

# POLICY MANUAL


Date Adopted: December 8, 1986

Date Last Amended: 4/12/94; 11/8/94; 01/08/98

Classification: GENERAL ADMINISTRATION

Subject: Request for Proposals

Approved By:



## I. General Statement

The District shall utilize a formal Request For Proposal (RFP) process in securing services, from external suppliers, for which competitive bidding is inappropriate or unlawful.

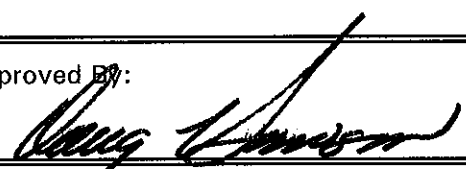
## II. RFP Notice

The staff shall prepare and appropriately distribute, through direct mail, public advertising, and other appropriate means, a formal written RFP Notice. The notice shall include the title of the RFP, general description of work or services requested, where RFP is available and date RFP response must be received by the District.

## III. Contents of RFP

The written RFP shall include, at a minimum, request for the following information:

- Organizational Information
- Experience
- Scope of Proposed Services
- Project Budget and Fee Schedule
- Subcontractors

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- Potential for Conflict of Interest
- Reference List
- A copy of the most recent Financial Statement
- Additional information specific to the services requested shall be included
- Proof of required Insurance

IV. Pre-Proposal Information Conference

At the sole discretion of the District a Pre-Proposal Information Conference may be conducted. The District will determine if attendance at the conference is optional or mandatory. Failure to participate in a mandatory conference will disqualify a potential respondent from consideration in the RFP process. Each Conference will be recorded and the tape retained by the District.

V. Post-Information Conference Inquires

All Post-Information Conference Inquiries from potential respondents shall be submitted to staff in writing. Staff's response shall also be in writing and will be transmitted along with the inquiry to the respondents who participated in the

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Information Conference. An authorized District contact person will be designated for each RFP.

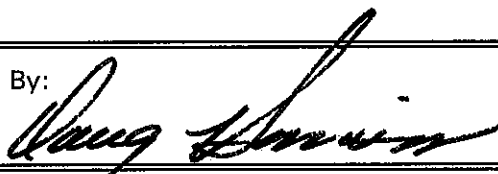
VI. Trade Secret Acknowledgement

All respondents will be required to sign a Trade Secret Acknowledgement.

VII. Selection Process

A. Staff Review of Written Materials: Staff shall review the written proposals and materials received in response to the RFP. Such review may include experts or interested parties from outside the staff.

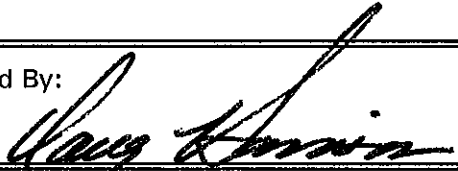
B. Staff Interviews: Staff shall conduct interviews of those submitting the proposals most highly ranked in the review of the written materials. Staff shall, whenever appropriate, include experts or interested parties from outside the staff in the interview panel.

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C. Site Visits: At the discretion of the District, a site visit to a representative project or respondents place of business may be made.

D. Staff Recommendation: Staff shall submit to the Board of Directors a report identifying the top three proposals ranked in order first, second, and third. The report shall include staff's recommendation, staff's reasoning, the form of the RFP and a summarized description of the process. Written materials submitted by respondents to the District's RFP shall be made available to Board Members upon request. These materials will not be included in the regular Board packet but will be available prior to and at the Board Meeting for review and reference.

E. Board of Directors' Interviews: Representatives of the top three proposals shall be invited to attend the meeting of the Board of Directors at which the staff report is submitted. The invited representatives may make brief summary presentations, the length of the presentation to be determined by the Board of Directors.

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F. Preference to Local Firms: Preference may be given to a local firm for consulting and professional services, when all other elements of qualification and capability are determined to be equal among the finalist firms being considered. A local firm is defined as one with a fixed primary branch office within the District boundary, and a majority of the work on the proposed project will be performed by employees who are permanently assigned to that office.

VIII. Board of Directors Approval

The Board of Directors shall make the final selection of the service provider from among the top three proposals.

### RFP Evaluation Guideline

The following factors shall be considered and evaluated in selecting a professional consultant for a particular study or project:

1. Education/technical background of the consultant;
2. Experience record of the consultant;
3. Demonstrated record of success by the consultant, on work previously performed for the District or similar work performed for others;
4. Individuals within the consultant's organization who will have direct charge of work;
5. Whether consultant has adequate staff to perform the work within the time allowance;
6. The ability of the consultant to make effective public presentations of the report and/or design as may be required;
7. The ability of the consultant to work effectively with District staff, other public agencies, and related parties as may be required during the course of the project;
8. Where appropriate, whether the consultant has adequate knowledge of local conditions;
9. Whether the consultant has available experienced, capable, and acceptable resource and design professional personnel as may be pertinent to the particular project;
10. Demonstrated continuing interest by the consultant in the success, efficiency, and workability of the project after it has been placed in operation;
11. The record of the consultant in keeping costs within project budgets and estimates;
12. Ability of the consultant to furnish adequate and effective supervision services, where such services are an inherent part of a "package" of services for which the consultant is employed;
13. Ability to obtain applicable insurance or bonding for the project;
14. All other things being equal, local consultants are preferred over non-local consultants; and
15. All other things being equal, a non-local consultant who associates with a local consultant for the purpose of the particular service required shall be preferred to a non-local consultant who does not so associate.