

REQUEST FOR QUALIFICATIONS
THE PETALUMA VALLEY GROUNDWATER SUSTAINABILITY AGENCY,
THE SONOMA VALLEY GROUNDWATER SUSTAINABILITY AGENCY
AND THE SANTA ROSA PLAIN GROUNDWATER SUSTAINABILITY AGENCY

OUTREACH & FACILITATION SERVICES

Deadline for Submission

5:00 p.m., Friday, September 1, 2023

I. INTRODUCTION

The Petaluma Valley Groundwater Sustainability Agency ("PV GSA"), the Santa Rosa Plain Groundwater Sustainability Agency ("SRP GSA") and the Sonoma Valley Groundwater Sustainability Agency ("SV GSA"), (collectively "GSAs"), are seeking qualifications from consultants or firms with experience in providing outreach and facilitation services for public agencies.

Applicants are not expected to have experience in all aspects of work described. Teams of firms are acceptable but not necessary. A list of qualified firms will be developed and used over the next three to five years. No specific projects have been identified. The GSAs do not guarantee work to any qualified firm. This is not a bid process.

II. BACKGROUND INFORMATION

On September 14, 2014, Governor Brown signed into law three bills collectively referred to as the Sustainable Groundwater Management Act (SGMA). SGMA requires the formation of groundwater sustainability agencies (GSAs) in state-designated medium and high priority basins. Sonoma County has three basin that must comply with SGMA (Petaluma Valley, Santa Rosa Plain and Sonoma Valley) and in 2017 a GSA was created in each basin.

The GSAs were formed for the purpose of developing, adopting, and implementing a Groundwater Sustainability Plan (GSP) for each basin to implement SGMA's requirements and achieve the sustainability goals outlined in SGMA. The three GSPs were approved by the California Department of Water Resources (DWR) in January 2023. The GSAs are now working to implement the GSPs and are seeking outreach and facilitation support services for that implementation.

Through contracts with the GSAs, Sonoma Water currently provides outreach and communication services, including materials development, quarterly news blog, media contacts, website development and maintenance and social media. The websites can be viewed at <https://petalumavalleygroundwater.org/>, <https://santarosaplainingroundwater.org/> and <https://sonomavalleygroundwater.org/>. Sonoma Water subcontracts with multiple outreach consultants for specific services.

In the future, the GSAs plan to contract directly with consultants for specific outreach services related to GSP implementation. Portions of this work have been recommended for funding under the Sustainable Groundwater Management Implementation Round 2 grant. Grant application work plans are available on our website at: sonomacountygroundwater.org/RFP

III. SCOPE OF WORK

Outreach services include a broad array of tasks to engage, inform and educate rural landowners and other stakeholders regarding programs and policies such as voluntary well monitoring and metering programs, water use efficiency programs, and groundwater management opportunities and regulations. Specific tasks could include:

- Developing scripts, filming, editing, captioning and all other tasks associated with the production of short videos, in English and Spanish;
- Creating social media content and graphics in English and Spanish; and
- Developing engaging, informative and persuasive written materials, including fact sheets, press releases, frequently-asked-questions and newsletter articles in English and Spanish.

Engagement services also include facilitation of technical working groups, with specific tasks including establishing meeting dates, developing goal-focused agendas, facilitating meetings to effectively achieve objectives, reporting meeting outcomes, following-up with meeting participants to resolve issues or questions and summarizing the working groups process and findings in a final written report. The technical working groups could be specific to each groundwater basin or could involve all three basins on common issues, such as the further development of Sustainable Management Criteria for interconnected groundwater and surface water.

Outreach services also include developing a Groundwater Data Dashboard that will easily allow people to track changes in groundwater levels, groundwater storage, groundwater quality, groundwater-streamflow interaction and other sustainability metrics. The dashboard will be developed for and shared by all three basins and will be populated with data from a variety of sources. Specific tasks will include development of the dashboard design and functionality; ensuring the site is accessible and fully Americans with Disabilities Act (ADA) Section 508 compliant; ensuring the dashboard scales to all screen sizes; includes search functionality, security and analytics tracking; and includes contact forms to email/database.

Many of the GSAs' projects are grant funded and therefore shall comply with the terms and conditions of the relevant grant and any applicable State of California requirements, laws, and regulations, including prevailing wage laws. All work that is completed under the Sustainable Groundwater Management Implementation Round 2 grant, must be completed by February 2026. Additional information about this grant, including a template grant agreement, is available at <https://water.ca.gov/work-with-us/grants-and-loans/sustainable-groundwater>.

IV. SCHEDULE

To the extent achievable, the following schedule shall govern the RFQ. The GSAs reserve the right to modify the dates below.

EVENT	KEY DATES
Availability of the Request for Qualifications	July 28, 2023 – September 1, 2023
Deadline for Submission of Questions	August 9, 2023
Closing date for the Request for Qualifications	September 1, 2023
Interviews (if needed)	September 25 and 26, 2023

Questions must be emailed to info@petalumavalleygroundwater.org by 5 p.m., Monday, August 9, 2023. Submissions must be emailed to info@petalumavalleygroundwater.org by 5 p.m., Friday, September 1, 2023. Large submissions may be transmitted via Dropbox or another file-sharing site, but an email with the file location and access information must be sent to info@petalumavalleygroundwater.org by 3 p.m., Friday, September 1, 2023.

V. QUALIFICATIONS

1. Relevant experience in one or more of the following categories:
 - a. Development and execution of community outreach and educational campaigns across stakeholder sectors and with the general public, including production of written materials and social media messages and graphics;
 - b. Video production and editing;
 - c. Website development and editing, particularly as it relates to the development of public-facing dashboards that incorporate multiple sources of technical data;
 - d. Facilitation of committees, advisory groups or other bodies which involve multiple stakeholders and which cover technical topics. Facilitation experience in groundwater or surface water is desirable.
2. Experience and qualifications commensurate with this project.
3. Demonstrated ability to provide culturally competent services.

VI. SUBMISSION REQUIREMENTS

Submissions must be emailed to info@petalumavalleygroundwater.org by 5 p.m., Friday, September 1, 2023. Large submissions may be transmitted via Dropbox or another file-sharing site, but an email with the file location and access information must be sent to info@petalumavalleygroundwater.org by 3 p.m., Friday, September 1, 2023. A sample agreement is enclosed. Please review the entire sample agreement carefully before submitting a Statement of Qualifications (SOQ).

1. **Cover letter** (no longer than 1 page): The cover letter should convey a clear understanding of the requirements and objectives, and why the respondent is uniquely qualified to be awarded a contract.
2. **Respondent's Qualifications:** Summary of overall qualifications and experience of the Respondent.
3. **Proposed Respondent Team:** The submission shall identify the Project Manager who will be primarily responsible for providing services to the GSAs, and other staff to be assigned to the team. Please include the qualifications, training, and certifications of the Project Manager, and

all other staff who will perform the services outlined herein. Include a resume for each, listing education, experience, and expertise in this type of work. Proposers shall also identify all subcontractors they intend to use for the proposed scope of work. For each subcontractor listed, proposers shall indicate what products and/or services are to be supplied by that subcontractor.

4. **Fee Schedule:** This section should identify billing rates for listed personnel.
5. **Conflicts:** Firms submitting proposals must disclose any actual, apparent, direct, or indirect, or potential conflicts of interest that may exist with respect to the firm, management, or employees for the firm or other persons relative to the services to be provided. Respondent should also identify whether it anticipates it would need to obtain conflict waivers from any existing clients. Respondent should identify how they would address any potential conflicts with respect to any member agencies and/or between GSA(s).
6. **References:** Please provide the names, addresses, email addresses, and telephone numbers of three (3) public agency clients who have contracted with the Respondent for services similar to those described in this RFQ within the last five years.
7. **Sample Agreement Exceptions:** Any proposed exceptions to the indemnification, insurance, or other standard terms of the sample agreement. Please make comments as specific as possible. Exceptions not explicitly stated in the SOQ will not be considered during negotiations. Please note that proposing significant changes to standard terms may result in a lower evaluation score. If standard terms are acceptable, include the statement "No exception to standard terms."

VII. EVALUATION CRITERIA

The following criteria will be used by the GSAs in evaluating submissions:

1. Experience and demonstrated competence of the identified key areas of service outlined in the Qualifications section of this RFQ.
2. To the extent two or more applicants are deemed equal in their qualifications, preference shall be given to those applicants with familiarity with groundwater management and key partners within the jurisdiction of the GSAs.
3. References and recommendations.
4. Comprehensive consultant fee schedule.
5. Thoroughness of submission.
6. Exceptions to standard terms in the sample agreement.

The GSAs reserve the right to award a contract based on written responses only, however oral presentations and written questions for further clarifications may be required of some or all of the respondents.

VIII. MISCELLANEOUS

1. Purchasing Policy

This solicitation is conducted in accordance with the GSA Board approved Purchasing Policies.

2. SOQ Preparation, Interview and Negotiation Costs

The GSA shall not be responsible for and/or shall not pay any costs associated with the preparation, proposal, or presentation of any SOQ, or costs incurred by the responding firms during any interview and negotiations phase of the solicitation process.

3. SOQ Withdrawal

To withdraw a SOQ, the responding firm must submit a written request, signed by an authorized representative, to the GSA. After withdrawing a previously submitted SOQ, the responding firm may submit another SOQ at any time up to the deadline for submitting SOQs.

4. SOQ Amendment

The GSA shall not accept any amendments, revisions, or alterations to the SOQ after the deadline for the proposal.

5. SOQ Errors

Responding firms are liable for all errors or omissions contained in their SOQ. Responding firms shall not be allowed to alter SOQ documents after the deadline for submitting a SOQ.

6. Incorrect SOQ Information

If the GSA determines that a responding firm has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the responding firm knew or should have known was materially incorrect, the SOQ may be rejected in the GSA's sole discretion.

7. Prohibition of Respondent Terms and Conditions

A responding firm may not submit the firm's own contract terms and conditions in a response to this RFQ. If a SOQ contains such terms and conditions, the GSA, at its sole discretion, may reject the SOQ.

8. Insurance

The apparent successful responding firm will be required to provide proof of insurance as set forth in the attached GSA's model contract prior to commencing work, and consistent with State law.

9. RFQ Amendment and Cancellation

The GSA reserves the unilateral right to amend this RFQ in writing at any time. The GSA also reserves the right to cancel or reissue the RFQ at its sole discretion. The GSA shall post copies of the RFQ and amendments on the webpage sonomacountygroundwater.org/RFP and it shall be the responsibility of the responding firm to monitor the posting of written responses.

Responding firms shall respond to the final written RFQ and any exhibits, attachments, and amendments.

10. Right of Rejection

- a. The GSA reserves the right, at its sole discretion, to reject any, and all SOQs or to cancel this RFQ in its entirety.
- b. Any SOQ received which does not meet the requirements of this RFQ may be considered non-responsive, and the SOQ may be rejected. Responding firms must comply with all the terms of this RFQ and all applicable state and local laws and regulations. The GSA

may reject any SOQ that does not comply with all the terms, conditions, and performance requirements of this RFQ.

- c. Responding firms may not restrict the rights of the GSA or otherwise qualify their SOQ. If a responding firm does so, the GSA may determine the proposal to be a non-responsive counteroffer, and the SOQ may be rejected.
- d. The GSA reserves the right, at its sole discretion, to waive variances in proposals provided such action is in the best interest of the GSA. Where the GSA waives variances in SOQs, such waiver does not modify the RFQ requirements or excuse the responding firm from full compliance with the RFQ. Notwithstanding any variance, the GSA may hold any responding firm to strict compliance with the RFQ.

11. Disclosure of SOQ Contents

All materials submitted in response to this RFQ procurement process become the property of the GSA. Selection or rejection of a SOQ does not affect this right. All SOQ information, including detailed price and cost information, shall be held in confidence during the evaluation and selection process. Upon the completion of the evaluation and selection process, indicated by approval of a contract for services emanating from this RFQ by the GSA Board or by rejection of all SOQs, the SOQs and associated materials shall be open for review by the public to the extent required by the California Public Records Act. By submitting a SOQ, the responding firm acknowledges and accepts that the contents of the SOQ and associated documents shall become open to public inspection.

12. Proprietary Information

A copy of each SOQ shall be retained for official files and will become public record after the award of a contract unless the SOQ or specific parts of the SOQ can be shown to be exempt by law. Each responding firm may clearly label part of a SOQ as "CONFIDENTIAL." The failure to so label any information that is released by the GSA shall constitute a complete waiver of all claims for damages caused by or related to any release of the information. If a public records request for labeled information is received by the GSA, the GSA will endeavor to notify the responding firm of the request. The responding firm shall have seven (7) working days after the GSA's receipt of the public records request to seek a protective order. Failure to so act shall constitute a complete waiver, and the GSA may release the documents marked "CONFIDENTIAL."