



Request for Proposals – Key Information Needed to Develop Strategies to Address Per- and Polyfluoroalkyl Substances (PFAS) Team

Program Advisor Support for ITRC's PFAS Team

September 26, 2016

Overview

The Interstate Technology & Regulatory Council (ITRC) is a State led, public-private coalition working to reduce barriers to the use of technically sound innovative solutions to environmental challenges through an active network of environmental professionals. 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 50 states and the District of Columbia, ITRC truly provides a national perspective. More information on ITRC is available at www.itrcweb.org.

ITRC achieves its mission through projects completed by ITRC teams. ITRC teams are composed of state and federal environmental regulators, federal agency representatives, industry experts, public/tribal stakeholders, and academia. ITRC teams typically have between 60-75 members; however, the PFAS team could be substantially larger. Projects are completed over two to three years and include activities such as conducting surveys of state agencies, facilitating the team writing of fact sheets, case studies, and technical regulatory guidance documents, and instructing environmental professionals on technical topics as needed. The PFAS team will begin by writing 6 different fact sheets and will be organized into subgroups. A detailed description of ITRC products is provided in "Framework for Developing Quality ITRC Technical and Regulatory Guidance Documents," available at <http://www.itrcweb.org/Documents/Team-Resources/Phase3/ITRC-Quality-Framework-FINAL-December-2013.pdf>.

Teams are led by Team Leaders, who are state agency representatives. Teams are supported by technical/management contractors referred to as Program Advisors (PAs). Work is completed at three in-person meetings per year, as well as through conference monthly calls and web-based meetings that are scheduled at regular intervals. A typical ITRC project has an active phase lasting two to three years, followed by an implementation phase for outreach and training. However, other project life cycles are possible, depending on the specific work plan developed by the ITRC team. A detailed description of the ITRC project life cycle is given in "ITRC Project Life Cycle White Paper," available at <http://itrcweb.org/Documents/Team-Resources/ITRC-Project-Life-Cycle-White-Paper-Short-December-2013.pdf>.

This Request for Proposals (RFP) is for multi-year contract support for ITRC's PFAS Team. A brief description of the PFAS Team and summary of the products it plans to complete during its life cycle are given in Appendix A. The description in Appendix A is provided for example only; project content, scope, and schedule may change as the PFAS Team formalizes its work plan each year.

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Background

ITRC's PFAS Team will start in January 2017. The PFAS Team plans to be in an active phase for two to three years. The time requirement for contract support for the active phase is approximately 750 hours per year, but will vary by team and the experience of the Program Advisor. The PFAS Team schedule and time requirements for each phase are provided for example only; project content, scope, and schedule may change as the PFAS Team formalizes its work plan each year.

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, nonprofit, nonpartisan association representing the state and territorial environmental commissioners. Its mission is to serve 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 positions on environmental issues. ERIS issues and administers contracts on behalf of ITRC.

Definitions

"Proposer" refers to the responder to the RFP and describes the person or organization seeking the contract. "Proposer" 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 may result in disqualification of the proposal.

The words "will," "should," or "would" are used to describe an advisory or permissible action.

Administrative Information

- This RFP is for a fixed price contract from January 1, 2017 to December 31, 2019, dependent on the availability of funding and ITRC team work plan and goals. The maximum performance period is January 1, 2017 to December 31, 2019.
- There will be no pre-submittal conferences.
- Proposers must not be subcontractors.
- A Key Person cannot support more than two active ITRC Teams without a description outlining how the key person would handle the facilitation of overlapping ITRC team meetings (see Cover Letter/Key Persons section under Proposal Requirements for more information).
- One electronic copy of the proposal must be received by **5:00 PM Eastern time, Friday, October 28, 2016**. Late proposals will not be accepted or evaluated. Proposals must be e-mailed to preyes@ecos.org. Receipt of proposal will be acknowledged by return e-mail no later than one business day after the proposal is received. It is the responsibility of the proposer to follow up if the proposer does not receive confirmation by ITRC that the proposal was received. Problems with e-mail submittal can be addressed at any time to Patricia Catherwood Reyes, ITRC Director, at office # (202) 266-4933 or cell # (202) 590-4621.

- 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.
- A visually presentable proposal is expected. However, proposals will not be evaluated on the basis of esthetic embellishments.
- Select Proposers **may** be contacted to schedule an approximately one-hour phone interview between Key Persons and ITRC leadership at a mutually convenient time. Interviews, if scheduled, will take place during the week of November 14, 2016.
- Selection will be completed by November 18, 2016, and a contract will be offered by November 25, 2016. All Proposers will be notified by e-mail of the result of the selection process by December 1, 2016.
- All requests, questions, or other communications about this RFP must be made in writing and submitted by e-mail to Patricia Catherwood Reyes, ITRC Director, preyes@ecos.org. A response will be provided no later than one business day after receipt of inquiry. Communications made to other ITRC, ERIS or ECOS personnel or associates will not be allowed or recognized and may disqualify the proposal. Inquiries and questions will be received and answered up to the proposal deadline.
- As part of the evaluation process, proposals and other information on Proposers may be shared with ECOS staff, ITRC Board of Advisors members, and ITRC Team Leaders.
- Proposer acknowledges that submission of a proposal in response to this RFP does not create a contract between the Proposer and ITRC, ERIS, or ECOS.
- Disadvantaged, veteran-owned, women-owned, and minority-owned Proposers 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) will not be evaluated. Addenda in or to the proposal other than the requirements listed here will not be considered during the evaluation.

Cover Letter/Key Persons

Proposers shall submit a one page cover letter on Proposer letterhead indicating the Proposer'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.

A Key Person that is supporting more than two active ITRC Teams must provide a description outlining how the key person would facilitate overlapping ITRC team meetings (i.e., the second Key Person will provide support for a specific ITRC team that may meet simultaneously at ITRC Meetings).

Narrative

Proposers shall submit no more than a three-page narrative outlining the technical and management capabilities of the Key Persons and how these capabilities will allow the PFAS Team to complete its projects on schedule and with excellence. The narrative must connect the

knowledge, skills, and abilities of Key Persons to the specific requirements listed in the Technical and Management Requirements section and the summary of the PFAS Team given in Appendix A. The Proposer must show understanding of ITRC's products and project life cycle, including project stages and general schedules.

Resume(s)

Proposers shall submit no more than two-page resumes of the Key Persons 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 Persons).

Pricing

A one-page price statement that includes a fixed price annual amount for approximately 750 hours per year to be completed each of three calendar years starting on January 1, 2017 and ending December 31, 2019. Please make sure to consider the estimated time requirements in the Background section when formulating a pricing response. The actual contract amounts and work scope will be negotiated with the selected Proposer at the time of contract award.

Proposer Information

1. Full legal name of the company and corporate address
2. State of incorporation or headquarters
3. Is your firm subject to any litigation, judgment, debarment, or suspension that would prohibit it from fulfilling the terms of the contract?
4. Are you a disadvantaged, women-owned, or minority-owned firm?
5. Current number of people employed
6. 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

- The fixed price amount is each year for the period of performance January 1, 2017 to December 31, 2019.
- The fixed price proposed for the work shall include all labor, materials, overhead, and travel costs for the Proposer's Key Persons indicated for the work.
- Printing and publishing of final PFAS Team documents will be provided by ITRC and is not included in this RFP. However, intermediate printing of draft documents, routine communications, special reports, and background materials (with the exception of other direct costs as indicated next) should be included in the fixed price.
- Other direct costs that are incurred on behalf of ITRC and directly related to ITRC Team projects (e.g., meeting space rental, transportation costs for site visits, team meal functions, and advertising/marketing materials) will be reimbursed by ITRC at cost with prior approval from ITRC **and should not be included in the fixed price amount given in the price statement.**
- For the base contract period January 1, 2017 to December 31, 2017, the Key Persons from the Proposer awarded the contract shall attend three ITRC-facilitated meetings that are, on average, three days long. The three meetings are as follows:
 - ✓ 2017 ITRC Kick-Off Meeting (January 30, 2017 – February 1, 2017, Cocoa Beach, FL)

- ✓ 2017 ITRC Annual Meeting (March 27-30, 2017 in New Orleans, LA)
- ✓ 2017 ITRC PFAS Fall Team Meeting (date and location to be determined)

The ITRC Kick-Off Meeting is a yearly leadership and organizational meeting and is attended by ITRC leadership, including Program Advisors (ITRC teams do not meet at the Kick-Off Meeting). The ITRC Annual Meeting consists of ITRC Team meetings and whole-organization sessions. The ITRC PFAS Team meeting is an individual team meeting at a location and date determined by the team. Additionally, participation in monthly or semimonthly (or as needed) conference calls or web meetings is expected. Additional time requirements are detailed in the Background and Technical and Management Requirements sections.

Technical and Management Requirements

The objective of this procurement is to provide technical and management services during the project life cycle of ITRC's PFAS Team. A brief description of the PFAS Team and summary of the products it plans to complete during its life cycle are given in Appendix A. The description in Appendix A is provided for example only; project content, scope, and schedule may change as the PFAS Team formalizes its work plan each year. The Proposer is expected to assist the PFAS Team and Team Leader(s) with meeting deadlines for successful project completion, including facilitating meetings/calls to achieve desired outcomes and writing and editing technical documents and training curricula. High-quality work is expected. The Proposer will be responsive to PFAS Team Leader requests and assignments. The Proposer and Key Persons shall meet the following specific requirements:

Requirements:

- Proposer must provide support for the PFAS Team, including, but not limited to, maintaining current contact information of team members, facilitating communications, planning and scheduling team meetings (location and facility is provided by ITRC), preparing call/meeting agendas, and scheduling conference calls and web meetings.
- Proposer must have experience in managing teams of technical experts as they develop written technical products.
- Proposer must have familiarity with environmental regulatory issues.
- Proposer must show project management experience, including budgeting, planning, tracking, and updating project status and expenses. If awarded the contract, Proposer must use ITRC project management and budgeting tools for team project management, including submittal of monthly work plans using ITRC's template.
- Proposer must show ability to plan, convene, and facilitate meetings (meeting facilities will be procured through ITRC, but the Proposer is expected to plan, attend, and facilitate the PFAS Team's portion of the meeting).
- Proposer must show ability to write and edit documents, case studies, surveys, fact sheets, develop training curricula and presentations and support social media outreach. If awarded contract, Proposer must adhere to ITRC quality assurance programs and guidelines for document writing and training development.
- Proposer must have basic technical expertise (science or engineering education, training, or experience) in one or more of the following areas: contaminated site assessment, investigation, and cleanup; environmental regulations; contaminant or aquatic chemistry;

remediation processes; groundwater hydrology; drinking water sampling; risk assessment; and/or environmental science/technology. Direct experience with the topic of PFAS assessments is desired, but not required (although Key Persons should be familiar with the topic).

- Proposer must provide its own work facilities and materials. ITRC will not provide workspace or supplies for Proposers.
- Proposer must be proficient (or able to become proficient) in computer software used by ITRC such as Microsoft Office, Adobe Acrobat, survey tools (e.g., SurveyMonkey), web-conferencing applications (e.g., Adobe Connect), and tools for editing web-based documents. ITRC will provide access to software that is not commonly used (licenses for Microsoft Office will not be provided).
- Proposer should be accessible during normal working hours and be responsive to telephone and e-mail messages.
- Proposer should have the ability to assist in maintaining the PFAS Team's webpage on the ITRC web site. This includes the organization of files in the team's "file cabinet" and the team's "web page" (no web design or writing of code is required).

Evaluation Criteria

Proposers (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 the "best value" of their fixed price proposal cost. Select proposers may be contacted to schedule a short 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.

Waiver and Acknowledgements

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

ERIS/ITRC reserves the right to award the contract at its sole discretion and based on any factors it chooses to consider. Preference may be given to disadvantaged, veteran-owned, women-owned, or minority-owned firms. Proposers acknowledge that a proposal does not create a contract between the Proposer and ECOS, ERIS, or ITRC. In addition, ECOS, ERIS, and ITRC may distribute proposals, via e-mail or otherwise, to a committee of state employees and others who will act as reviewers. Proposals will not be shared outside of ECOS, ERIS, the ITRC Board of Advisors, and the committee of reviewers, except as required by a judicial order or other legal obligation. Some of these reviewers may be bound by their state's requirements to disclose information sent through their state's e-mail system.

By submitting a proposal in response to this RFP, Proposers agree to keep confidential and not use or disclose any information acquired during the bidding process concerning ECOS, ERIS, or ITRC, its business, finances, or operations. The provisions of this section shall not prevent

Proposers from disclosing information to the extent required by a judicial order or other legal obligation, provided that, in such event, the Proposer shall promptly notify ERIS in writing and shall cooperate with ERIS to contest or minimize the scope of the disclosure (including application for a protective order).

Appendix A: Project Summary

(More information on the project is available in, “2017 ITRC Project Proposal PFAS”, which is located at <http://itrcweb.org/About/past>)

Key Information Needed to Develop Strategies to Address Per- and Polyfluoroalkyl Substances (PFAS) Team

Project: (1) The team will develop fact sheets for six of the seven subject matter areas, which will be distributed in the first six to twelve months. The fact sheets will provide detailed technical information for use by regulatory agencies and the regulated community, including status of the science for the subject matter area, current challenges surrounding the topic, and a summary of authoritative reference materials for users that want to learn more about PFAS. (2) The team will develop a Technical and Regulatory Document on the issues summarized above with emphasis on providing a unified and comprehensive technical document on the current state of the practice and knowledge of the seven core subjects. (3) The team will develop an internet-based training module for presentation as part of ITRC’s ongoing training program. (4) The team will also seek out additional technology transfer opportunities. For example, Battelle has expressed interest in providing opportunities including short courses, platform sessions, and/or discussion panels at their annual meetings. The final team scope will be determined by the team at their first full meeting in March 2016.