

REQUEST FOR QUALIFICATIONS/ PROPOSALS

SAN MIGUEL COMMUNITY SERVICES DISTRICT WATER AND SEWER MASTER PLANS UPDATE

Issue Date: December 19, 2024

Proposal Due Date and Time: Friday, January 31st, 2025 12:00 pm (Pacific time)

> Mailing Address: PO BOX 180 San Miguel CA 93451

> **Delivery Address:** 1765 Bonita Place San Miguel CA 93451

> > Contact:

Kelly Dodds, General Manager Kelly.dodds@sanmiguelcsd.org phone: 805-467-3388 / fax: 805-467-9212

REQUEST FOR QUALIFICATIONS/PROPOSALS SAN MIGUEL COMMUNITY SERVICES DISTRICT WATER AND SEWER MASTER PLANS UPDATE

The San Miguel Community Services District (District) has prepared this Request for Qualifications/Proposals (RFQ/P) for engineering services for the update of the District's Water and Sewer Master Plans for the community of San Miguel, San Luis Obispo County, California.

Proposal Due Date: January 31st, 2025 12:00 pm local time. Any proposals received after this date/time will be returned to the proposer un-opened. It shall be the proposers' responsibility to verify and confirm receipt of the proposals by the specified due date and time.

Proposal Delivery Location: 1765 Bonita Place, San Miguel, CA 93451 or via USPS at PO Box 180, San Miguel, CA 93451. To safeguard against pre-mature opening, all proposals shall be in sealed envelopes/containers, with a label containing proposal title, proposer's name, and proposal due date and time.

Number of Copies of Proposal to be Provided: 2 hard copies, one thumb drive. The thumb drive shall include a complete copy of the Proposal, EXCLUDING PROPOSED FEES.

Contact: Kelly Dodds, General Manager, San Miguel Community Services District, <u>kelly.dodds@sanmiguelcsd.org</u>, (805) 467-3388 for details and information regarding this RFQ/P and proposal requirements. Firms must notify Kelly Dodds via email of their intent to propose in order to receive any addenda or response to questions.

BACKGROUND

San Miguel is an unincorporated community in San Luis Obispo County, with approximately 2,820 residents. San Miguel is located approximately 7 miles north of the City of Paso Robles. The San Miguel Community Services District was formed in 2000 combining the San Miguel Fire District, County Service Area 1, San Miguel Sanitary District, and San Miguel Lighting Districts. The District currently provides fire services, street lighting and landscaping, wastewater collection and treatment, potable water production and distribution, and solid waste services. The District is Governed by a Board of five Directors and has a General Manager, Director of Utilities, six admin and Utilities

Personnel, a Fire Chief, Assistant Fire Chief and up to 20 paid on-call firefighters. The majority of operating funds for the District come from user fees and property tax.

The San Miguel Community Services District (SMCSD) completed a Water and Wastewater Master Plan Update in 2020. Since the completion of this plan, there have been some changes in the water and sewer system and more information is known about upcoming developments, necessitating this Master Plan Update. Additionally, the Master Plan Update should include a layout of facility needs to serve future developments and costs for use in the ongoing rate study and connection fee update. Much of the 2020 Master Plan analysis and projection methodology is still relevant and should be used as a basis for the update to streamline the consultant's efforts.

In 2024 SMCSD also developed and calibrated a water system model in Bentley WaterGEMs. The water model only includes the existing system and demand, which should be used and updated for this project. The District does not currently have a sewer model.

INFORMATION AVAILABLE

Consultants are encouraged to review current available project-related information electronically; such documents will be made available by download using the District's file sharing service. Contact Kelly Dodds for a download link. The following documents are available for review electronically:

- 2020 Water & Wastewater Master Plan Update
- 2024 Water Model Development and Calibration Report and WaterGEMS hydraulic model files
- Sewer system CAD files
- Water and Sewer GIS data

INQUIRIES DURING PROPOSAL PERIOD

Consultants must direct all inquiries to the District in writing, via email to the General Manager, Kelly Dodds <u>kelly.dodds@sanmiguelcsd.org</u>. All inquiries will be responded to in writing, and questions and responses will be disseminated to all consultant teams for their consideration. The origination of the questions will not be disclosed. All inquiries must be received no later than Friday, January 17th, 2025 (close of business) in order to receive responses from the District. Inquiries received after this deadline may not be responded to.

MANDATORY ON-SITE PRE-PROPOSAL MEETING

A mandatory pre-proposal meeting will be held on Thursday January 09, 2024, at 9:00 AM. This meeting will be held at the District's office at 1765 Bonita Place, San Miguel. The District may reject proposals from firms which did not attend this meeting.

ADDENDA TO RFP

Through the course of the proposal development, consultants may raise questions concerning the RFQ/P, which may impact proposals. The District will issue addenda as necessary to further clarify the requirements and expectations of the RFQ/P. Consultants shall acknowledge receipt of addenda in the proposal cover letter.

PROPOSAL REQUIREMENTS

<u>Submit One Proposal</u>. Prime consultants shall be limited to only one proposal/project team for the Project. Subconsultants, however, may be included in multiple proposals with various prime consultants.

<u>Proposal Rejection or Withdrawal</u>. Late proposals (submitted after the specified due date/time) shall be rejected by the District and returned un-opened to the Proposer. The District reserves the right to accept or reject any or all proposals. Proposals may be withdrawn by a signed written request submitted to the District at any time prior to 5 p.m. of the due date of the proposal.

<u>Project Manager</u>. The Project Manager shall be the same person named as Project Manager in the Proposal and shall be dedicated to this Project as appropriate to execute the project in a timely and effective manner. Should the designated Project Manager not be able to fulfill this commitment during the course of the Project, the Consultant shall notify the District within 10 working days of proposed personnel change and shall submit the qualifications of the new proposed Project Manager, subject to approval by the District.

<u>Agreement</u>. Consultants shall review the District's Standard Agreement, liability, and insurance requirements, included as **Attachment A** to this RFQ/P. Each individual firm submitting a proposal shall meet all the terms and conditions contained in the Agreement, and/or shall submit proposed exceptions to the Agreement in the Consultant's proposal. The District is willing to negotiate such requirements with candidates; however, the Proposer shall bear in mind that should a funding agency used by the District require specific terms and conditions not included in District's Agreement, Consultant shall abide by all funding agency requirements without exception. This Agreement and RFQ/P is for the design services and optional services for assistance during bidding and engineering support during construction.

<u>Agreement Execution</u>. The selected consultant shall execute the written contract included in Attachment A, with the District within 10 working days after notice of award has been granted by the District. Failure to accept and execute said Agreement will cancel the notice of award, and the District will continue negotiations with the next highest ranked firm.

<u>Proof of Insurance</u>. The District will require the individual or engineering firm selected to maintain general liability, automobile, workers' compensations, and errors and omissions insurance. Other required provisions will include the District's right to terminate the agreement, at its sole discretion, upon the provision of notice. Consultant shall provide proof of insurance in the form, coverages, and amounts specified in the Agreement within 7 working days following notice of contract award. Such insurance proof shall be a precondition of contract execution.

General Conditions.

- Preference will be given to Firms with offices within 120 miles of the District, Proposer shall indicate where the office that would service this contract is located.
- The District shall not be liable for any pre-contractual expenses incurred by any proposer, nor shall any firm include such expenses as part to the proposed cost. Pre-contractual expenses include any expense incurred by a proposal and negotiation of any terms with the District.
- The District reserves the right to withdraw this RFP at any time without prior notice and to reject any or all proposals submitted without indicating any reasons. Any award of contract for services shall be made to the firm best qualified and responsive in the opinion of the District.
- Proposals may, at the District's option, be rejected if they contain any alterations, additions, conditional or alternatives, are incomplete, or contain erasures or irregularities of any kind.
- The District reserves the right to reject any and all proposals. The District expressly reserves the right to postpone submittal opening for its convenience and to reject any and all submittals responding to this RFP.
- Proposal will NOT be opened publicly.
- The selected firm must agree to indemnify and hold harmless the District, its officers, agents and assigns from any liability or loss resulting from suits, claims, or actions brought against the District which result directly or indirectly from the wrongful or negligent actions of the consultant in the performance of the contract.
- The selected firm will be required to comply with all existing State and Federal labor laws including the applicable to equal opportunity employment provisions.
- The District reserves the right to negotiate special requirements and proposed service levels using the selected proposal as a basis. Compensation for services will be negotiated with the selected firm.
- All responses to this RFP shall become the property of the District and will be retained or disposed of accordingly.
- No amendments, additions or alternates shall be accepted after the submission date and time.
- All documents, records, designs, and specifications developed by the selected firm in the course of providing services for the District shall be the property of the District.
- Anything considered to be proprietary in the proposal should be so designated by the firm.
- Acceptance by the District of any proposal submitted pursuant to this RFP shall not constitute any implied intent to enter into a contract for services.
- The District reserves the right to issue a written notice to all participating firms of any change in the proposal requirements or submission schedule should the District determine, in its sole discretion, that such changes are necessary.
- All services provided by the firm shall be in accordance with State, Federal, County, and District's standards.

- The selected firm must comply with Government Code section 8355 in matters relating to providing a drug-free workplace.
- The Cost Principles and Procedures, 48 CFR, Federal Acquisition Regulations System, Chapter 1, Part 31 et. seq., are the governing factors regarding allowable elements of cost.
- The final Agreement between the District and the firm will include the administrative requirements set forth in 49 CFR Part 18, Uniform Administrative Requirement for Grants and Cooperative Agreements to State and Local Governments.

PROPOSAL FORMAT

<u>General</u>. Proposals shall be prepared in accordance with the format specified in this section. Proposals that do not follow this format will be subject to rejection by the District. Provide proposals in the following format:

- Provide your proposed fees in a separate sealed envelope, clearly marked with the proposer's company name and address, and labeled "Proposed Fees for SMCSD Water and Sewer Master Plan Update". Prime consultant fees shall be broken down by manhours per task, in accordance with the labor classifications and rates specified, and per Section 4 of the Proposal.
- Letter of Transmittal. Provide a brief transmittal letter (2 pages maximum) transmitting the proposal to the District.
- Table of Contents.
- Section 1. Project Understanding and Approach. Provide your team's understanding and approach to the overall project. Discuss issues and concerns and express your ideas and methodology on how best to approach and execute the project. Include your approach to project management, teamwork, communications, quality assurance/control, and cost and schedule controls. Describe your team's experience with various funding agencies for similar type projects.
- Section 2. Project Team/Qualifications. Provide an organization chart showing design team, organization/lines of communication, and team member qualifications germane to this project. Clearly state your proposed Project Manager and corresponding qualifications. The proposed Project Manager must be a California licensed Professional Engineer. Include all subconsultants as part of the proposed team and describe your past working relationships with each subconsultant. Full resumes shall be placed in Appendix A. Team member references shall be included in Appendix B. Provide a minimum of three references, two of which must be for the proposed Project Manager. State the contact/agency name, brief title/description of project, contact telephone number.
- Section 3. Relevant Project Experience. Provide your team's relevant project experience as it relates to the nature of this project, including the experience of proposed subconsultants. Include projects of similar nature, magnitude, and complexity to this project. Provide the year(s) the Work was performed and identify key team members and their roles on the project. Projects listed should

be specifically relevant to key aspects of the Water and Sewer Master Plan Update.

- Section 4. Scope of Services. Provide a detailed scope of services for the project. Embellish on the scope outline in this RFP. Include a subsection in this Section 4 specifically to present any exceptions to the Agreement for Services.
- Section 5. Conflicts of Interest. Firms submitting a proposal in response to this RFP must disclose any actual, apparent, direct, or indirect, or potential conflicts of interest that may exist with respect to the firm, management, or employees of the firm or other persons relative to the services to be provided under the Agreement for engineering services to be awarded pursuant to this RFP. If a firm has no conflicts of interest, a statement to that effect shall be included in the Proposal.
- Section 6. Project Schedule. Provide a detailed project schedule, in graphic format, along with written explanation of assumptions, or specific details, issues or concerns regarding the proposed schedule. Show graphically and clearly indicate all schedule components, including mandatory compliance schedules, those schedule items for District and agency review, and other items as deemed necessary. Include in the schedule all anticipated time allotments for agency reviews, public participation, and other schedule provisions. Clearly state all assumptions and basis for the proposed schedule. The proposal and project award schedule follows:

Item	Date
Proposal Release	12/19/2024
Pre-Proposal Meeting	1/9/2025, 9 am
Submit Questions By	1/17/2025, 5 pm
Proposal Due	1/31/2025, 12 pm
District Review of Proposals	2/3/2025 through 2/7/2025
Interviews (if desired by the District)	TBD
District Recommendation of Selected	2/10/2025
Firm/Staff Report	
Consultant Notice of Contract	2/27/2025
Award/Begin Contract Negotiations	

- Appendix A. Team Member Resumes
- Appendix B. References
- Appendix C. Billing Rates

 Manpower Estimate/Fees. IN A SEPARATE SEALED ENVELOPE, provide a manpower estimate, broken down by hours and task, demonstrating your understanding of the scope of work and level of effort required to accomplish all tasks. Provide proposed consultant fees, using the same hourly rates proposed in Consultant's billing rate schedule. Provide the standard billing rate sheets for the prime consultant and each subconsultant and include such billing rate sheets in Appendix C. DO NOT PROVIDE THIS MANPOWER ESTIMATE/FEES AS PART OF THE PROPOSAL, AND DO NOT PROVIDE PROPOSED FEES ON THE THUMB DRIVE. THE PROPOSED FEES SHALL BE SEALED IN A SEPARATE ENVELOPE, CLEARLY MARKED SUCH, AND ENCLOSED WITHIN THE ENVELOPE FOR THE HARD COPIES OF THE PROPOSALS.

<u>Proposal Length</u>. The District has no required proposal length; however, the District requests Proposers to be concise and to only include information germane to the Proposal.

<u>Other Requirements</u>. The hard copies of proposals shall be bound. **Minimum font size** for text shall be 11 point, except for headers, footers, footnotes, etc.

PROPOSAL RANKING CRITERIA

Proposals will be ranked by the District based on established ranking criteria. The value of each criterion is stated immediately following each criterion. Criteria and relative "point" values are as follows:

- Project Understanding and Approach, 40 points
- Team qualifications, 20 points
- Project Schedule, 20 points
- Responsiveness to RFP, 15 points
- Local Presence, 5 points

All proposals will be ranked on these criteria, and a short-list of a maximum of three firms will be chosen. If interviews are warranted, the District will select the interview times at random, and will notify each team as to their respective time slots for interviews. The interviews will consist of a half-hour presentation by the project team, followed by a one-hour question and answer period. The top candidates may be interviewed, and the top firm selected based on the outcome of the respective proposals and interviews. The top-ranked firm will then enter contractual and fee negotiations with the District and should the District and top-ranked firm not satisfactorily negotiate the agreement, the second-ranked firm will enter negotiations, and so forth.

OVERVIEW OF SCOPE OF SERVICES

Consultants shall prepare a scope of services to provide engineering services for the master plans update. Scope should focus on reviewing and updating the data in the 2020 Master Plans. The scope of services shall include services for the following:

- 1. **Progress Meetings and Coordination**. The Consultants project manager and project engineer shall attend a project kick-off meeting and progress meetings during the course of the project. The Consultant shall provide project oversight and coordination as necessary for successful completion of the contract engineering services.
- Research and Data Collection. Consultant shall collect, review, and analyze all available plans, reports, and records (including the 2020 Water and Wastewater Master Plan Update) regarding the project as necessary to successfully complete the engineering services for the project.
- 3. Update Water Demand and Sewer Flow Projections. Consultant shall evaluate water consumption, production, and wastewater flow data to establish current water demand and sewer flows. Analyze existing demand by land use type. Consultant shall review existing land use data and discuss land use forecasts with the District's service area. District staff will identify potential development projects for the Consultant to review. Consultant shall evaluate historic population growth, redevelopment potential, infill potential, accessary dwelling unit (ADU) capacity, and current land use planning, and develop water and sewer flow projections for the 20-year planning period in 5-year increments. Projects may include population and forecasts for the number of new service connections.

Develop peaking factors/ratios based on historic production data, WWTP flow data, reference literature, and review of other municipalities similar to the District. Develop water maximum day and peak hour demand factors. Develop sewer design factors for average and peak dry and wet flow conditions and include allowances for infiltration and inflow into the system.

Consultant shall provide brief technical memo summarizing water and sewer projections, including spatial allocation, land use forecast, and proposed peaking factors for review and approval prior to implementation.

4. **Establish Evaluation Criteria**. Consultant shall develop evaluation criteria for the water system and sewer collection system. Criteria may include minimum and maximum pressure, pipeline velocity, storage requirements, maximum sewer depth over diameter, and other design criteria. Criteria will be developed based

on the Districts standards, current regulations, and accepted engineering practices.

5. Water System Hydraulic Analysis. The Consultant shall update the District's existing hydraulic model to include projected demands. The District water model was developed and calibrated to current conditions in 2024. Consultant shall use the updated model to evaluate the hydraulic adequacy of the water system under current and projected demand.

Consultant shall first model existing demand and determine existing pressure and pipeline velocity for average day, maximum day, and peak hour demand. Also, the consultant shall determine the available fire flow under existing maximum day demand with a minimum residual pressure of 20 psi. Determine areas within the system that do not meet pressure, velocity, and fire flow requirements. Develop mitigation for each hydraulic deficiency. If there are multiple options for mitigation, recommend the most suitable alternative.

Then Consultant shall model projected future flows, and reevaluate system pressure, velocity, and fire flow. Consultant shall include extensions of the existing water system as needed to serve future development. Consultant shall identify locations in the water distribution system that have capacity constraints and develop mitigation for each hydraulic deficiency. If there are multiple options for mitigation, recommend the most suitable alternative.

The Consultant shall evaluate the capacity of existing water system production and future booster pumping facilities against current and future demands. Identify production and pumping deficiencies and make recommendations to improve deficiencies.

The Consultant shall also determine the necessary water system storage volume for the system under current and projected demands and compare the requirement storage to the current storage volume. The Consultant shall develop recommendations to improve storage deficiencies.

6. **Sewer System Hydraulic Analysis**. The Consultant shall develop and calibrate a computer hydraulic model of the District's sewer system and use this tool to evaluate the hydraulic adequacy of the sewer system under current and projected flow conditions. The District has CAD and GIS files of the sewer collection system that may be used in the development of the computer hydraulic model. Consultant shall allocate existing and future flows, and establish all criteria required to successfully perform hydraulic analysis of the sewer collection system and calibrate hydraulic model.

Consultant shall first model existing flows and determine existing depth of flow and velocity for average dry and wet weather flows, as well as peak dry and wet weather flows for all pipes. Also, determine existing remaining capacity or capacity exceedance for all sewer pipes for these flow conditions. Identify locations in the sewer collection system that have capacity constraints under existing peak dry and peak wet weather flows. Develop mitigation for each hydraulic deficiency. If there are multiple options for mitigation, recommend the most suitable alternative.

Then Consultant shall model projected future flows and determine depth of flow and velocity for average dry and wet weather flows, as well as peak dry and wet weather flows for all pipes. Consultant shall include extensions of the existing collection system as needed to serve future development and areas currently on septic systems that will be connected to the sewer in the future. Approximately 98 existing homes in the service area have private septic systems that plan to be connected to the sewer, including approximately 78 homes on the east side of the Salinas River.

Consultant shall also determine remaining capacity or capacity exceedance for all sewer pipes for the projected flow conditions. Identify locations in the sewer collection system that have capacity constraints under existing peak dry and peak wet weather flows. Develop mitigation for each hydraulic deficiency. If there are multiple options for mitigation, recommend the most suitable alternative.

The Consultant shall provide the data files of the hydraulic model to the District. The modeling software should be the latest version of either SewerGEMS or InfoSewer. Please describe your proposed software intended for use on this project including the reasons for the proposed software selection.

The Consultant shall evaluate the current collection system lift station capacity against current and projected flows. Identify pumping deficiencies and provide recommendations. This evaluation will not consider the pumping requirements needed for the septic to sewer project.

7. System Condition Assessment. The Consultant shall perform a desktop condition assessment of water and sewer system pipelines and facilities considering condition information collected from the District, including Staff knowledge, age, material, and expected useful lifetimes based on literature and District experience. Prepare annual budgets for system replacement and renewal based on condition assessment for inclusion in the recommended capital project list. Supplement with District provided condition-based projects.

- 8. **Prepare Water and Sewer Atlas Maps.** The Consultant shall update the District's Water and Sewer Atlas Maps based on the updated and calibrated hydraulic and sewer models, respectively. Consultant shall update the existing Water and Sewer Atlas Maps to include additional developments, installations, and field corrections. Consultant shall incorporate District Staff comments to prepare the final Water and Sewer Atlas Maps. GIS map packages of the existing atlas maps prepared in 2015 will be provided to the selected consultant.
- 9. Prepare Street Lighting Master Plan. The Consultant shall develop street lighting evaluation criteria based on input from the District and current standards. The Consultant shall perform a street lighting analysis in GIS to evaluate the adequacy of the current street lighting with the service area and develop proposed locations for additional street lighting to meet the established criteria. Existing street lighting in the service area is available in GIS. The Consultant shall compile the results of the street lighting analysis and create recommended street lighting projects for inclusion in the Master Plan Report.
- 10. **Develop Comprehensive Capital Project List.** The Consultant shall develop a comprehensive list of capital projects that address capacity, reliability, future development, and condition related deficiencies under existing and projected demands and flows. The program list shall be designed to enable the District's water distribution and sewer collection systems to accommodate the projected growth for short, intermediate, and long-term planning (5 years, 10 years, and 20 years). Establish criteria for determining the prioritization of the identified projects. Consultant shall prioritize projects as short term (1-5 years), intermediate term (5-10 years), and long term (10-20 years) projects.

Develop planning-level unit cost figures and estimate costs for all projects. The prioritized projects and costs will feed into the District's overall Capital Improvement Program and annual budgeting process. The costs for the short-term projects should be developed for use in the District's upcoming rate study.

The prioritized projects and costs shall be summarized in tabular format. For each project summarize the location, need to the project, project schedule/timing, estimated construction cost, and other relevant information such as existing and proposed size, existing and proposed material, slope, design capacity, projected flow, etc. Indicate whether projects are needed to address existing capacity and performance issues, to support growth, or maintain system condition. Each project should also describe its needed CEQA coordination, including if a project is exempt or its CEQA requirements will be addressed at the time the project is completed.

11. **Prepare Draft and Final Master Plan Reports.** Consultant shall compile the information developed in the previous tasks and create a Water and Sewer Master Plan Report. Consultant shall submit a Draft and Final Draft Report to the District for review and comment. Consultant shall address District comments from Draft and Final Draft Reports and incorporate edits/corrections into subsequent submittals. The Consultant shall submit PDF and one hard copy of Draft and Final Draft Reports. Consultant shall submit the Word document, a PDF, and three hard copies of the Final Report incorporating Staff and Board Comments.

Option Task: Board Meeting and Presentation. The Consultant shall develop a PowerPoint presentation that summarizes the development, conclusions, and recommendations of the Final Draft Master Plan Report. Consultant shall attend a Board meeting and provide a formal presentation of the Final Draft Report. Staff and Board comments shall be addressed and incorporated into the Final Report.

SUMMARY OF DELIVERABLES:

- 1. Draft Master Plan Report
- 2. Final Draft Master Plan Report
- 3. Final Master Plan Report
- 4. Updated Hydraulic Model files
- 5. Updated Atlas Maps (PDF) and GIS files

ATTACHMENT A – SMCSD STANDARD AGREEMENT

San Miguel CSD utilizes standard EJCDC agreements for professional services. A draft agreement can be provided upon request.