, including water quality modeling for compliance;
- e. Propose alternative(s) for implementation;
- f. Develop and define a program of implementation;

**9. Economic Analysis**

Conduct a full economic analysis showing the costs of implementation of the selected alternatives for various discharge sectors. This should include the costs of alternative water quality objectives that may provide a higher level of protection;

**10. Long-term Monitoring Program**

Develop goals for a long-term monitoring and reporting program and prepare a program to evaluate compliance with water quality objectives and the effectiveness of the implementation program;

**11. Substitute Environmental Documentation**

Prepare the Substitute Environmental Documentation (SED) to serve as the CEQA functional equivalent documentation, that includes the Regional Board staff report containing an environmental analysis of the project, a completed Environmental Checklist, and other associated documentation and administrative records for support of the proposed basin plan amendment,.

The Consultant and project management staff must have a strong understanding of the administrative, scientific and technical documentation required to support new regulatory requirements, as demonstrated by a history of actual adopted basin plan amendments, use attainability assessments, site-specific objectives, and/or variances developed in a collaborative setting.

The consultant will provide planning and technical oversight and expertise, coordination and assistance to develop and implement a scope of work for completion of the needed studies and regulatory documents. The consultant will be expected to prepare detailed work plans to conduct the technical and administrative work needed to complete a basin plan amendment for salinity and boron water quality objectives in the Lower San Joaquin River. The consultant must also manage and/or complete the work described in the approved workplans with the general direction of the LSJR Committee and the Executive Committee of CV-SALTS.

## **ATTACHMENT B**

### **Explanation of CV-SALTS Program and Roles of Various Groups**

The earlier sections detail the activities and role of the consultant firm. This section briefly describes the role of the other groups or functions within CV-SALTS. An organization chart is shown following the descriptions.

**Executive Committee of CV-SALTS** – is the programmatic Management Committee of the CV-SALTS initiative. They provide oversight of all committees and consultant work products to ensure review and policy acceptance. The Executive Committee has final authority in approval of scope, services and acceptance of products. The Committee directs the Program Manager and Policy Facilitator.

**Program Manager** – Provides overall program management and prime contract for administration, coordination and facilitation. Under the direction of the Executive Committee provides coordination, program definition and integration of policy, outreach and technical activities.

**LSJR Committee Manager** – Provides overall management and prime contract for administration, coordination and facilitation of activities undertaken by the Lower San Joaquin River Committee. Under the direction of the LSJR Committee provides coordination, program definition and integration of policy, outreach and technical activities.

**Policy Facilitator** – Working under the Program Management contract develops and facilitates agreement on the policy issues and requirements to be developed for the basin plan.

**Technical and Economic Committees** – Committee under the direction of the Executive Committee plans and manages technical studies and provides direction and reviews technical work making recommendations to the Executive Committee, including the Management Practice Subcommittee, Knowledge Gained Subcommittee and others named by the Technical and Economic Committees.

**Central Valley Salinity Coalition** – The Coalition is the organizing entity for the Stakeholders to provide funding and coordinate stakeholder issues for CV-SALTS. Many Coalition Board Members are members of the Executive Committee.

**Regional Water Board** – The Regional Water Board composed of appointed members who participate in meetings but have a primary responsibility for consideration and approval of the basin plan amendments when proposed. The Regional Board is a member of the MOA for CV-SALTS.

**Regional Water Board Staff** – Under direction of the Regional Board, participate as active stakeholders and provide oversight and feedback on efforts developed and coordination with other state agencies. The Regional Board is a member of the Executive Committee.

**State Water Board** – The Board is a member of the MOA for CV-SALTS and is a primary source of funding for the CV-SALTS efforts. Their primary responsibility will be for consideration and approval of the final basin plan when approved by the Regional Water Board.

**State Board Staff** – Participate as representative members of the MOA members to assist in coordination of State Board issues and as a participant and member of the Executive Committee.

**US EPA** – The US EPA should be represented as a participant in CV-SALTS and would have the role of coordination with their internal programs and with other federal agencies. Their primary responsibility will be for consideration and approval of the final basin plan amendment following approval by the State Water Board and Office of Administrative Law.

**ESRCD** – The East Stanislaus Resource Conservation District is a stakeholder in the Lower San Joaquin River Committee of CV-SALTS and has also volunteered to act as contracting agent for State Board Cleanup and Abatement Funding for CV-SALTS.