

July 15, 2016

REQUEST FOR STATEMENT OF QUALIFICATIONS

Deadline for Statement of Qualifications is August 5, 2016

The Association of Bay Area Governments (ABAG)/San Francisco Estuary Partnership (SFEP) invite you to submit a Statement of Qualifications (SOQs) and other materials for pesticide communication and evaluation services. Attachment #1 details the scope of services, Attachment #2 details insurance requirements.

I. Background

ABAG is the official comprehensive planning agency for the San Francisco Bay Area. ABAG's mission is to strengthen cooperation and coordination among local governments. In doing so, ABAG addresses social, environmental, and economic issues that transcend local borders.

SFEP, a program of ABAG, was created in 1987 under the Clean Water Act's National Estuary Program. It is a cooperative effort to promote effective management of the Bay-Delta Estuary and to restore and maintain its water quality and natural resources. Representatives from the public, all levels of government, and elected officials from all twelve Bay-Delta counties are working together to implement SFEP's Comprehensive Conservation and Management Plan. The plan recommends specific corrective actions, monitoring programs, and research goals aimed at resolving the Estuary's most critical problems.

The goal of this RFQ is to implement a coordinated communications and evaluation strategy, and to identify best practices and lessons learned from linking advertising and evaluation for pesticide use and consumer behavior change.

II. Services Required

The Contractor shall perform all aspects of the required work as described in the attached Scope of Services (Attachment #1).

III. Time Frame

This will be a 9-month contract. Starting date is projected to be September 15, 2016 and all project deliverables are expected to be complete by May 30, 2017. Refer to attached Scope of Services (Attachment #1) for detailed elements.

IV. Compensation

Up to \$90,050 is available through this contract for the project for completion of the work listed in Attachment #1: Scope of Services. Contractor must be a bona-fide independent Contractor. Contractor is responsible for payment of applicable state and federal taxes. Contractor must provide the necessary office space and equipment to perform work. Services will be paid for on either an hourly basis with other direct costs to be billed on an as expended basis or on the

basis of completion of tasks. All payments will be in arrears. Payments for grant funded projects are contingent upon approval by, and receipt of funds from, the grantor.

V. Selection Procedure

Every Statement of Qualifications (SOQ) will be evaluated according to the criteria below. A selection committee will evaluate all submitted proposals. Numerical scores will be tabulated for each offer. The highest score may not necessarily be awarded the contract, for there are considerations listed below which do not receive a numerical rating and are an essential part of the determination of overall acceptability. The applicant must possess specific, substantive, and demonstrated experience to address the Scope of Services (Attachment #1).

1. Qualifications and Experience - The Contractor will be evaluated based on the level of experience and background in performance of similar projects/programs, including past schedule and budget performance. This includes any special experience with behavior change communication, locally relevant communication efforts, evaluation, pesticides, or an ability to leverage existing collaborative efforts for the purposes of this SOQ.
2. Proposal - The Contractor will be evaluated based on the adequacy of the submitted approach to fulfill the goals and objectives of the SOQ.
3. Results of Reference Checks
4. Other Factors - Other factors that may strike the reviewer as relevant.

Highest ranking candidates may be invited to an interview at the San Francisco Estuary Partnership offices, 1515 Clay Street, Suite 1400, Oakland, CA, at their own expense.

VI. Contract Award

Contract award shall be made to the responsible Contractor on the basis of the evaluation criteria listed above and whose statement is most advantageous to ABAG/SFEP. Our objective is to obtain the highest qualified Contractor to achieve the objectives within a realistic time frame and reasonable cost. Qualifications and experience as a whole are more important than cost.

This request does not commit ABAG/SFEP to award a contract. We reserve the right to reject any or all SOQs received in response to this request. Award of contract may not be made to any Contractor unless an agreement can be secured for all general and special contract provisions. Award will not be made to a Contractor whose proposed period of performance is not within a period of time acceptable to ABAG/SFEP. Applicants are informed that the award of any contract as the result of this solicitation is contingent upon the availability of funds.

VII. Rights in Data

The Contractor shall have the right to disclose, disseminate and use, in whole or in part, any final form data and information received, collected and/or developed under this contract, subject to inclusion of appropriate credit to the appropriate party.

ABAG/SFEP shall have the right to reproduce, publish, and use all data, papers, reports, charts and other documents or any part thereof in any manner for any purposes whatsoever and to authorize others to do so.

VIII. What to Submit

To provide an objective, fair review of candidate submittals, statements are to include only the following information.

1. **Transmittal Letter** - Normal transmittal letter, covering highlights and unique features of your proposal. Any special terms and conditions of the offer should also be summarized in this portion of the proposal. Letter should include the name, email address and telephone number of a contract person and your office address. Length: **One (1) page maximum.**
2. **Statement of Qualifications** - Provide a definitive statement to respond to the requirements as stated as stated in Attachment #1: Scope of Services. This must describe the procedures and methods that will be used to achieve the stated goals of the project, preferably drawing on past experiences and work conducted by the applicant. An essential component of an acceptable evaluation strategy will be clear approaches to measure behavior change outcomes as a result of the campaign. A proposed timeline and clear delineation of general tasks, products, and expected completion dates must also be included. Length: **Four (4) pages maximum.**
3. **Relevant Experiences** - Provide a summary of relevant qualifications and experience over the last 5 years. Length: **Two (2) page maximum.**
4. **Educational and Professional Background** – Identification of principal(s) and any subcontractors, including key personnel and lead persons to be assigned to the project. Provide a summary of education background, including degrees. Also include special professional experience including former work with ABAG/SFEP or partners. Length: **Three (3) pages maximum.**
5. **List of Client References** - Provide a list of clients to be used as references for your work, including contact name, address, telephone number, nature of job, length of engagement, amount (e.g. 1 year, \$ 35,000). Length: **One (1) page maximum.**
6. **Budget** - Must include total funds requested and amount budgeted for various tasks for one year budget period. Provide hourly billing rate, including overhead. Length: **One (1) page maximum.**
7. **Examples of Work (optional):** Provide one or two documents or articles that clearly demonstrate your ability to communicate in non-technical language to a general audience, and/or to evaluate behavior change communications efforts. Length: **Optional, but brevity is appreciated**

VIIV. Where to Submit Application

We require an electronic copy of your proposal package. Proposal should be sent electronically to heidi.nutters@sfestuary.org by the close of business, 5:00 P.M on August 5, 2016. Questions may be directed to Heidi Nutters, Environmental Planner, at heidi.nutters@sfestuary.org.

ATTACHMENT #1 SCOPE OF SERVICES

Background

The Greener Pesticides for Cleaner Waterways (GPCW) project addresses San Francisco Bay Area water bodies impaired for pesticide toxicity through outreach and education to residential home and garden pesticide users. This project implements the public outreach strategy from the Diazinon and Pesticide-Related Toxicity in Urban Creeks TMDL adopted for all urban creeks in the S.F. Bay Region. Education and outreach performed under this project will align with the TMDL's implementation plan: "Education and outreach programs will focus on decreasing demand for pesticides that threaten water quality, while increasing awareness of alternatives that pose less risk to water quality" (Basin Plan Amendment, p. 4-5). The GPCW project will execute TMDL Implementation Actions to "Undertake targeted outreach programs to encourage communities within a discharger's jurisdiction to reduce their reliance on pesticides that threaten water quality" (p. 11).

The project has been ongoing since 2012. During initial phases of the project, we focused on boosting Our Water Our World (OWOW) presence in retail stores with in-person outreach through the IPM Advocates and through updated materials, and conducting additional advertising to support the program's goals.

The tasks in this RFQ will focus on developing and implementing a coordinated communications and evaluation strategy designed to improve best practices for behavior change communication. A final report will be developed that summarizes communication outputs, evaluation methodology, and lessons learned from the project.

Scope of Services

Task 1: Project Management and Administration

The Contractor will communicate regularly with SFEP on the progress of the work, through timely discussions with the project manager or regular check-ins as scheduled. Quarterly reports showing progress to date on the project and quarterly invoices will also be required.

Task 2: Establish a coordinated advertising and evaluation strategy

The Contractor will develop an advertising and evaluation strategy to encourage use of less toxic pesticides by residential consumers. The evaluation strategy will focus on identifying and improving best practices for communication methods that achieve measurable behavior change. It will integrate emerging communication media and approaches (such as social media, community based social marketing, social and behavior change communication) into a plan for development of materials, implementation, and evaluation. The complete strategy will include clear objectives, intended audiences, evaluation metrics and timeline for completion.

The strategy and implementation may incorporate a pilot project to be implemented in Marin in collaboration with the County of Marin's Pesticide Reduction Outreach Campaign and the Marin

County Stormwater Pollution Prevention Program (MCSTOPPP). This project includes target audience (e.g. multi-unit residential building managers, non-OWOW stores that sell pesticides, professional landscapers, or home owners) may be identified with input from the selected Contractor.

Task 3: Develop advertising content for multiple communication media

The Contractor will develop a suite of materials to implement the advertising and evaluation strategy. As listed in the above task, this should focus on emerging communication media and approaches. All materials will undergo a review process by SFEP staff and will be tailored to agreed-upon audience, goals and objectives. Materials might include, but are not limited to, social media content, bus banners, flyers, or other materials. Materials will take into account existing local, regional and state pesticide reduction program branding, such as OWOW. Materials will be distributed in print, in person, and online in conjunction with an evaluation approach so that usage data can be collected and analyzed following implementation of advertising/outreach activities.

Task 4: Implement media strategy to intended audience and conduct data collection

The Contractor will implement the media strategy to intended audience. This will include close coordination with SFEP and partners, including potentially leveraging work from OWOW or other existing partnerships/collaborations if feasible. (OWOW link: <http://ourwaterourworld.org/>). The Contractor will collect relevant data to evaluate project outcomes, based on the media/outreach and evaluation strategy. Types of data collection might include: click-throughs and web visits, focus groups, surveys, media pitches, articles placed and coverage, events and attendees, or other data.

Task 5: Conduct project evaluation and final report

The Contractor will complete project evaluation and will develop a draft final report for review, and then a complete final report that synthesizes data collection, and measures success at achieving communication and behavior change outcomes. The report will also include analysis of data from earlier phases of the project that will be provided to the Contractor. Finally, it will include articulation of lessons learned during the course of the entire project.

ATTACHMENT #2 INSURANCE REQUIREMENTS

Insurance Requirements. Contractor shall maintain insurance as required by this contract to the fullest amount allowed by law and shall maintain insurance for a period of five (5) years following the completion of this project. Contractor shall provide a copy of section 21 of this contract and these insurance requirements to its insurance broker or insurer to confirm compliance. In the event Contractor fails to obtain or maintain completed operations coverage as required by this agreement, ABAG, at its sole discretion, may purchase the coverage required and the cost will be paid by Contractor. The limits of insurance required in hereunder may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of the Indemnitees (if agreed to in a written contract or agreement) before the any Indemnitee's own Insurance or self-insurance shall be called upon to protect it as a named insured.

(a) Minimum Scope of Insurance. Coverage shall be at least as broad as:

Insurance Services Office Commercial General Liability coverage (occurrence Form CG 0001).

Insurance Services Office Form Number CA 0001 covering Automobile Liability, Code 1 (any auto).

Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

Errors and Omissions Liability insurance appropriate to the Contractor's profession. Architects' and engineers' coverage is to be endorsed to include contractual liability.

(b) Minimum Limits of Insurance. Contractor shall maintain limits no less than:

General Liability: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.

Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.

Employer's Liability: \$1,000,000 per accident for bodily injury or disease.

Errors and Omissions Liability: \$1,000,000 per claim/aggregate.

(c) Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions must be declared to and approved by ABAG. The insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the Indemnitees; or the Contractor shall satisfy any such deductibles or self-insured retentions. In addition, policies containing any self-insured retention (SIR) provision shall provide or be endorsed to provide that the SIR may be satisfied by either the named Insured or any of the Indemnitees.

(d) Other Insurance Provisions. The commercial general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

(i) The Indemnitees are to be covered as additional insureds as respects: liability arising out of work or operations performed by or on behalf of Contractor; completed operations; or automobiles owned, leased, hired or borrowed by Contractor.

(ii) For any claims related to this project, the Contractor's insurance coverage shall be primary insurance as respects the Indemnitees.

(iii) Any insurance or self-insurance maintained by the Indemnitees shall be excess of Contractor's insurance and shall not contribute with it.

(iv) Except for General Liability and Automobile Liability, each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled by either party, except after thirty(30) days' prior written notice by certified mail, return receipt requested, has been given to ABAG. For General Liability and Automobile Liability, Contractor shall provide ABAG with thirty (30) day's prior notice of cancellation by either the insurer or Contractor.

(v) Coverage shall not extend to any defense or indemnity coverage for the active negligence of the Indemnitees in any case where an agreement to defend and indemnify the Indemnitees would be invalid under Subdivision (b) of Section 2782 of the Civil Code.

(e) Other Insurance Provisions – Workers Compensation. The Workers Compensation insurance shall be endorsed to waive subrogation against the Indemnitees.

(f) Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to ABAG.

(g) Verification of Coverage. Contractor shall furnish the ABAG with original certificates and amendatory endorsements effecting coverage required by this clause. All certificates and endorsements are to be received and approved by ABAG before work commences. ABAG reserves the right to require complete, certified copies of all required insurance policies, including endorsements effecting the coverage required by these specifications at any time.

