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## **Implementing the Use of Advanced Site Characterization Tools Team**

Program Advisor Support for ITRC's Advanced Site  
Characterization Tools Team

September 28, 2017

### ***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, fact sheets, case studies and internet and classroom training that deepens technical knowledge and expedites quality regulatory decision-making while protecting human health and the environment. With public and private 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](http://www.itrcweb.org).

ITRC achieves its mission through projects completed by ITRC teams. ITRC teams are composed of state, federal, and tribal environmental agency representatives, industry experts, public stakeholders, and academia. ITRC teams typically have between 60-75 members. Projects are completed in two years and include activities such as conducting surveys of state agencies, facilitating the team writing of fact sheets, case studies, technical regulatory guidance documents, developing videos, and training environmental professionals on technical topics. 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 monthly conference calls and web-based meetings that are scheduled at regular intervals. A typical ITRC project has an active phase lasting two years, followed by an implementation phase for outreach and training.

This Request for Proposals (RFP) is for a two-year fixed price contract to support ITRC's Implementing the Use of Advanced Site Characterization Tools Team. A brief description and summary of the Team and its project can be found at <http://itrcweb.org/Documents/planning/2018/Implementing-Use-of-Advanced-Site-Characterization-Tools.pdf>. The proposal is provided for example only; project content, scope, and schedule may change as the 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.

## ***Background***

ITRC's Advanced Site Characterization Tools Team will start in January 2018. The time required for contract support each year is approximately 700 hours per year, but will vary by team and the experience and skills of the Program Advisor. The contract will be a firm fixed price contract for 2 years.

## ***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, 2018 to December 31, 2019, dependent on the availability of funding and ITRC team work plan and goals. The maximum performance period is January 1, 2018 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/Proposer Information section under Proposal Requirements for more information).
- One electronic copy of the proposal must be received by **5:00 PM Eastern time, Friday, October 20, 2017**. Late proposals will not be accepted or evaluated. Proposals must be emailed to [preyes@ecos.org](mailto:preyes@ecos.org). Receipt of proposal will be acknowledged by return email no later than three business days 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 email submittal can be addressed at any time to Patricia Catherwood Reyes, ITRC Director, at office # (202) 266-4933 or cell # (202) 590-4621.

- 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 and final selection will be complete by November 17, 2017.
- All requests, questions, or other communications about this RFP must be made in writing and submitted by email to Patricia Catherwood Reyes, ITRC Director, [preyes@ecos.org](mailto:preyes@ecos.org). A response will be provided no later than three business days 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/Proposer Information

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).

#### 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

### 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 Advanced Site Characterization 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. 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 Information

- A **one-page** price statement that includes a fixed price annual amount for approximately 700 hours per year to be completed each of two calendar years starting on January 1, 2018 and ending 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 Advanced Site Characterization Tools 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., 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, 2018 to December 31, 2018, the Key Persons from the Proposer awarded the contract shall attend three ITRC meetings that are, on average, two to three days long. The three meetings are as follows:
  - ✓ 2018 ITRC Kick-Off Meeting (Week of January 29 or February 5, 2018, TBD)
  - ✓ 2018 ITRC Annual Meeting (April 16-19, 2018 in Anaheim, CA)
  - ✓ 2018 ITRC 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 Fall Team meeting is a smaller gathering of ITRC Teams and leadership. 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 Advanced Site Characterization Tools Team. The Proposer will have

a strong skill set in team facilitation, coordination, and administration. A brief description of the Team and summary of the products it plans to complete during its life cycle are given in the technical proposal. The Proposer is expected to assist the 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. The Proposer will be responsive to Team Leader(s) and ITRC's requests and assignments. The Proposer and Key Persons shall meet the following specific requirements:

Requirements:

- Proposer must provide support for the Advanced Site Characterization Tools Team, including, but not limited to, maintaining current contact information of team members, facilitating communications, planning and scheduling team meetings, preparing call/meeting agendas, and scheduling conference calls and web meetings.
- Proposer must possess strong facilitation skills and the ability to manage 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 Team's meetings).
- Proposer must be knowledgeable of software to develop computer tools associated with the Team's products.
- 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 the 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 Advanced Site Characterization Tools 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, EndNote, WordPress, SharePoint, survey tools (e.g., SurveyMonkey), web-conferencing applications (e.g., Adobe Connect, FreeConferenceCall), 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 must have the ability to assist in maintaining the Team’s private 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. Proposers that identify new and efficient processes to enhance ITRC team management will be considered as well. 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. 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).