Request for Qualifications
Technical Assistance for Disadvantaged Communities
to apply for State Revolving Funds and other public water infrastructure funds

Advertise Date          June 16, 2023
Question Deadline       July 10, 2023 by 4:00pm Eastern Standard Time
                        Submitted via email fundingnavigator@policyinnovation.org
Due Date                August 16, 2023 at 4:00pm Eastern Standard Time
Submission              PDF format via email to fundingnavigator@policyinnovation.org

Overview
Through support from private philanthropic funds, the Environmental Policy Innovation Center (EPIC) is providing technical assistance for disadvantaged communities (DACs) to access State Revolving Funds and other public funds for water, wastewater, and stormwater infrastructure projects. DACs supported through this work are located in the Midwest (Michigan and Chicagoland: Illinois/Indiana), Mid-Atlantic (Pennsylvania, New Jersey, and Delaware) and the South (Arkansas and Mississippi). In addition, through work as a national Environmental Finance Center (EFC) selected by the US Environmental Protection Agency, EPIC will soon begin work outside the three regions. EPIC requests written proposals from national professional engineering firms with expertise in planning, design, environmental review, and financial management for water and wastewater systems, to select one or more offerors for a multiple award, indefinite delivery, indefinitely quantity (IDIQ), master services agreement to support the execution of this work. This request for qualifications is publicly available at www.policyinnovation.org/
Scope of Work

Background
Many communities require support to develop projects that are eligible for State Revolving Funds (SRFs) and other state and federal funds. Water Technical Assistance (TA) supports communities in this pursuit. The historic Infrastructure Investment and Jobs Act (IIJA), or the Bipartisan Infrastructure Law (BIL), provides $44 billion in SRF funding to the EPA to distribute to states. BIL mandates that 49 percent of funds provided through the Drinking Water SRF (General Supplemental, Lead Service Lines, and Emerging Contaminants) be provided as grants and forgivable loans to DACs. For the Clean Water SRF, 49 percent of funds must be provided as grants and forgivable loans to communities that meet the state’s affordability criteria or certain projects, consistent with the Clean Water Act. Each state has different deadlines and requirements to access SRF funds; however, in accordance with EPA requirements, all states require submission of an Intent to Apply prior to submitting the SRF application. Additionally, most states require SRF projects to be designed in order to submit an application.

Through its Funding Navigator and as a national EFC, EPIC provides TA to DACs to access water infrastructure funding. EPIC’s Funding Navigator work is focused in the Midwest (Michigan and Chicagoland (Illinois/Indiana), Mid-Atlantic (Pennsylvania, New Jersey and Delaware) and the South (Arkansas and Mississippi). The prioritized DACs have populations between 3,000 and 100,000 residents, though EPIC does work with utilities serving communities outside that range. EPIC has assigned a placed-based Funding Navigator Manager for each region as well as staff...
who work nationally. The goals for the project are to connect DACs with public funds for water infrastructure projects, and develop projects that are financially sustainable, resilient, and community centered; consider nature-based solutions; and result in faster lead service line replacement. The project work will generally follow the following process:

**Task Descriptions**
EPIC will screen prospective clients, engage the client with a letter of intent, conduct a gap analysis, and complete a technical assistance workplan. Depending on the needs and project priorities, EPIC will then coordinate with its TA partners to implement the recommended TA.

Tasks assigned to a TA partner may include but are not limited to the following:
- Condition/Needs Assessment
- Asset Audits including condition analysis and risk assessment
- Feasibility Analysis/Basis of Design Development
- Hydraulic/Hydrologic Modeling
- Updates of Record Drawings
- Implementation of geographic information systems (digitization of system assets)
- Lead Service Line Identification and Replacement program development
- Asset Management Plan Development
- Capital Improvement Plan Development
- Environmental Impact, Archeological, Cultural, and Historical Preservation Reports
- Rate Design and Financial Plan Development
- Water Distribution System Design
- Sewer Collection System Design
- Green Infrastructure Design
- Water Treatment Process Design
- Wastewater Treatment Process Design
- Contractor Identification
- Engineer’s Probable Cost for design, construction, and operation of proposed technical solutions
- Communications and Public Engagement/Outreach
- Equitable Program Design

**Deliverables**

Deliverables for the tasks described above may include, but not be limited to, the following:

- Studies, reports, or technical memoranda
- Bid Documents (specifications and construction documents)
- Hydraulic/Hydrologic Model
- Financial Model
- Geographic Information System Database
- Asset Database/Registry
- Permits
- Lead Service Line Inventories and Dashboards

**Contract Term**

The term of this engagement will be one year from contract execution, with the ability to renew annually through December 31, 2027.

**Submission Requirements**

Proposals submitted shall not exceed 20 pages, excluding appendices for personnel resumes and any other required forms.

**Minimum Requirements**

1. Experience providing services for programs of similar scope.

2. Experience of a minimum of five projects in the past five years that consist of the task descriptions listed in the Scope of Work for communities with a population between 3,000 and 100,000 persons.
3. Engineering firms with offices and/or licensed professionals located in Arkansas, Delaware, Illinois, Indiana, Michigan, Mississippi, New Jersey, or Pennsylvania.

Technical Proposal Submission Requirements

1. State the full name and address of the headquarters for your organization. Provide a map showing subsidiary office locations.

2. Submit resumes of executive project lead and professional personnel that will be assigned to work on the project. Develop a project experience matrix to demonstrate personnel have worked on tasks described in the Scope of Work.

3. State history of the firm in terms of length of existence, types of services provided etc. Identify technical details that make the firm uniquely qualified for this work. As applicable, identify projects that have resulted in an award of State Revolving Funds for clients with a population between 3,000 and 100,000 persons. Additionally, identify any other sources of federal funds your clients have been awarded for water, wastewater, stormwater, or green infrastructure projects your firm worked on.

4. Provide a description of a minimum of five but not more than ten projects in the past five years that demonstrate experience performing the tasks described in the scope of work for clients with a population between 3,000 and 100,000 persons. At least two of the project descriptions must include community (business/resident) engagement in project development. Description should include the original consultant services contract budget, your firm’s budget as a percentage of the contract budget, a brief statement of your firm’s involvement in the project, final consultant services contract budget, start and end date, any change orders issued to the contract and the reason, and any additional information which you believe will assist EPIC in evaluating past performance. Provide details about projects that resulted in more financially sustainable operations, factored climate data into project design and enhanced resiliency, incorporated nature-based solutions, engaged residents in project development/delivery, and/or accelerated lead service line replacement.

5. Provide the names, telephone numbers, and email addresses of at least three persons representing clients of communities with a population between 3,000 and 100,000 persons for whom the bidder has performed work similar to that proposed, and who may be contacted as references.

6. List any contracts that may have been terminated, including the reason. Provide the name, telephone number and email address of your client representative for any such contracts.
7. List descriptions of all legal proceedings, lawsuits, or claims which have been filed against any firm in the proposing team or any of the firm’s past or present employees within the past five years. Indicated circumstance where you actually paid all or part of the claim.

8. Provide hourly rate fee schedule for the positions that would be employed in delivering the services described in this request for proposal. Bidders should assume responsibility for office supplies, equipment, travel, etc. Fees will only be paid on an hourly rate basis and shall not exceed $300 per hour.

**Evaluation Criteria**

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<tr>
<th>Criteria</th>
<th>Points</th>
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<tbody>
<tr>
<td>1. Staff Experience providing the services described in the scope of work section</td>
<td>25</td>
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<tr>
<td>2. Firm Experience providing the breadth and depth of experience described in the scope of work section</td>
<td>55</td>
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<td>3. Fee Proposal</td>
<td>20</td>
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**Total Score** 100

*Notes:*

*a* Selection of a contractor for inclusion in this consortium does not guarantee follow-on contracts for further design, construction, operation or implementation of recommended actions. All contracts will be open for bid upon securing funding.

*b* All products developed during an assigned task order, and associated documentation and background information gathered in the course of the specific investigation, will be owned by EPIC for the use of the assigned client for this project. Information and data gathered will not be shared outside the assigned client contacts, nor used for other engineering investigations. The selected contractors may not consider the deliverables assigned to be proprietary, and may be used by the client in order to facilitate further design or implementation.