



Emergency Drought Grant Program

REQUEST FOR PROPOSAL

For

CONSULTING SERVICES

For

**Technology Based Information System:
Web Based Water Consumption Reporting, Analytics
and Customer Engagement Tool**

May 2015

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INTRODUCTION

The Santa Ana Watershed Project Authority (SAWPA) is a Joint Powers Authority, classified as a Special District (government agency). SAWPA focuses on a broad range of functions useful to its five member agencies: Eastern Municipal Water District (EMWD), Inland Empire Utilities Agency, Orange County Water District, San Bernardino Valley Municipal Water District and Western Municipal Water District (WMWD). These include water supply reliability, water quality improvement, recycled water, wastewater treatment, groundwater management, brine disposal, and integrated regional planning.

SAWPA is working with its member agencies and other water agencies to use grant funding provided by the Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act of 2006 (Proposition 84, Chapter 2) to implement the Emergency Drought Grant Program. The Program includes a project component to assist retail water agencies with reducing overall water demand in response to the current drought. The Program is being implemented in the SAWPA 2,850 square mile service area, which is the Santa Ana River Watershed, which includes approximately 120 agencies associated with water.

SAWPA is requesting proposals from qualified firms to develop and implement web-based water consumption, analytics and customer engagement tool to assist water agencies in educating customers on water consumption and to increase water efficiency consistent with the Emergency Drought Grant Program.

BACKGROUND

The Emergency Drought Grant Program was developed through the One Water, One Watershed (OWOW) implementation process which reflects a collaborative planning process that addresses all aspects of water resources in the watershed over a long term planning horizon. All projects developed through the process must reflect the OWOW 2.0 Plan, which is the Santa Ana River Watershed's Integrated Regional Water Management Plan. The approaches contained in the OWOW 2.0 Plan include multi-beneficial projects and programs that are linked together for improved synergy, proactive innovative, and sustainable solutions, integrated regional solutions supporting local reliability and local prioritization, watershed based project and programs that effectively leverage limited resources, promote trust and produce a greater bang for the buck, and integrates water supply, water quality, recycled water, stormwater management, water use efficiency, land use, energy, climate change, habitat, and disadvantaged communities and tribes.

A key component of the Emergency Drought Grant Program includes the development of a Technology-Based Information System consisting of tools providing information tailored to water customers based on their water use. It is envisioned through the implementation of a web based Water Consumption Reporting, Analytics and Customer Engagement tool, that over the first three years of implementation, an average of 3,236 acre feet of water per year can be saved.

OBJECTIVE

The consultant will be expected to develop and implement a web-based water consumption, analytics and customer engagement tool, consistent with the goals of the Emergency Drought Grant Program. This web-based tool will deliver personalized water consumption reports to retail water agency customers showing comparisons of household water use to various indicators and customized messaging and recommendations for taking water conservation actions. To support retail agencies adopting the tool, the consultant will provide outreach, through workshops to instruct agency staff on the use of the tool. Also, the consultant will coordinate with SAWPA staff and member agency representatives through regular meetings.

SCOPE OF WORK

The scope of this project will include the following work activities.

Web Based Water Consumption Reporting, Analytics and Customer Engagement Tool

The consultant will develop and implement a web-based Water Consumption Reporting, Analytics and Customer Engagement Tool for water retail agencies in the Santa Ana River Watershed and the EMWD and WMWD service areas within the Upper Santa Margarita Watersheds (USMW).

Task 1 - Implementation

The consultant will describe in detail their approach for developing and implementing a tool to be applied to the evaluation of customer water consumption. This will include a description of the methodology applied including a description of the platform(s) on which the system operates, algorithms to evaluate customer water consumption, an inventory of data and data sources, as well as, an estimate of per capita water savings.

The consultant will coordinate with retail water agency staff to assemble appropriate customer data to create and deliver personalized water consumption reports to agency customers showing comparisons of household water use to criteria such as; similar home size, lot size, ET zone, previous year's water use, seasonal variation, etc., as well as available data from other sources.

The consultant will provide customized messaging and recommendations agency customers for taking water conservation actions. Customized messaging will be developed by the consultant with the input of individual retail water agencies. This will include six bimonthly engagement reports produced by the tool and delivered to customers.

The reporting, analytics and engagement tool will be implemented for a sufficient period of time for participating retail water agencies to achieve the maximum annual water savings benefits. (Minimum average savings of 3,236 acre feet of water per year over three years).

Deliverables:

- Documentation describing in detail the tool and key features including:
 - Detailed description of methodology including inputs and algorithms.
 - Customized customer messages.

Task 2 - Outreach

The consultant will conduct workshops to provide outreach to instruct agency staff on the proper use of the tool, with approximately three being conducted throughout the three counties of the Santa Ana River Watershed and two workshops in the USMW (approximate total of five workshops).

Deliverables:

- Documentation of participating agencies in workshops, including sign-in sheets.
- Outreach materials.

Task 3 - Quantify and Report Water Savings Benefits

The consultant will prepare annual water savings reports (for a duration of ten years, as required by Prop 84 grant language) detailing the water savings benefits achieved by the retail water agencies from the implementation of the web-based Water Consumption Reporting, Analytics and Customer Engagement Tool by the consultant and the methodology describing how the benefits are quantified and isolated from the effect of other variables such as local weather conditions.

Deliverables:

- Annual Water Savings Reports.

PROPOSAL REQUIREMENTS

Responses to this RFP must be made according to the requirements set forth in this section for content and sequence. Failure to adhere to these requirements or to include conditions, limitations, or misrepresentations may be cause for rejection of the proposal. Any correction and resubmission by the proposer will not extend the time for evaluation of the proposal. Responses to this RFP shall be prepared as concise as possible. The proposal should be not more than 25 pages long, not including resumes that may be included in an appendix. Submittal of boilerplate marketing materials is discouraged.

All proposals must include the following information:

1. Cover letter, including name, telephone number, fax number and address of the firm.
2. Background information about the proposer, including technical qualifications, size of firm and licenses. Description of the proposer's business; i.e., individual, partnership, joint venture, etc., and background information of subcontractors to be used.
3. Description of the proposer's experience. A list of similar services and project descriptions undertaken by the proposer (preferably with proposed project personnel), with beginning and ending dates, name, address, phone number, fax number, and e-mail address of a contact person for each reference.
4. Organization chart showing proposed management and project team.
5. Complete list of personnel, including subcontractors that will be dedicated to this project.
6. The names and qualifications of staff who will participate in the project.
7. Project Schedule and Approach that details how the consultant will complete each of the tasks in the Scope of Work.
8. Fee proposal shall include breakdown of labor hours by employee billing classification, expense reimbursement schedule that includes cost of non-labor and sub-consultant services. Fee proposal shall be broken down by major tasks. All columns and rows shall have totals.
9. Hourly billing rates for personnel to be assigned to the project.
10. Miscellaneous/Exceptions. Respondents shall thoroughly review the contents of this RFP and shall submit all supplemental information, required in this section of miscellaneous information. A draft contract agreement is enclosed within this RFP ([Exhibit A](#)) that the consultant/firm will be required to sign; the respondent must identify any exceptions to that draft agreement as an element of the proposal submitted for review and consideration.

SUBMITTALS

Submit a complete electronic copy of the proposal and related information to Mark Norton, Water Resources and Planning Manager at: mnorton@sawpa.org.

All proposals must be received by **5:00 p.m. on Monday, June 15, 2015**. Proposals received after the stated time will be returned unopened and will not be considered. Thereafter, a review panel, composed of members of the Project Agreement (PA) 22 Committee and SAWPA staff, will conduct question and answer interviews. If additional information is needed, contact Rick Whetsel at (951) 354-4222 or rwhetsel@sawpa.org.

TERM OF AGREEMENT

The Agreement period will be for up to three years, beginning in FY 2015-16.

PROPOSED SCHEDULE

RFP Published	May 15, 2015
Responses due	June 15, 2015
Recommendation to PA 22 Committee	June 25, 2015
Recommendation to Board of Directors	July 7, 2015 (tentative)

EVALUATION CRITERIA

Evaluation of qualifications will be conducted on the following:

- Responsiveness to the RFP
- Experience and qualifications of the assigned individuals/firm
- Project Approach and understanding of needs
- Appropriateness of proposed fee structure
- Project schedule
- Anticipated value and quality of services received

SAWPA reserves the sole right to evaluate and select the successful proposal.

The selection process is anticipated to include an evaluation of the proposal and an interview.

GENERAL REQUIREMENTS

1. All proposers are hereby advised that this RFP is an informal solicitation and is not a commitment or offer to enter into an agreement or engage into any competitive bidding or negotiation pursuant to any statute, ordinance, rule, or regulation. SAWPA reserves the right to negotiate with any qualified source. SAWPA reserves the right to reject any or all proposals for any reason or for no reason at all.
2. SAWPA reserves the right to request further information from the proposer either in writing or orally. Such request will be addressed to that person or persons authorized by the proposer to represent the proposer.
3. SAWPA reserves the sole right to judge the proposers' representations, either written or oral.
4. Proposers understand and agree that submission of a proposal constitutes acknowledgement and acceptance of, and a willingness to comply with, all of the terms, conditions, and criteria contained in this RFP.
5. False, incomplete, or unresponsive statements in connection with a proposal may be sufficient cause for the rejection of the proposal. The valuation and determination of the

fulfillment of the above requirement will be SAWPA's responsibility and its decision shall be final.

6. SAWPA reserves the right to interpret or change any provisions of this RFP at any time prior to the proposal submission date. Such interpretations or changes will be in the form of addenda to this RFP. Such addenda will become part of this RFP and may become part of any resultant contract. Such addenda will be made available to each person or organization that has received an RFP. Should such addenda require additional information not previously requested, a proposer's failure to address the requirements of such addenda might result in the proposal not being considered.
7. All proposals submitted in response to this RFP will become the exclusive property of SAWPA. At such time as SAWPA's recommendation to the SAWPA Board relative to proposal selection appears on the Board Agenda, all such proposals become a matter of public record, and shall be regarded as public records, with the exception of those parts of each proposal which are defined by the proposer as business or trade secrets, and so marked, as "confidential" or "proprietary." SAWPA shall not in any way be liable or responsible for the disclosure of any such proposals or any part thereof if disclosure of any such proposals or any part thereof is required under the Public Records Act.
8. SAWPA shall not in any way be liable for any costs incurred in connection with the preparation of any proposal submitted in response to this RFP.