



Beaumont-Cherry Valley Water District
Request for Proposals
For
Grant Writing Consulting Services

Beaumont-Cherry Valley Water District
560 Magnolia Ave,
Beaumont, California 92223
(951) 845-9581

RFP Posting Date
July 3, 2018

RFP Due Date
July 31, 2018
At 4:00 P.M.

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SECTION A BACKGROUND

I. INTRODUCTION

Beaumont-Cherry Valley Water District (District or BCVWD) invites qualified firms/consultants to submit proposals for contractual grant writing services. The District is seeking to contract with an individual or firm that specializes in the management of the overall grant process and can assist the District to maximize the benefits of grant funding. The required services are herein described in the Scope of Work.

II. DISTRICT PROFILE

The District was formed in 1919 as the Beaumont Irrigation District under California Irrigation District Law, Water Code Section §20500 *et seq.* The name was changed to the Beaumont-Cherry Valley Water District in 1973. Beaumont-Cherry Valley Water District is a California Special District that provides potable and non-potable water service within its 28 square mile service area.

The District is located in the foothills of the San Bernardino Mountains, approximately 75 miles east of Los Angeles along interstate 10. With a service area encompassing approximately 28 square miles, the District provides potable water and non-potable water service to over 48,000 residents within the City of Beaumont and the unincorporated Community of Cherry Valley in Riverside and San Bernardino Counties in Southern California.

III. BACKGROUND AND OBJECTIVE (BCVWD)

The District is governed by a five-member Board of Directors elected at-large to four year terms by BCVWD's constituents. The General Manager administers the day-to-day operations of the District in accordance with policies and procedures established by the Board of Directors.

It is the intention of the District to apply for grants which address documented District needs associated with services delivery, necessary capital infrastructure improvements and water and non-potable water recharge and recovery project(s). In addition, it is the intent of the District to apply for grants which not only are consistent with identified District needs but those grants that can be properly and efficiently administered by staff taking into account existing duties and responsibilities. The goal of the District's grant program is to secure funding for services and projects which the District otherwise would be required to utilize Capital Replacement funds.

SECTION B SCOPE OF WORK

I. SCOPE OF SERVICES

The District is seeking a Contractor/Consultant to provide grant writing services for Beaumont-Cherry Valley Water District. These services would include researching grants for which the District meets application criteria, preparing and submitting grant applications, and fulfilling administration requirements for successful grants. The proposal should provide pricing options for each Scope of Services component listed below together with a suggested budget for each component of the Scope. Specific services, although not all-inclusive, to be performed are as follows:

Funding needs analysis – Work with the District’s departments to assess the validity of current funding priority areas and identify new priority areas for funding.

1. Review District projects for grant opportunities
2. Grant funding research – Conduct research to identify grant resources including, but not limited to, federal, state, foundation, agencies and organizations that support the District’s funding needs and priorities in the following general areas by way of illustration and not by way of limitation:
 - Infrastructure Development and Maintenance
 - Recycled/Non-Potable Water
 - Storm Water
 - Water Conservation Initiatives
 - Watershed Restoration
 - GIS Geographic Information System
 - Raw Water and Recycled Water Recharge Projects
 - Storm Water Capture Projects
3. On-call grant research – In addition to the areas defined above, other areas may be also identified through the Funding needs analysis process and throughout the duration of the contract.
4. Grant proposal development – Provide grant proposal writing services associated with:
 - Grant application review and preparing a timeline and chart of tasks for grant submission.
 - Writing all sections of a grant applications and completing grant applications on behalf of the District, including the preparation of funding abstracts, production and submittal of applications to funding sources.
 - Ensuring that letter of support and other required certifications or documents are submitted with the grant timeline.
 - Completing tasks (including but not limited to reports and budgets) for post-award administration and accountability in accordance with the grant timeline.
 - A copy of each grant application submitted is to be provided to the Beaumont-Cherry Valley Water District.
5. Monthly reports – the successful contractor/consultant shall submit monthly reports to the District summarizing the amount of time expended and describe activities undertaken during the previous month.

Firms or individuals submitting a response to this RFP shall provide the District with a detailed description of the work that will be completed and other information as requested in this RFP.

II. PROPOSAL REQUIREMENTS

Proposer must submit a detailed proposal which includes, at a minimum, the following:

1. Define the methodology/approach to be used to identify the needs of the District which would be eligible for funding through grants, including whether costs will be hourly or per grant, written and submitted.
2. Generally, detail the involvement and role of District staff and District resources in the grant writing process. Describe, in detail, the process you would utilize to prepare the actual grant application.
3. List your experience in the identification and preparation of grants for special districts. Specifically, detail your experience with federal and state grants for infrastructure improvement and maintenance, storm water, water conservation initiatives, watershed restoration, GIS Geographic Information systems, technology community development and capital assets.
4. List up to five (5) funded grants which you developed detailing the funding source, amount requested and amount funded. As well as a list of grants for which the Beaumont-Cherry Valley Water District would qualify and that your organization would pursue on our behalf.
5. Example of Grant Application: Attach an example of a grant application that was written by you and successfully funded for an agency (preferably from a comparable California water district).
6. Describe the background, experience and qualifications of the person(s) who will act as the grant writer and the qualifications of any staff who will assist with the preparation of grant applications (include their role, education, relevant experience and related qualifications).
7. Attach a list of references. At least two of these should be from Water Districts/Cities in California. Include the name of contact, affiliation, address, direct telephone number and email address.
8. Describe in detail the fee structure you propose for providing grant writing services.

III. SELECTION

The District will make its selection based on its review of the proposal submitted. The criteria will include qualifications, experience, fee structure, and the ability to meet the needs of the District.

Firms/Consultants wishing to submit an RFP should meet the following minimum qualifications:

1. Excellent written and verbal communication skills.
2. Highly organized with the ability to manage prospect identification and evaluation.
3. Proficient in research, interpreting research, and analyzing data.
4. Must demonstrate a proven track record of successful grant writing results for federal, state, and local grant applications.
5. Must have a physical office location in California.

IV. PROPOSAL CONDITIONS AND FORMAT INFORMATION

So that competing proposals can be compared equally, firms/consultants must assemble their proposals in strict adherence to the layout requirements: (Failure to follow all proposal layout requirements may result in disqualification of your proposal for being non-responsive).

Proposal Form (Mandatory)

Submitted herewith is our proposal to perform the Grant Writing Services for the Beaumont-Cherry Valley Water District.

The undersigned agrees to perform the grant writing services specified at a total cost not to exceed the price quotation indicated below.

The Contract will be performed in accordance with requirements set forth in the Request for Proposal and the District's standard professional agreement. Services will be performed by the personnel identified in the "Statement of Qualifications".

	<u>Not-to-Exceed</u>
Initial Review of District Projects for grant opportunities:	\$ _____
Initial Grant Funding Research:	\$ _____
For 12 consecutive months from (<i>September</i> 2018 through <i>August</i> 2019) (Include how that price is quoted (e.g. per month, per grant, on-call, etc.):	\$ _____
For 12 consecutive months from (<i>September</i> 2019 through <i>August</i> 2020) (If renewed):	\$ _____
For 12 consecutive months from (<i>September</i> 2020 through <i>August</i> 2021) (If renewed):	\$ _____

All questions should be in writing and directed to Yolanda Rodriguez, Director of Finance and Administrative Services.

The signature of an authorized representative must appear on the cover sheet of the firm's/consultant's proposal. The signature shall be interpreted to indicate the firm's/consultant's willingness to comply with all the terms and conditions set forth in this solicitation, unless specific written exceptions are noted.

Proposals should be brief and concise, devoid of extraneous material and promotional information. They should be in sufficient detail to allow a thorough evaluation of the plan of work and its correlated costs.

Statement of Qualifications:

The proposal must be assembled in the following order, with tabs separating each section:

1. A description of the organization's/consultant's professional qualifications.
2. A statement indicating the number of employees, by level, which will perform the grant writing and related services.
3. A resume for each employee who will be assigned to the District's grant writing services, including:
 - a. Name of individual
 - b. Education/professional credentials
 - c. Experience with grant writing services
 - d. Hourly rates to be charged
4. A separate listing of current and prior clients indicating the following:
 - a. Types of service performed; and
 - b. Names, addresses and telephone numbers of persons who may be contacted by BCVWD staff as references.
5. Indicate availability to proceed with work on or about September 3, 2018 and include a tentative schedule for completing the grant availability research, grant applications and deliverables.
6. In a separate sealed envelope, provide a not-to-exceed cost estimate adequate to cover the scope of the service. The cost estimate should be itemized by task and include a list of charge out rates related to the names of key personnel to be used by the firm/consultant for this service. Include time, materials, travel, and other expenses, which may be associated with the duties and obligations under this Request for Proposals. All costs must be identified. This process is not considered a bid, nor will cost alone decide who is selected.

Please note that BCVWD relies heavily on the not to exceed amount and is reluctant to grant further increases unless substantial reasons are made for overage. A requested payment schedule should accompany the work schedule.

V. CONTRACT AWARD

Issuance of the Request for Proposals (RFP) and receipt of proposals does not commit BCVWD to award a contract. BCVWD reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with other than the selected company should negotiations with the selected company be terminated, or to cancel any section of this RFP. BCVWD also reserves the right to apportion the award among more than one company.

Any agreement resulting from this RFP will be signed only after successful negotiation of contract terms and conditions and all applicable procedural requirements have been met.

An award under this RFP will not be based solely on the lowest price. If an award is made, it will go to the respondent(s) with the best overall proposal. The successful proposal will be competitively priced and provide for adequate service to meet BCVWD's needs.

Staff will review and evaluate all qualified proposals utilizing a forced ranking system. BCVWD may conduct telephonic interviews with top ranked candidates as well as reference checks.

VI. EVALUATION PROCESS AND SELECTION CRITERIA

The District will review all submittals and make a recommendation based upon the established evaluation criteria. After the proposals have been evaluated, the highest ranked firm/consultant may be interviewed. All firms/consultants submitting a proposal will be notified in writing as to their status in the selection process.

The criteria for selection will be based on, but not limited to, the following:

- Experience and qualifications of personnel assigned to provide the grant writing services and their availability.
- References from clients with similar services provided.
- Price proposal (including expenses)

Final selection will be made based upon both the written proposals and the interview. Information contained in the cost envelope will be secondary and will be opened after the proposals have been reviewed; how that information is used is at the discretion of the District.

VII. DISCRETION AND LIABILITY WAIVER

The District reserves the right to reject all proposals or to request and obtain from one or more of the firms/consultants submitting proposals, supplementary information as may be necessary for District staff to analyze the proposals pursuant to the firm's/consultant's selection criteria.

The District is not liable for costs incurred by the firm/consultant for the cost of the proposal. The firm/consultant, by submitting a response to this RFP, waives all rights to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.

All proposals shall be binding for a period of 90 days after the proposal due date. The District also reserves the following rights and options with respect to this RFP:

- To re-issue this RFP with or without change or modification, at any time prior to the District's execution of a Professional Services Agreement pursuant to this RFP;
- To cancel this RFP with or without issuing another request for proposals;
- To supplement, amend, substitute or otherwise modify this RFP at any time prior to the District's execution of a Professional Services Agreement pursuant to this RFP;
- To waive informality, defect, non-responsiveness and/or deviation from this RFP that is not, in the District's sole judgment, material to the proposal;
- To request modification of some or all of the proposals following evaluation by the District;
- To request clarifications of any proposals;

- To negotiate simultaneously, or otherwise, with one or more Respondents; and
- To discontinue and resume negotiations with one or more Respondents.

VIII. INSURANCE REQUIREMENTS

The chosen firm/consultant will be required to maintain insurance coverage throughout the course of the Professional Services Agreement, and shall provide BCVWD with evidence of said coverage as set forth in the Professional Services Agreement. The requirement is subject to change and modification pursuant to review by the District’s Legal Counsel. Please review contract language and insurance requirements prior to submitting proposal and note any proposed exceptions to the Agreement tenets in your proposal. The Professional Services Agreement is attached.

IX. PROPOSAL SCHEDULE

**This is a tentative schedule and may be modified at the District’s discretion.

Notice Inviting Proposals for Grant Writing Services	July 3, 2018
Proposals Due	July 31, 2018 at 4:00 p.m.
Evaluation & Possible Interview	August 1 – 2, 2018
Board of Directors Approval	August 23, 2018
Contract Award	August 28, 2018

X. DIRECTIONS FOR SUBMITTING PROPOSAL

Closing Date: All proposals must be received by 4:00 p.m. on Tuesday, July 31, 2018.

Proposals: Please submit one (1) original unbound copy, and three (3) copies in a sealed envelope marked – **Proposal for BCVWD Grant Writing Services**, and one (1) digital copy in PDF format to the the address below.

Not to Exceed Cost Estimate: Please submit one (1) original unbound copy, and three (3) copies in a sealed envelope separate from the Technical Proposal marked **Cost Proposal for BCVWD Grant Writing Services** and one (1) digital copy in pdf format to the following:

Beaumont-Cherry Valley Water District
 Attn: Yolanda Rodriguez
 560 Magnolia Ave
 Beaumont, CA 92223
yolanda.rodriquez@bcvwd.org

Each sealed envelope containing a bid proposal must have, on the outside:

- The name of the bidder

- The bidder's address
- The statement "GRANT WRITING SERVICES: DO NOT OPEN UNTIL THE TIME OF BID OPENING"

The proposal must be received at the specified address by the closing date and time indicated above. Firms/consultants mailing or shipping their proposals must allow sufficient delivery time to ensure timely receipt of their proposals. Late proposals will not be accepted.

Beaumont-Cherry Valley Water District reserves the right to reject any or all proposals, to waive any informality or irregularity in any proposal received, and to be the sole judge of the merits of the respective proposal received.

SECTION C SPECIAL PROVISIONS

I. ACCURACY OF THIS SPECIFICATION. This specification is believed by the District to be accurate and to contain no affirmative misrepresentation or any concealment of fact. In preparing its bid, the bidder and all subcontractors named in its bid shall bear sole responsibility for bid preparation errors resulting from any misstatements or omissions in this specification which could easily have been ascertained. Although the effect of ambiguities or defects in this specification will be as determined by law, any patent ambiguity or defect shall give rise to a duty of the bidder to inquire prior to bid submittal. Failure to so inquire shall cause any such ambiguity or defect to be construed against the bidder. An ambiguity or defect shall be considered patent if it is of such a nature that the bidder, assuming reasonable skill, ability, and diligence on its part, knew or should have known of the existence of the ambiguity or defect. Furthermore, failure of the bidder or subcontractors to notify the District in writing of specification defects or ambiguities prior to bid submittal shall waive any right to assert said defects or ambiguities subsequent to submittal of the bid.

II. QUESTIONS AND INQUIRIES

Questions concerning this RFP may be submitted in writing or emailed no later than Wednesday, July 25, 2018:

Beaumont-Cherry Valley Water District
Attn: Yolanda Rodriguez, Director of Finance and Administrative Svc.
560 Magnolia Avenue
Beaumont, CA 92333
E-mail: yolanda.rodriquez@bcvwd.org

All questions and responses will be published with the RFP document on the BCVWD website. This information will be located on the Home Page, under "Our District" on the *Current Solicitations* Tab.

SECTION D DISTRICT'S PROFESSIONAL SERVICES AGREEMENT

A **sample** of the District's Professional Services Agreement is provided for review (attached). Submission of a Proposal is the Contractor's willingness to accept the terms of the agreement.

Please specifically identify each and every term of the agreement that your firm/consultant is unwilling to accept and the reason therefore.