



Request for Proposals #RFP-SE

Contract Support for ITRC's State Engagement Program

March 1, 2010

Overview

The Interstate Technology and Regulatory Council (ITRC) is a public-private coalition working to reduce barriers to the use of innovative environmental technologies and approaches, so that compliance costs are reduced and clean up efficacy is maximized. ITRC produces documents and training that broaden and deepen technical knowledge and expedite quality regulatory decision-making, while protecting human health and the environment. With private and public sector members from all 50 states and the District of Columbia, ITRC truly provides a national perspective. More information on ITRC is available at www.itrcweb.org.

This Request for Proposals (RFP) is for multi-year contract support for ITRC's State Engagement Program (SEP). ITRC's State Engagement Program (SEP) began in 1998 to serve as ITRC's implementation arm within state environmental agencies (or their equivalent). The overall goal of the SEP is to work through state environmental agencies to foster good decision-making regarding the use of technically-sound, innovative environmental technologies and processes for better environmental protection. The core purpose of the SEP is to ensure that ITRC documents and training courses are available, understood, and used by staff at state environmental agencies. The SEP is executed by a network of Points of Contact (POCs) who are representatives from state environmental agencies (or equivalent) and who contribute 10% of their professional time to ITRC activities. States formalize their membership in ITRC by officially designating an ITRC POC. The POC network, along with the State Engagement Coordinator, who is a member of the ITRC Board of Advisors, and contract-based Program Advisor support compose the State Engagement Program. Additional background information on ITRC Technical Teams and the SEP, including work tasks, focus areas, goals, and metrics is given in Appendix A.

About ITRC, ERIS, and ECOS

ITRC is a program of the Environmental Research Institute of the States (ERIS). ERIS is a 501(c)(3) organization incorporated in the District of Columbia and managed by the Environmental Council of the States (ECOS). ECOS is the national, non-profit, non-partisan association representing the state and territorial environmental commissioners. Its mission is to service as a champion for states; to provide a clearinghouse of information for state environmental commissioners; to promote coordination in environmental management; and to articulate to Congress, federal agencies and the public state positions on environmental issues. ECOS will issue and administer contracts on behalf of ITRC.

Definitions

"Supplier" refers to the responder to the RFP and describes the person or organization seeking the contract. "Supplier" also refers to the person or organization providing the good or service in the proposal.

The words "must" and "shall" are used to designate a mandatory condition. Failure to address a mandatory condition shall result in disqualification of the proposal, and the proposal shall receive no further consideration.

The words "will", "should", or "would" are used to describe an advisory or permissible action, and do not represent a mandatory condition.

Administrative Information

This RFP is for a contract from the contract signing date (expected between April 15, 2010 and May 1, 2010) until December 31, 2010. The contract is renewable for work after December 31, 2010 for four additional years via a yearly ECOS Change Order at the request of ECOS and dependent on the availability of funding and SEP work plan and goals. The maximum performance period is from the contract signing date until December 31, 2014.

There will be no pre-submittal conferences.

Suppliers or key persons must not be subcontractors. Proposals shall not include the use of subcontractors.

One electronic copy of the proposal must be received by ITRC by 5 pm Eastern time, Monday, March 22, 2010. Late proposals will not be accepted or evaluated. Proposals must be emailed to: awillett@sso.org. Receipt will be acknowledged by return email promptly after proposal receipt, but no later than 24 hours after receipt of proposal. Suppliers must contact ITRC if supplier does not receive written (email) response from ITRC indicating proposal receipt. Problems with email submittal can be addressed at any time to Anna Willett, ITRC Director at office phone (202) 624-3686 or cell phone (646) 761-9069.

The proposal must be received as one file in Microsoft Word format or Portable Document Format (pdf). File size must be 5 MB or less. Proposals shall be submitted in a format that is printable on a standard black and white laser printer in standard letter-sized paper. A visually presentable proposal is expected. However, proposals will not be evaluated on the basis of aesthetic embellishments.

Select suppliers may be contacted to schedule an approximately 1 hour phone interview between key person(s) and ITRC leadership at a mutually convenient time. Interviews would be scheduled during the week of April 5, 2010. Proposers should indicate in their proposal if their key person(s) are not available for an interview this week.

Selection will be completed by April 9, 2010, and a contract will be offered during the week of April 12, 2010. All Suppliers will be notified by email of the result of the selection process after May 1, 2010.

All requests, questions, or other communications about this RFP must be made in writing and submitted by email to Anna Willett, ITRC Director, awillett@sso.org. A response will be provided promptly and no later than 24 hours after receipt of inquiry. Communications made to other ITRC or ECOS personnel or associates are not allowed or recognized and may disqualify the proposal. Inquiries and questions will be received and answered up to the proposal deadline.

By submitting a proposal in response to this RFP, Supplier waives any and all claims against ITRC, ERIS, and ECOS, including its officers, directors, employees, subcontractors, and agents, and assumes full responsibility for all damages, claims, losses, costs, and expenses which Supplier may incur arising from or relating to its proposal, including any errors or omissions in the proposal.

Supplier acknowledges that submission of a proposal in response to this RFP, does not create a contract between the Supplier and ITRC, ERIS, and/or ECOS.

Disadvantaged, women-owned, and minority-owned Suppliers are encouraged to apply.

Any false or misleading statements found in the proposal will be grounds for disqualification or contract nullification, if awarded.

Proposal Requirements

Proposals that do not meet the following requirements (including page lengths and word counts where indicated) shall not be evaluated. Addendum in or to the proposal other than the requirements listed here shall not be considered during the evaluation, and their inclusion may disqualify the proposal from evaluation.

Cover Letter/Key Personnel

One page cover letter on Supplier letterhead indicating the Supplier's acceptance of the terms of the RFP and commitment to the contract, if awarded. The names and contact information of up to two key persons who shall provide the services for the extent of the contract must be listed. Providing a second key person is optional, and owners of sole proprietor organizations are encouraged to apply as the key person. Suppliers or key person(s) cannot be subcontractors.

Narrative

Four page narrative outlining how the capabilities of the Supplier will allow ITRC's State Engagement Program (SEP) to achieve its mission with excellence. The narrative must address the items listed in the Required Tasks and Competencies section and must connect Supplier and key person(s) skills and experience back to the Required Tasks and Competencies. The narrative must show that the Supplier and key person(s) understand ITRC as an organization.

Resume(s)

Resumes (up to 2 pages in length) of key person(s) who shall provide the services for the extent of the contract (e.g. two pages total for one key person or four pages total for two key person(s)). Resumes should be customized to indicate how the experience and skills of the key person(s) will allow ITRC's State Engagement Program (SEP) to achieve its mission with excellence and should focus on the items listed in the Required Tasks and Competencies section.

Pricing

A one page price statement that includes a fixed price amount for work to be completed for a **one calendar year** (January 1 – December 31) period of performance and according to the work scope listed in the Required Tasks and Competencies section. The proposed fixed price amount must not be greater than the ceiling amount given in the Pricing Information section. Suppliers should indicate the approximate number of hours for the proposed key person(s) that is included in the fixed price. **The actual contract amount for 2010 will be pro-rated on a time basis from the contract signing date to December 31, 2010 and according to the remaining work tasks to be completed in 2010.**

Supplier Information

1. Full legal name of the company and corporate address
2. Year the business started
3. State of incorporation or headquarters
4. Are you a United States corporation?
5. Are you a public or private corporation?
6. Tax identification number
7. Is your firm subject to any litigation, judgment, debarment, or suspension that would prohibit it from fulfilling the terms of the contract?
8. Are you a disadvantaged, women-owned, or minority-owned firm?
9. Current number of people employed
10. The names, addresses, and telephone numbers of two references who are familiar with the work of the key person(s) and your business

Pricing Information – Yearly Basis

The fixed price ceiling for a one calendar year (January 1 – December 31) period of performance is \$120,000.

The fixed price proposed for the work for one calendar year shall include all labor, materials, overhead, and travel costs for the Supplier's key person(s) indicated for the work. On a pre-approval basis, ITRC will provide the following items, which should not be included in the proposed fixed price:

- ITRC provides website and general outreach and marketing support
- ITRC provides meeting facilities, catering, and state POC travel reimbursement according to the ITRC travel policy (note: Supplier travel costs for the ITRC meetings indicated in the Pricing Information section should be included in the proposed fixed price)
- ITRC Technical Teams provide documents and training courses
- ITRC provides State Engagement conference call services, printing of in-person meeting materials and advertising/marketing materials and other such items directly related to the SEP

The time requirement for contract support for the State Engagement Program (SEP) is approximately 2/3 of a full time person per year (e.g. 1333 hours), but time requirements vary from week to week. The time requirements and SEP information are provided for example only; project content, scope, and schedule may change as the SEP plans its work each year. Additional information on yearly time requirements is detailed in the Required Tasks and Competencies section.

Yearly meeting attendance (2-3 days plus travel time) is described in the Required Tasks and Competencies section and includes the ITRC Kick-Off Meeting, ITRC Spring Meeting, and ITRC Fall Meeting. Note that for the 2010 contract period, attendance at only the 2010 Fall Meeting October 25-29, 2010 in St. Louis, MO is required. However, the fixed price proposal should be for contract support for one calendar year and should include travel to and attendance at all three meetings.

Required Tasks and Competencies

The objective of this procurement is to obtain project and personnel management services to support ITRC's State Engagement Program (SEP). Background information on ITRC Technical Teams and the SEP, including work tasks, focus areas, goals, and metrics is given in Appendix A.

- A. Supplier must provide support for the State Engagement Coordinator (SEC) and ITRC leadership, such as SEP administrative, communications, and meeting planning support, as well as assisting ITRC leadership with achieving ITRC buy-in at multiple levels of state environmental agency management. Specific required tasks are:
- Maintain an active POC network with a goal of having active POCs from all US states and appropriate territories; Includes communications to retain POCs during ITRC's annual membership process (membership process facilitated by ITRC), transition support for POCs, activation of inactive POCs, and recruitment of POCs from non-member states. Typically, each year, 8-12 new POCs transition into the POC role in states that are already ITRC members.
 - Help identify organizational issues and SEP procedural issues that may impact the work of the POCs; Includes evaluation of current procedures (e.g. mechanism for gathering state environmental priorities), recommendations for changes, and communication to SEC and ITRC leadership.
 - Assist the ITRC leadership with preparations for their semi-annual meeting with Environmental Council of the States (ECOS) commissioners (e.g. state environmental agency leaders) at the ECOS spring and fall meetings; For more information on ECOS, please see www.ecos.org. Includes development of success story material for presentations and compilation of state-by-state information relevant for communications with state environmental agency leaders.
 - Track, and provide upon request, quarterly information of State Engagement activities, schedule changes, and the impacts of those changes to the SEC and ITRC leadership; Includes reporting out on SEP performance metrics as requested (see Appendix A for examples of metrics).
- B. Supplier must provide support for ITRC state POCs to ensure that POCs complete SEP work tasks on schedule and with excellence (see Appendix A for POC work tasks). Specific required tasks for Supplier are:
- Design and facilitate one to two day POC meetings at the ITRC Spring Meeting and the ITRC Fall Meeting (ITRC meeting organization, venue arrangements, and state POC travel costs are the responsibility of ITRC); Supplier should facilitate integration of POCs into the full ITRC meeting as directed by the SEC (e.g. Technical Sessions given by ITRC

Technical Teams); Supplier shall attend portions of the ITRC Spring and Fall Meetings that are relevant to the SEP (2-3 days each).

- Develop agendas, coordinate, and document monthly POC calls including interface with the SEC, ITRC leadership, and ITRC Technical Teams. Calls should include identification of upcoming SEP work tasks and sharing of successes and progress.
- Provide regular communications (e.g., monthly e-mail announcements) to POCs to provide ITRC and SEP information, as well as for planning SEP work tasks.
- Facilitate and assist POCs with developing and implementing a plan for completing yearly SEP work tasks; Includes coaching/mentoring and providing POCs with project management tools and training on project management tools to help manage their workload; Software and other tools will be provided by ITRC.
- Facilitate integration of POC activities within the larger ITRC organization; Includes coordination of SEP work tasks with ITRC Technical Team product development schedules (by reviewing monthly ITRC Technical Team project work plans) to ensure timely state reviews and a balanced workload for POCs; Includes working with ITRC Technical Team Leaders, POCs, and ITRC communications/web support; Supplier must attend the ITRC Kick-Off Meeting held each year in late January or early February to organize ITRC work for the year (meeting is 2-3 days long).
- Coach and assist POCs with authoring or contributing to new ITRC project proposals (e.g. for new Technical Teams); Includes providing communication among POCs and with federal and private sector funders.
- Provide a mechanism for POCs to submit state environmental priorities and compile, analyze, and report out on results to the SEC and ITRC leadership.
- Provide mechanism for POCs to provide input on ITRC project proposals under review and compile, analyze, and report out on results to the SEC and ITRC leadership.
- Facilitate getting POC's to identify success stories; Document and track POC identified success stories
- Manage and maintain the SEP webpage on the ITRC website (ITRC website maintained by ITRC), including organization of files in SEP's "file cabinet" and "landing page" (no web design or writing of code is required).

C. Other required competences

- Supplier must have skills, competencies, and experience related to the Required Tasks and Competencies
- Supplier must have experience in managing teams of people.
- Supplier must have familiarity with environmental regulatory issues.
- Supplier must show project management experience, including budgeting, planning, tracking, and updating project status.
- Supplier must show ability to plan, convene and facilitate meetings (meeting facilities are procured through ITRC, but the Supplier is expected to plan, attend, and facilitate the SEP portion of the meeting).
- Supplier must show ability to write reports and develop presentations.

- Supplier must have business office administrative capabilities like photocopying, facsimile communications, high speed internet access, email, postage/mail handling, cellular phone services, and telephone/web conferencing.
- Supplier must provide its own work facilities and materials. ITRC will not provide workspace or supplies for Suppliers.
- Supplier must be proficient in computer software such as Microsoft Office, Adobe, survey tools (e.g. SurveyMonkey), and web conferencing applications (e.g. Glance).
- Supplier should be accessible during normal working hours and be responsive to telephone and e-mail messages.

Evaluation Criteria

ECOS/ITRC reserves the right to award the contract at its sole discretion and based on any factors it chooses to consider. Suppliers (and their key person(s) proposed) will be evaluated on how likely they are to complete the Required Tasks and Competencies on schedule and with excellence, as well as on total price. Select proposers may be contacted to schedule an approximately 1 hour phone interview between key person(s) and ITRC leadership at a mutually convenient time. Competitiveness of price will be considered, but low cost is not essential to be awarded the contract. Proposals and other information on Suppliers will be shared with ECOS staff and ITRC Board of Advisors members only.

Appendix A: Background Information on ITRC Technical Teams and State Engagement Program

ITRC Technical Teams

ITRC achieves its mission through the work of its Technical Teams, which are composed of state and federal environmental regulators, federal agency representatives, industry experts, public/tribal stakeholders, and academics from across the nation. ITRC Technical Teams are formed to address projects on innovative environmental technologies and processes, as well as related to specific environmental contaminants. ITRC Technical Teams complete two to four year projects, such as conducting surveys of environmental professionals, writing overview and technical regulatory guidance documents, creating training curricula, and instructing environmental professionals on technical topics. ITRC has published 90 documents and trained 62,000 participants through training courses on 44 topics. ITRC guidance documents and internet-based training are offered for free.

ITRC State Engagement Program

ITRC's State Engagement Program (SEP) began in 1998 to serve as ITRC's implementation arm within state environmental agencies. The overall goal of the SEP is to work through state environmental agencies to foster good decision-making regarding the use of technically-sound, innovative environmental technologies and processes for better environmental protection. The core purpose of the SEP is to ensure that ITRC documents and training courses are available, understood, and used by staff at state environmental agencies. The vision and mission of the SEP are:

Vision of the State Engagement Program

The vision of the ITRC State Engagement Program is for each ITRC member's state agency and their statewide environmental community to view ITRC as a primary source for information to break down barriers to the acceptance and use of technically sound and innovative solutions to environmental challenges.

Mission of the State Engagement Program

The mission of the ITRC State Engagement Program is to facilitate the implementation of ITRC tools and resources and build the acceptance of ITRC as the "go to" environmental solution provider for states. A State Engagement Program focused on implementation will demonstrate ITRC value in states.

The SEP is executed by a network of Points of Contact (POCs) who are representatives from state environmental agencies (or equivalent) and who contribute 10% of their professional time to ITRC activities. States formalize their membership in ITRC by officially designating an ITRC POC. The POC network, along with the State Engagement Coordinator, who is a member of the ITRC Board of Advisors, and contract-based Program Advisor support compose the State Engagement Program. ITRC POCs form a national network of state environmental professionals, whose collective expertise, resources and influence exceed that which is available within any single state agency. POCs are an integral part of ITRC as they serve as ambassadors for ITRC in their environmental agency (or equivalent) and the broader environmental community in their states. POCs lead their state's participation in ITRC and ensure a two-way communication between their state and ITRC.

ITRC state Points of Contact (POC) Work Tasks

- Establish a network within state environmental agency or equivalent to promote ITRC resources and increase response to ITRC information requests (e.g. surveys, document reviews).
- Raise awareness about ITRC resources within states; identify and communicate ways to showcase ITRC products and resources within states.
- Identify experts within state environmental agencies who can review ITRC documents, respond to ITRC surveys, and participate in ITRC training dry runs; coordinate state ITRC document reviews, survey responses, and training dry run participation.
- Lead efforts to integrate ITRC documents and training into state environmental agency planning, decision-making, and in guidance at multiple levels with agency.
- Attend POC-relevant portions of ITRC major meetings (ITRC Spring Meeting and ITRC Fall Meeting).
- Lead or contribute to the development of new ITRC project proposals (e.g. for new Technical Teams).
- Provide expected level of state interest and participation in potential new ITRC projects.
- Identification and communication of state environmental priorities to ITRC.
- Recruitment of new state ITRC Technical Team members and POCs.
- Respond to ITRC member information requests.
- Establish a process with the state environmental agency to provide concurrence with ITRC documents and facilitate getting state concurrence.
- Distribute ITRC documents.
- Promote state attendance at ITRC training courses.
- Generate and report out on success stories.

State Engagement Focus Areas, Overall Goals, and Performance Metrics

SEP Focus Area	Goal	Metrics
I. Identify State Environmental Priorities and Emerging Environmental Challenges	Help ITRC focus on state environmental priorities, communicate state environmental priorities to federal funders, and forecast future environmental challenges for ITRC action.	<ul style="list-style-type: none"> • # states submitting environmental priorities • # states providing expected level of participation • # states initiating project proposals
II. Broadening the State Network	All 50 states and DC (and appropriate US territories) as formal ITRC members via appointing a POC and each POC participating in ITRC actively	<ul style="list-style-type: none"> • # of states with confirmed POCs • # of states with active POCs • # of states joining ITRC by appointing a new POC • # of POC transitions supported

SEP Focus Area	Goal	Metrics
<p>III. Knowledge Transfer to States; Implementation of ITRC Products</p>	<p>Transfer of new technical information and guidance to state regulators via implementation of ITRC products, so that environmental processes are more effective, proceed faster, and with less cost to all involved. This goal includes:</p> <ul style="list-style-type: none"> • Use of ITRC documents in state guidance or for state projects; • Increasing the number of state staff and others taking ITRC training; and • Increasing the acceptance and use of innovative environmental approaches (reducing regulatory barriers). 	<ul style="list-style-type: none"> • # of ways states are using a document (e.g. directly in guidance, referenced in guidance, used at a specific site or recommended use at all sites is a specific category) • # of state regulators trained (# overall, #per state) • # of states responding to concurrence requests • # of concurrences achieved per state relative to documents released • # of success story leads provided • # of documents distributed to the state
<p>IV. Ensuring Usability and Quality of ITRC Products</p>	<p>To provide feedback to ITRC Teams on products throughout the project lifecycle and prior to implementation. The goal is to increase the product quality and usability. Also, involving states as much as possible in the product development cycle prepares states for acceptance and use after the product is released.</p>	<ul style="list-style-type: none"> • # of new team members referred by POCs • # of states responding to document review requests • # of states responding to surveys • # of states participating in the dry run • # of states participating in project technical sessions held at ITRC major meetings