

151 Main Street W
Monmouth, OR 97361
Office: 503.838.2173
Fax: 503.838.0201



Promoting pride, progress and
friendly hometown values

September 24, 2018

RE: City of Monmouth Stormwater Utility RFP

Dear Sir or Madam:

The City of Monmouth is requesting proposals from qualified firms to provide professional services for the development and implementation of a stormwater utility and Fee.

The general objectives for the stormwater utility development and implementation work are:

- Review Existing and Recommend Future Stormwater Management Program to be funded by the Stormwater Utility
- Develop Public Information/Education
- Review and Recommend Organization and Staffing
- Develop a Rate Structure for a Stormwater Utility Fee Program
- Develop a Credit Policy
- Develop an Implementation Policy and Procedure
- Develop an Appeals Process
- Develop a Stormwater Utility Ordinance to Implement the Above Programs
- Provide Reports detailing above project components

See the attached scope of work for additional details.

The proposal must contain a defined study approach and specifically address the major components of the work described in the attached outline. Additional suggestions to enhance the study are welcomed. However, these should be clearly defined as additional suggested work in the proposal. The submittal must include a time schedule. The proposals shall be limited to twenty pages, not including additional attachments needed to present one page resumes of project team members, project schedule, and firm's hourly rates schedule.

If your firm is interested in this work, please submit a proposal outlining the following:

- Previous experience and examples of similar projects giving the name of the client and a brief description of the project, dates, special features, costs, etc.
- Client list of similar projects with contact person, addresses, and telephone number.
- Staff team to be assigned to this project along with any sub-consultants, which may assist in the study. A brief one-page resume of each team member may be included as attachments.
- A list of projects and dates of any direct consultant/engineering work done with the City during the past 24 months.
- Provide the amounts of professional liability insurance and general liability insurance carried by the firm/ members of the project team.

The following evaluation criteria will be used in the selection process but are not to be considered all inclusive.

- 1- Experience in stormwater utility formation and implementation through an enterprise fund.
- 2- Firm's expertise:
 - Key staff, promotional and public relations staffing, planning and GIS expertise.
 - References from clients.
 - Statistical analysis and legal expertise.
- 3- Availability of key performers.
- 4- Firm's familiarity with the current municipal stormwater programs and components.
- 5- Consultant's reputation for timeliness.

After review of the proposals, a firm will be selected with at least one alternate firm. It is anticipated the recommended firms will be submitted to the City Council at the November 6, 2018 meeting. This time frame requires **your proposals to be submitted no later than 3:00 p.m. on October 18, 2018** so staff reviews can be completed and a recommendation transmitted to the City Manager for City Council concurrence. Contract negotiations will begin after Council approval of the selected firm.

Please submit 3 bound copies of the proposal, with one loose-leaf copy.

Request for Proposals

City of Monmouth, Oregon

Stormwater Utility and Fee

The City of Monmouth is requesting proposals from qualified firms to provide professional services for the development and implementation of a stormwater utility and Fee. The general objectives for the stormwater utility development and implementation work are:

- Review Existing and Recommend Future Stormwater Management Program to be funded by the Stormwater Utility
- Develop Public Information/Education
- Review and Recommend Organization and Staffing
- Develop a Rate Structure for a Stormwater Utility Fee Program
- Develop a Credit Policy
- Develop an Implementation Policy and Procedure
- Develop an Appeals Process
- Develop a Stormwater Utility Ordinance to Implement the Above Programs
- Provide Reports detailing above project components

Proposal packages are due to the City of Monmouth; Attn: Russell Cooper, Public Works Director; 151 Main St. W.; Monmouth, Oregon 97361 no later than 3:00 p.m. local time on Thursday, October 18, 2018.

Proposals received after the 3:00 pm deadline will not be considered and will be returned unopened to proposer(s).

The Request for Proposal Documents may be examined at www.ci.monmouth.or.us

For additional information regarding this Request for Proposals, please contact Russell Cooper Public Works Director at 503- 838-2173 or by email at rcooper@ci.monmouth.or.us.

The City of Monmouth reserves the right to reject any and all proposals, and terminate the selection process at any time if, at its sole discretion, it determines it to be in the best interest of the City.

Dated this 24th Day of September, 2018

1. Administrative Information

1.1 Proposal Submission

Proposal packages are due to the City of Monmouth no later than 3:00 p.m. local time on Thursday, October 18, 2018. Submit one original proposal plus three (3) copies.

You must submit a copy of your current insurance certificate, as insurance is required for award of contract.

Your proposal must be sent to the following address:

City of Monmouth
Attn: Russell Cooper, Public Works Director
151 Main St. W.
Monmouth, Oregon 97361

Late proposals will be returned unopened.

Proposals submitted will be evaluated by City Staff. During the evaluation process, the committee and the City of Monmouth reserve the right, where it may serve the City of Monmouth's best interest, to request additional information or clarification from firms submitting proposals. At the discretion of the City of Monmouth, firms submitting a proposal may be requested to make oral presentations as part of the evaluation process. The City of Monmouth reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. By submitting a proposal the firm is providing a guarantee to the City that, if chosen, they will be able to provide the proposed products and services during the period of time discussed in the RFQ. There is no expressed or implied obligation of the City of Monmouth to reimburse firms for any expenses incurred in preparing proposals in response to this request, or any expenses incurred by the firm in providing a demonstration of their product in a place determined by the City of Monmouth.

The City reserves the right to reject any or all proposals for any reason and then seek new proposals or take other action.

1.2 Questions Concerning RFQ or Proposal Preparation- Consultants may submit questions concerning this RFQ or proposal preparation directly to Russell Cooper, Public Works Director, City of Monmouth, 151 Main St. W., Monmouth, OR 97361, or E-Mail: rcooper@ci.monmouth.or.us. The deadline to submit questions is 3:00 p.m. local time Tuesday, October 15, 2018.

1.3 RFQ Amendments- If it becomes evident that this RFQ must be amended, the City of Monmouth will issue a formal written amendment to all consultants who have provided appropriate address information and indicated that they will be submitting a proposal.

1.4 Proposal Format and Content- So that all proposals can be compared equally, consultants must assemble their proposal in strict adherence to the layout requirements. The proposal must be assembled in the following order, presented in a manner clearly identifying each section by name.

- > **Executive Summary** - The executive summary should contain a capsulated overview of the proposal.
- > **Project Overview and Approach** - Provide a narrative describing the project based on your understanding of the RFQ scope of work. Provide a detailed approach to the project based on your project overview narrative. Include in the approach project tasks and expected duration.
- > **Existing and Future Program Review** - Describe the ability of the firm to provide the deliverables (A & B) listed in item 2.1 - *Existing and Future Program Review*.
- > **Public Information/Education/Deliverables** - Describe the ability of the firm to provide the deliverables listed in item 2.2 - *Public Information/ Education/ Deliverables*.
- > **Organization and Staffing** - Describe the ability of the firm to provide the deliverables listed in item 2.3 - *Organization and Staffing*.
- > **Rate Structure** - Describe the ability of the firm to provide the deliverables listed in item 2.4-*Rate Structure*.
- > **Credit Policy Options** - Describe the ability of the firm to provide the deliverables listed in item 2.5 - *Credit Policy Options*.
- > **Implementation Policy and Procedure** - Describe the ability of the firm to provide the deliverables listed in item 2.6 - *Implementation Policy and Procedure*.
- > **Appeals Process** - Describe the ability of the firm to provide the deliverables listed in item 2.7 - *Appeals Process*.
- > **Stormwater Ordinance** - Describe the ability of the firm to provide the deliverables listed in item 2.8- *Stormwater Ordinance*.
- > **Schedule/Incentive/Penalties** - Describe the ability of the firm to provide the deliverables listed in item 2.9- *Schedule/ Incentive/ Penalties*.
- > **Reports** - Describe the ability of the firm to provide the deliverables listed in item 2.10-*Reports*.
- > **Client References** - The Consultant must provide a list of all clients that have been provided products/services related to the formulation of a stormwater utility during the past three years. In addition, if your company has had project experience with the City of Monmouth in the past 24 months, provide information regarding the experience in addition to the requested client reference information. Client references will be contacted randomly.

Please provide the following information for each client: Client name, mailing address, contact name, contact telephone number and e-mail address.

Services provided to the client (e.g. engineering services, data conversion, training, and implementation). Include a brief description of the project, dates, special features, costs, etc.

- > **Staffing/Work Product** - The Consultant must provide a listing of the staff team and project manager that will be assigned to this project along with any subconsultants that may assist with the effort. A brief one-page resume of each team member may be included as attachments. The percent of the project to be performed in the firm's local office and the percent of subcontract work that is anticipated should also be included in this section. Indicate the percentage of work to be performed by each team member and their availability for this project.
- > **Time Schedule** - Include a time schedule for all deliverables.

1.5 Proposal Evaluation

The following evaluation criteria will be used in the selection process but are not to be considered all-inclusive.

- > **Experience** in stormwater utility formation and implementation through an enterprise fund: Stormwater utility formations in which your firm has participated.
- > **Firm's expertise:** Key staff, promotional and public relations staffing, planning and GIS expertise. References from clients.
- > **Availability** of key performers
- > **Consultant's responsiveness** to request for proposals, including organization, responsibilities, key issues and focus
- > **Firm's familiarity** with current municipal stormwater programs and components
- > **Consultant's reputation** for timeliness and adherence to proposed schedules

2 Scope of Work - Stormwater Utility RFQ

2.1- Existing and Future Program Review: Analysis of the City's current stormwater management practices and plans must be conducted to determine the current level of service and its cost. Recommendations and costs regarding improvements to the level of service shall be developed. The consultant shall meet and/or interview appropriate staff members to identify and describe programs and services provided by each of the functional elements of the City's stormwater management program. The consultant will have a workshop with the City Council to discuss priorities for different stormwater programs and budget targets. Annual budget estimates for all these services, and recommended improvements to services shall be developed for the utility implementation plan. The plan shall include estimates of expenditures for the next five years. These estimates shall be a lump sum allocation to the capital budget or debt service for our five-year budget. In addition, the consultant will need to review the City's stormwater system maintenance plan and five year Capital Improvement Program.

The consultant shall develop:

- A. A detailed outline for a Stormwater Management Plan, including a schedule and cost to develop the plan.
- B. A detailed outline for a Stormwater System Improvement Plan, which will identify improvements and costs necessary to repair or enhance the stormwater system, including a schedule and cost to develop the plan. The improvement plan will be developed from water quality requirements at the State and federal levels, the City's Willamette TMDL Program matrix, and interviews with Public Works staff regarding historical stormwater collection system deficiencies.
- C. The consultant will be required to prepare criteria for evaluating competing stormwater improvement projects. Criteria shall include evaluation of projects related to flooding, erosion, and water quality. The criteria shall include evaluations between different topics such as water quality and flood control.

2.2- Public Information/Education/Deliverables

The consultant shall identify activities to be used to support and promote stormwater program development, policies, and financial plan. This may include brochures, pamphlets, social media and/or public presentations for community meetings and workshops. The consultant shall, at the City's option, participate in up to ten (10) presentations to City staff, elected officials, and/or general public interest groups.

2.3- Organization and Staffing

The consultant shall assess the impacts of the stormwater utility on the City's current organization, management, and staffing. Organization and staffing needs shall be identified based on both this assessment and the stormwater utility program and funding strategy that is recommended for implementation.

2.4- Rate Structure

The consultant, with the cooperation of the City, will identify and summarize a rate structure for consideration by the City Council. The goal is to develop a fair and equitable equation to allocate stormwater management costs that is legally defensible. A statistically valid study and measurement of impervious surface area of single family residential properties will be completed by the Consultant. The Consultant will also measure smaller samples of various other types of properties. This information will be provided by the consultant for use in determining proposed rate structures, equivalent residential unit (ERU) calculations, and a total revenue base. This study will also include an analysis of projected revenues against the estimated costs developed in the stormwater management plan.

It is anticipated that a multi-tiered residential rate may be used. The consultant shall provide a recommendation for the definition of single family residential unit as used for stormwater billing purposes. It is also anticipated that an ERU or charge per square foot of impervious surface area will be developed for use with commercial, multi-family residential, industrial, and institutional properties. The Consultant will be required to measure the amount of impervious surface on all commercial, industrial and institutional properties. The Consultant shall provide recommendations for the ongoing update of impervious surface data, both policies and procedures.

As part of this proposal, provide details on your proposed methodology for completing the study to determine rate structures and revenue estimates.

2.5- Credit Policy Options

Evaluate the impact of a credit system on the projected revenue potential of the stormwater utility. Develop policies and criteria for granting credits that will be legally defensible. At a minimum, the policies shall review if a credit should be granted to a private property owner who provides an existing stormwater management facility that benefits the service area in ways similar, in whole or in part, to the City stormwater programs and activities. Review shall consider the length of time that a credit is granted, and the frequency that the credit should be evaluated and conditions that should be attached to the credited facilities (e.g. maintenance, inspection reports, etc.).

Analyze if federal, state, city/county, holders of utility easements or other tax-exempt land or undeveloped property should be exempted from the utility fee or provided credits. Recommend other situations that may be eligible for a credit. The City wants a specific policy with defined criteria that will manage a credit policy effectively with minimum administrative effort and modifications to the City's billing system. This task shall conclude with a mechanism for deciding which of the credit policy options is most desirable before proceeding with the remaining tasks.

2.6- Implementation Policy and Procedure

The consultant will develop a program implementation plan that outlines the steps needed to implement the recommended financing plan and estimate the start-up costs. The consultant shall provide recommended policies, procedures and draft ordinances for the administration of the stormwater financing system and capital recovery fee programs. The consultant will make every effort to evaluate the most appropriate accepted procedures to identify revenues and charges related to stormwater management. Develop policies and evaluate impacts on how delinquent payments will be managed and enforced.

2.7- Appeals Procedure

The consultant shall provide options for an appeals procedure that is legally defensible. The appeals procedure from at least five existing stormwater utilities shall be provided to City staff. After discussions with and direction from City staff, the consultant shall provide a draft appeals procedure and incorporate two sets of revisions based on City staff comment.

2.8- Stormwater Ordinance:

The consultant shall provide a draft of the ordinance(s) that addresses the creation and implementation of a stormwater utility. The draft ordinance(s) shall be developed with close coordination of the City's legal staff. The consultant shall revise the ordinance a maximum of three times due to City staff comments.

2.9- Schedule

The consultant will develop a draft schedule with milestones for project completion that includes the City's process for public hearings and ordinance adoption. The consultant will be responsible for maintaining that schedule. **It is the City's desire to have final products delivered by February 8, 2019.**

2.10 - Reports

Prior to submission to City Council for approval, the consultant shall submit twenty five copies of a report that includes all work items. and one electronic pdf. copy. The consultant will provide an executive summary of the stormwater utility evaluation, separate from the overall project report. Fifty copies and electronic pdf. copy, of the executive summary shall be supplied by the consultant for distribution by the City. Costs for this deliverable shall be included in the proposal.