

**COUNTY OF SAN BERNARDINO / SPECIAL DISTRICTS DEPARTMENT  
ON-CALL PROFESSIONAL SERVICES RFP  
JANUARY 14, 2010  
PRE-PROPOSAL CONFERENCE AGENDA**

- 1. WELCOME / INTRODUCTIONS – Jeff Rigney, Director of Special Districts**
- 2. WHAT IS A SPECIAL DISTRICT? - Jim Oravets, Construction, Engineering & Operations Division Chief**
  - A. Over 101 individual districts in the form of CSA's, Improvement Zones, etc.**
  - B. Municipal type services (Water, Wastewater, Roads, Parks & Rec, Fire, etc.)**
  - C. Geographical Area Coverage**
- 3. RFP PURPOSE AND SCOPE – Greg Bacon, Senior Project Manager**
  - A. On-Call Services Defined**
  - B. Overview of Specific Anticipated Projects**
  - C. Typical Uses of Consultant**
  - D. Contract/Work Order Limits**
- 4. CONSULTANT RESPONSIBILITIES – Greg Bacon**
  - A. RFP Submission Requirements**
    - 1. Submission Deadline**
    - 2. RFP Preparation & Packaging**
    - 3. Attachments Required**
  - B. List of References**
  - C. Fee Schedule (in separate envelope)**
  - D. Position Classifications for Fee Comparison**
- 5. PROPOSAL SELECTION PROCESS – Greg Bacon**
  - A. Initial Submitted Proposal Review**
  - B. Selection Committee Review**
  - C. Final Selection/Interview**
  - D. Recommendation of Contract Award**
- 6. CONTRACT AWARD / ISSUANCE PROCESS – Greg Bacon**
  - A. Overview – BOS Approval Required**
  - B. Insurance Requirements**
  - C. Certifications**
  - D. On-Line Registrations – [www.sbcounty.gov/Purchasing](http://www.sbcounty.gov/Purchasing)**
- 7. TASK ORDER ISSUANCE / PAYMENT PROCESS – Greg Bacon**
  - A. Work Order Issuance/Approvals**
  - B. Invoice**
  - C. Direct Deposit Program**
- 8. QUESTIONS (RFI's) / ANSWERS**
- 9. CONCLUSION / DISMISSAL**

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**JANUARY 14, 2010**  
**RFI'S & FEE COMPARISON GUIDE**

1. Under RFP Section 2, You have Civil/Electrical/Mechanical Engineering all under one category. should we team with a civil firm for this RFP or can we submit on our own for the MPE work?

The Departments desire is to limit the amount of sub-consultant usage and thereby save on the mark-up costs that the primary or lead firm would charge. Therefore, we will be looking at selecting individual firms and not partnerships or teams in this solicitation.

2. Page 10 of 45 Section V. Indemnification – there are two different indemnifications; one for architects, landscape architects, engineers and surveyors; the other for construction management, geotechnical/materials/environmental consultants. Our geotechnical/materials and environmental consulting are conducted under the purview of engineers so we believe the indemnity for architects, landscape architects, engineers and surveyors should apply for the work scope the County is bidding. Please ask the County to reconsider their selection of indemnification for this work scope.

Unfortunately the County cannot and will not change their indemnification policy. If a consultant cannot comply with the County's requirement, they can elect to not do business with the County. Professional Services are for those services that primarily deal with office design work and limited field work. Consultants who primarily do most of the field work (geotech, inspectors, CM firms, etc,) are bound by the non professional indemnification clause per our County Counsel.

3. Page 37 of 45 Sample Contract Attachment G-7 - Insurance Failure to Procure Coverage – line 3 – please ask the County to insert “reasonable” between “...if it deems necessary and any” and “premiums paid by the County...”

Counsel agreed to the insertion of the word “reasonable” and the final contracts will have that change.

4. Will the insurance requirements disqualify us or can we obtain the proper limits of insurance if we are awarded the contract?

Consultants will submit copies of their current or anticipated Insurance certificates. If coverages do not meet minimum County requirements, then a letter from the insurance company stating that if the consultant is awarded a contract, will be issued the required coverages and endorsements. With that letter, a proposal would not be disqualified.

5. Do you want full resumes of our engineers or are summary resumes sufficient? And will the resumes count towards the page limits?

Full resumes are not required. Only include resumes from principal, main contract contact person and any PRIMARY professional that may work on a District assigned project. Resumes for office staff, technicians or draftsmen are not necessary. Primary resumes should be included in the proposal, however any supplemental resumes can be tabbed as an appendix and included without page restrictions.

6. Do you want the proposal letter on company letter head or on recycled paper?

Preferably both! But at the minimum should be on Company stationary (hard copy or electronically reproduced).

7. Does the page limit of 25 pages equal to 50 one sided pages ?

No, 25 pages means double or single sided.

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RFI'S Continued

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8. Is the fee proposal included in the 25 page limit or is it separate?

The fee proposal should be included in a separate sealed envelope but may be made a part of the RFP as an appendix without counting towards the page limit maximum.

9. Our Firm doesn't have any Municipal Service Experience, will that preclude us from being able to submit a proposal or will the proposal be disqualified?

Possibly, if other required criteria is not presented such as insurance, the required attachments, proof of professional licensing, etc, the proposal will be rejected. However if the minimum required elements are included, your proposal will compete against other firms and your experience factor will most likely score much lower thereby keeping your proposal from getting a qualifying score.

10. Would the District be willing to remove the words "agents" and "volunteers" from the indemnification obligation verbiage as stated in Section V. INDEMNIFICATION on page 10 of the RFP and from the Additional Insured provision of Section VI. on page 12 of the RFP (as well as from the Additional Insured article in the Sample Contract, RFP Attachment G, on page 37 of the RFP)?

No, the language as indicated for volunteers and agents is required as the County employs agents and volunteers in many of their districts and must be indemnified per County Policy.

11. Would the District be willing to add the following third party disclaimer to the contract?: "There are no third party beneficiaries of the District-Consultant Agreement and no one except the parties to this Agreement may seek to enforce its terms."

No, as there could be a third party involved in any given contract either brought in by the Consultant or the County/District.

12. Reference Sample Contract, RFP Attachment G-5, RFP page 35, Article 11. INDEMNIFICATION: Will the District substitute the word "consultant" in place of "design professional" for contracts with consultants other than design professionals?

Yes, this change can and will be accomplished prior to final contracts being sent to successful consultants. The contract included in the RFP was a SAMPLE contract that was utilized from a previous Professional Consultant service and hence still had the specific language

13. RFP Page 23 of 45, Section XI.B.3. The discussion of Cost Evaluations notes that hourly rates will be randomly selected, by discipline for the various personnel classifications, and competitively evaluated against those of similar disciplines and positions on a cost for cost basis. Given the multitude of methodologies used by consultants to classify their employees, what criteria will be used to ensure that the classifications used for the random hourly rate comparisons will result in an "apples to apples" evaluation?

Fee schedule with recommended employee classification cost comparisons will be handed out at the conference. These classifications will be utilized to compare the minimum cost for services on those employees per discipline.

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14. RFP Page 26 of 45. This Page is referred to as "Attachment B" (see bottom of page). How/where is "Attachment B" to be incorporated into the Proposal? Is "Attachment B" to be included immediately following the "Statement of Certification" (Attachment A) that is to be inserted immediately following the "Proposal Letter"? Should "Attachment B" be filled in as a form and attached or should similarly-labeled fields be incorporated into a particular spot in the Proposal?

The Proposal Attachment B should be detached from the RFP and completed to the best of the Consultants ability. It then should be included in the proposal preferably as an appendix and easily locatable in the proposal. The Consultant should check the box(es) that apply to the discipline(s) he is willing to provide and compete for by discipline.

15. Will the cover page, tabbed sections, and dividers count towards the 25 page proposal maximum?

The cover page will most likely count, however, the tabbed / dividers themselves will not be counted.

16. Will the construction management contract include geotechnical and deputy inspection services?

Construction Management will only include Construction Management and possibly inspection and deputy inspection services. Geotechnical will be handled separately and be given separate contracts. If your firm can handle both disciplines, submit one proposal and indicate in the proposal that your are competing for those other disciplines.

17. The RFP anticipates 22 overall contract awards. How many consultants are anticipated to pre-qualify per discipline?

There is no pre-qualification required. Each consultant will submit on their own qualification merit and be graded/scored according to the selection criteria and weighted scoring by a panel of 6 selection committee members. Highest overall scores will be reviewed and if further interviews are required to pare down to a finalized contract award list, then successful consultants will be notified.

18. How will RFP distribution and/or Task Order awards be conducted? Will it be a rotating list, will all firms compete on every task order or just a select few, and is there the possibility for sole sourcing?

All task order awards will be based on several factors, the consultants abilities and availabilities and/or previous knowledge of certain required criteria. The rotational method will most likely be utilized on many projects that don't have pre-determined criteria established.

19. Will County Policy No. 11-12 – Local Preference Policy be utilized when evaluating the On-Call Services proposals?

No, however a scoring scale of minor value will be utilized in the proposal scoring based on perceived task order response and potential travel costs associated with meeting attendance, design reviews and project site visits.

20. What delivery method will be implemented for the CM firm?

For this contract, the County's primary delivery method is design-bid-build. However, we have successfully utilized minor rehab work utilizing the multi-prime approach.

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RFI'S Continued

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21. Knowing that the county has more than 20,000 sq.miles of territory, and that the work order might include a few small projects at remote locations, is there any approximate criteria of how those projects would be bundled?

Each task order assignment will be based on one project per district at one location. Very rarely will multiple districts and/or sites will be bundled as a single project. That being said, a task order could be issued for a general feasibility study to evaluate County water systems, however if the fee costs will exceed \$50,000 then a more formal RFP may be required for that assignment.

22. In Section IX ("Proposal Submission"), Subsection B ("Proposal Presentation Instructions"), Paragraph 1, the RFP states that there is a limit of 25 pages for the proposal. Does the limit include appendices and attachments?

No, valid and brief appendixes and required attachments will not be counted towards the 25 page maximum. However if the technical screener determines that there is an excessive amount of unnecessary attachments and appendixes, he may count those towards the 25 maximum. Keeping the proposal as brief as possible is the key.

23. On the cover page of the RFP, the RFP number is "SDD090002", while in the header of the RFP the number is "SDD2009002". Will you please clarify which is correct?

The project numbers are the same for our purposes, however for this solicitation Project # SDD090002 will be used.

24. Is the County seeking a consultant who can provide all tasks listed under a single service area?

No, all Service Areas will be benefitting from the multiple contracts per multiple disciplines that will be awarded. The task orders will be issued predominately on a rotational basis per services required.

25. Would the County consider proposals from a consultant who specializes in two or three tasks under a single service area such as Environmental Site Assessments and Industrial Hygiene Services but does not perform Environmental Impact Reports in-house?

No, as the primary function for our selected environmental consultants will be conducting CEQA and NEPA functions to include EA's, IS's Mitigated Negative Declarations, FONZI's etc.... ESA's when needed (rarely) will typically fall to other firms (such as geotech or some larger environmental/civil firms) as we don't have a large need for ESA's.

26. Would the County consider utilizing a CM firm that did not have a registered PE on staff?

No, as many of the projects require some engineering oversight during construction and a licensed building contractor would not qualify to make an engineering decision surrounding a plan modification or a change in the intended approved plans should one be warranted.

## FEE COMPARISON GUIDE

Consultants should include at a minimum the following classifications in their fee schedules to be competitively evaluated against competing firms for the basis of cost analysis.

### ENGINEER/ARCHITECT/LANDSCAPE ARCHITECT & MPE Services:

PRINCIPAL ENGINEER (OR ARCHITECT) Could also be a company/firm officer or firm owner. This will be the highest salaried individual that would ever be involved in the contract and perform any work.

MAIN CONTACT PERSON - individual that will be administering the contract and be the single focal point to the Districts on all matters pertaining to the contract (Could be a Project Manager, Senior Engineer, Architect, associate, etc.)

SENIOR ENGINEER/ARCHITECT/LANDSCAPE ARCHITECT – The senior and supervising professional that would be most likely to work on any given task order either designing, performing calculations, analyzing complex engineering solutions or reviewing subordinate designer/engineer work.

STAFF ENGINEER/ARCHITECT/LANDSCAPE ARCHITECT - Main individual that will be tasked to perform the majority of all design and engineering work.

SENIOR PROJECT MANAGER – Individual responsible for the oversight of all district projects and their completion to include scheduling, specification preparation, etc. Could also fulfill any of the above roles.

Designer – that individual with technical and educational expertise to perform basic designs with engineering oversight.

(CIVIL ENGINEERS ONLY) 2-man Survey Crew – include costs per hour for typical survey crew.

Draftsman/Auto Cadd Operator – that technician that would typically be given the majority of computer plan production based on the direction of the lead design professional.

Cost Estimator – That individual who would accomplish the majority cost estimating on district projects.

Clerical – that individual who would be responsible in preparing and packaging documents to be submitted to the districts.

### ENVIRONMENTAL CONSULTANTS

PRINCIPAL / CORPORATE OFFICER - This will be the highest salaried individual that would ever be involved in the contract and any work.

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ENVIRONMENTAL CONSULTANTS CONTINUED:

MAIN CONTACT PERSON - individual that will be administering the contract and be the single focal point to the Districts on all matters pertaining to the contract (Could be a Program Manager, Senior Level, or Associate Level, etc.)

SENIOR ENVIRONMENTAL ANALYST/SCIENTIST/BIOLOGIST/ARCHEOLOGIST – individual responsible to analyze and determine complex environmental issues surrounding their specialties.

ASSOCIATE ENVIRONMENTAL ANALYST/SCIENTIST/BIOLOGIST/ARCHEOLOGIST – individual that will be tasked to perform the routine functions, research, analytical analysis and preparing reports for the districts

GIS/CAD SPECIALIST – that individual who prepares maps and other exhibits in the preparation of documents.

CLERICAL/OFFICE TECHNICIAN – that individual that will be assigned report and document preparation.

GEOTECH/GEOLOGY/MATERIALS TESTING

PRINCIPAL / CORPORATE OFFICER – This will be the highest salaried individual that would ever be involved in the contract and any work could be reviewer or report executer.

PROJECT MANGER/STAFF ENGINEER/GEOLOGIST – Main professional responsible for testing and materials review and analysis and providing professional opinions based on those test results.

SOIL TECHNICIAN – main individual who will be performing soils tests and analysis both in the field and in a laboratory. (State Prevailing Wage Rate)

CAD OPERATOR / DRAFTING –individual that will be preparing maps, charts & graphs for reports.

CLERICAL – that individual that will be responsible for report compilation, preparation and coordination.

FIELD/LABORATORY TESTS:

SOIL

Soil Compaction Tests (per test)

    Sand Cone Method

    Density Guage

Sand Equivalent Tests

Sieve Analysis (aggregate)

Moisture Content

R-Value

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### **GEOTECHNICAL CONTINUED:CONCRETE**

Compression Test 6x12 Cylinder

Field Concrete Control – (batching, sampling, slump, air entrainment and temperature)

Core Compression Test

### **ASPHALT TESTS:**

Stability, flow and Unit Weight

Marshall

Asphalt Concrete Mix Design (HVEEM or MARSHALL)

### **STEEL**

Tensile Strength #11 Bar or smaller

### **SPECIAL INSPECTIONS**

Deputy Inspector – ICC certified for the discipline required.

### **CONSTRUCTION MANAGEMENT**

**PRINCIPAL OR CORPORATE OFFICER** - This will be the highest salaried individual that would ever be involved in the contract and any work.

**MAIN CONTACT PERSON** - individual that will be administering the contract and be the single focal point to the Districts on all matters pertaining to the contract (Could be a Senior Project Manager, Project Manager or corporate officer)

**SENIOR PROJECT MANAGER** – that individual with responsible oversight and supervisory capacity on any tasked project.

**PROJECT MANAGER** – that individual with the primary duty responsibility of administering the project as assigned.

**SENIOR INSPECTOR** – that individual tasked with the supervisory inspection oversight of a tasked project.

**PROJECT INSPECTOR** – that individual that would be the primary inspector on the project.

**CLERICAL** – that individual with primary clerical responsibility in preparing reports and other documents.

All proposals should include typical travel mileage cost, mark-up costs for other services, and explanation for potential reimbursable costs (duplication costs, courier costs, shipping costs, etc.)

The above classifications will be a minimum unless the firm submitting the hourly rates is a small firm. Any classifications that do not apply will be omitted from the proposal cost sheet.