

REQUEST FOR PROPOSAL

PLANNING, DESIGN, AND IMPLEMENTATION OF COMMUNITY-BASED GREEN INFRASTRUCTURE (CBGI)

CONTRACT NO. G98002P07

The Milwaukee Metropolitan Sewerage District (District) is issuing this Request for Proposal (RFP) to solicit potential private sector or NGO Partners (Partner) to submit proposals to the District for the services described.

BACKGROUND AND SUMMARY

The District is seeking a Partner to bring about a cost-effective, large-scale increase in green infrastructure implementation in the District's service area. The partnership would provide an alternative project delivery model that develops lower-cost implementation of green infrastructure (GI) by assessing and implementing efficiencies in GI placement, design, and financing, while also incorporating environmental and socio-economic objectives. The purpose of this RFP is two-fold: 1) to solicit potential Partners for their experience, expertise, and capacity to plan, design, and perform construction management of a scaled-up GI program, and 2) to solicit potential Partners who demonstrate an understanding of the District's goals and who describe an approach for how a team may go about developing a program plan. Depending on the qualifications and project approach submitted, the District may choose to interview potential partner teams to further select an appropriate team to undertake the first phase of this work.

The District is interested in establishing a community-based program that scales up current GI implementation in flexible and adaptive ways that achieve significant GI gallons of capture capacity. The community-based GI (CBGI) delivery model is expected to accelerate the pace at which the District installs GI. The foundational goals of the program include:

- Help the District to achieve compliance with the GI requirements in the District's current Wisconsin Pollutant Discharge Elimination System (WPDES) permit.
- Help the District's participating municipalities meet current and future Municipal Separate Storm Sewer System (MS4) permit requirements.
- Minimize the cost per gallon of GI storage.
- Achieve a *minimum* of 20 million gallons of capture capacity in GI.
- Attain a goal of certified Small, Veteran, Women, and Minority Business Enterprises (S/W/MBE) participation of 25 percent or higher.
- Partner with local workforce development programs.
- Include mentorship of emerging businesses.
- Identify non-traditional funding sources that could be considered or leveraged.
- Accelerate achievement of District goals by completing GI construction within three years.

- GI installation is expected to be in both the combined sewer area and the separated sewer area.

The District will undertake the development of a community-based GI program in four distinct phases. **At this point, the District anticipates issuing a contract for Phase 1 only; however, the District may extend that contract to include future phases at its discretion. Therefore, proposers are advised to assemble a team that is qualified to perform all phases of the project.**

CBGI Phases:

- Phase 1. CBGI vision, alternatives analysis that conceptually develops packages of GI alternatives to achieve the minimum 20 million gallons, program framework (including knowledge of workforce development and identification of potential non-traditional funding sources and financing strategies that integrate with and do not duplicate existing funding and financing strategies, and that complement GI types in the alternatives analysis packages), and performance metric development
- Phase 2. Green Infrastructure Preliminary Engineering, Design, Real Estate Permissions, and Financing Plan Development
- Phase 3. Engineering Services During Construction, Owner's Representation
- Phase 4. Post-Construction Vegetation Establishment, and Long-term Operations and Maintenance Strategy

Phase 1 is anticipated to include a significant amount of discovery, planning, and analysis of possible alternatives packages by the Partner. It is expected that there will be back and forth between the District and the Partner to compare and select alternative packages, determining the best course(s) of action to achieve the foundational goals of this project and the financing strategy. The expected outcome of Phase 1 is a plan that dictates how Phases 2 through 4 will be carried out as well as a performance metric process. Submittals from Proposers should illuminate the team's expertise and experience that matches the desired team skillsets (see Qualifications of Partner Sought, item C). Responses to this RFP should provide a specific approach for how to achieve a successful Phase 1, including the documents identified in this RFP in the Attachment List on page 4 under Qualifications of Partners Sought – Part A.

Phase 2 is anticipated to encompass preliminary engineering, design, real-estate tasks, and developing bid documents, and further develops a financing strategy that meets with the design and construction needs of this program.

Phase 3 is anticipated to encompass construction management activities, including but not limited to, acting as an owner's representative, fulfilling quality assurance throughout construction, and providing engineering services during construction (design support, review of materials and methods submittals, and inspection of construction materials and methods).

Phase 4 is anticipated to encompass the long-term operations and maintenance of the green infrastructure including, but not limited to, carrying out a 5-year vegetation establishment plan, ensuring the GI implemented is meeting performance expectations, and ensuring the GI is

inspected and maintained over the life of the conservation easement (How this is carried out will be determined through the planning efforts in Phase 1).

As a reminder, this RFP is for Phase 1, contracts for subsequent phases will be determined by District discretion and overall performance in Phase 1, and is not guaranteed. However, Proposers are encouraged to assemble a team that is capable of performing the entire project.

Key Assumptions for Approach Consideration

- The District expects that the cost of GI will be minimized through efficiencies, and therefore, expects a reduction in cost per gallon, under the District's current funding model of \$1.76/gallon (capital cost). Multiple projects may be averaged to calculate this cost.
- Projects funded with District capital funds would be required to enter into a conservation easement/maintenance covenant ensuring care of the asset for a minimum of 11 years, with longer easement durations preferred. Risk and obligation for this will be evaluated in the program framework and will be assigned for later phases of this project.
- GI gallons storage will be based on the approved counting methods included in **Attachment D**.
- GI storage capacity, as described by the District, is the maximum gallons capacity to be held within GI during any given storm.

SUBMITTAL GUIDANCE

The District invites submittals from any potential Partners that demonstrate competent Partner skillsets and experience relating to this type of work. Submittals should demonstrate the Partner team's ability to manage this program in all four phases: planning, location/real estate services and design, construction management, and post-construction.

Project Approach:

As a part of qualification submittals, the District requests potential partners provide information on how they could potentially achieve the following anticipated activities (approach) during Phase 1:

Anticipated Tasks of Phase 1:

- Develop of a vision that identifies overall program goals that identify GI installation methods and minimizes GI cost per gallon.
- Develop a comprehensive approach for planning, design, and construction management of GI to address foundational goals from page 1 of this RFP, the framework.
- Perform a location/real estate analysis to guide the most efficient and effective project installations. Projects can be on either private or public lands.
- Include local workforce development, mentorship of emerging business, and identify non-traditional funding sources that could be considered or leveraged, as well as traditional funding sources. Develop a financial plan including an an analysis of potential funding options that not only looks at traditional funding sources, but also assesses and identifies any non-traditional funding sources that can help reduce the cost per gallon of GI.

- Provide a strategy for 5 years of post-construction vegetation establishment. That strategy would be further refined in phase 2 during design.
- Devise a long-term maintenance strategy past the 5-year vegetation establishment window.
- Develop, with the District, a performance assurance metric mechanism (potentially such as retainage or delayed payments) to ensure implementation and improved performance.
- Prepare and deliver to the Owner comprehensive written draft and final reports including CBGI Alternatives Analysis, Program Framework (including identification of potential non-traditional funding sources and financing strategy), and Performance Metric Development.

The above anticipated tasks for Phase 1 are not considered an exhaustive list and the District is open to additional or alternative suggestions as part of the proposal submittal.

Qualifications of Partner Sought:

Overall Partner qualifications should demonstrate the Partner’s ability to carry this program through all four phases. The Partner’s qualifications section should focus on the Partner’s ability to meet the broad areas of expertise below. The District will evaluate each of these items as part of the selection process.

- A. Planning, to identify GI project locations based on a number of site screening factors including (but not limited to): the District’s Regional GI Plan, the District’s 2050 Facilities Plan (expected January 2020), the District’s Urban Biodiversity Plan, the District’s Regional Resiliency Plan, and manmade features that may purpose themselves to GI (e.g. alleys, parks, schools, libraries, large parking lots, etc.). The District expects both the combined and the separated sewer areas to be targeted for GI implementation. The list below includes attachments that have information to be considered in the proposed approach:

Attachment List:

- A. MMSD GI Service Area Municipalities and Map
- B. CSSA (Combined Sewer Service Area) Potential GI Locations Map
- C. MMSD Service Area Land Use Table
- D. Green Infrastructure Capacity Calculation Methods
- E. Link to MMSD Plans for GI and Urban Biodiversity, and Fresh Coast Guardian’s Website
- F. WPDES Permit (4/1/2019-3/31/2024): CSO Performance Standards Section

- B. Project management, including (but not limited to) the ability to:
1. Manage technical teams, coordinate and prioritize work to find efficiencies.
 2. Procure services using government rules for planning, design, construction (including engineering services during construction), and operation/maintenance.

3. Provide necessary public relations/community outreach.
 4. Develop and track key performance indicators (KPIs) to measure success towards project goals.
- C. Desired Team Skillsets:
- a. Green Infrastructure Design, Landscape Architecture
 - b. Urban Planning
 - c. Real Estate
 - d. Financing for Public/Private Partnerships (awareness of non-traditional funding sources)
 - e. Workforce Development
 - f. General Contracting, Public Bidding, and Construction Management
 - g. Communications and Outreach
 - h. Vegetation Establishment and GI Maintenance
- D. Location selection for GI implementations. Following location selection and assuming locations may be physically grouped, bundle projects by location, type, common landowner, or other types deemed efficient to design, fund, permit, construct, and operate/manage.
- E. Design services, drawings, specifications, cost estimates, schedules, bid and award services, construction management, public relations, and maintenance requirements (including manuals and training).
- F. SWMBE involvement, strategy to ensure meaningful work experiences using S/W/MBE participation goals of 6% for small or veteran-owned business, 6% for women business, and 13% for minority business enterprises.
- G. Workforce development strategy to ensure meaningful work experiences by participants in local workforce training programs in multiple aspects of the projects including planning, design, construction and post-construction phases. The District is especially interested in a post-construction maintenance program utilizing workers from the District's Fresh Coast Guardians Ambassador Program and those certified through the National Green Infrastructure Certification Program.
- H. Mentoring of emerging business. Proposal team should include at least one local emerging business that will receive business development mentoring throughout the project.
- I. Work with District financial staff to understand current District financing and develop potential financing strategies that identifies sources of funding beyond Clean Water Fund Loans and municipal bonds that might help to reduce the District's cost per gallon.
- J. Development of a strategy for post-construction site assessments and maintenance.

A detailed scope of services and fully loaded hourly compensation rates for key staff for Phase 1 of this project are required, however, this information will not be published (use Excel Workbook provided). It is anticipated that the potential Partner will provide a project approach and develop a level of effort based on the approach. The submittal will be qualitatively reviewed and negotiations for Phase 1 effort will take place thereafter. The District is open to reviewing various strategies for accomplishing its objectives, and examples of similar successful projects are welcomed.

GENERAL

Firms wishing to be considered in the consultant selection process must submit a Proposal Package **no later than 10:00 a.m., central time, on July 2, 2019**. No proposals will be accepted after this date and time.

This District has implemented online proposal submissions for this Project. **Only electronic submissions via our secure portal will be accepted.** Please see the next section entitled "SUBMISSION INSTRUCTIONS FOR PROPOSERS" on how to submit a proposal.

All proposals shall be written in English. All proposals shall contain concise written material and may contain illustrations. Legibility, clarity and completeness are essential. All submittals must use 8-1/2" x 11" portrait format, but may be supplemented using 8-1/2" x 11" landscape or 11" x 17" illustrations. The proposed schedule chart and level of effort spreadsheet may be presented on more than one 11" x 17" page if necessary. Twelve-point font shall be used. Marketing brochures are not allowed.

A complete Proposal Package shall consist of the following documents:

- A Transmittal Letter on company letterhead clearly identifying the firm name, address, and telephone number. The Transmittal Letter shall be signed by a person authorized to submit and sign a proposal and include the name of the person authorized to submit/sign the proposal, their title, telephone number, and e-mail address. (1-page maximum)
- Description of proposed partnership approach and strategies for success. (10-page maximum)
- Project Manager / Key Personnel/ SWMBE/ Emerging Business Involvement (10-page maximum)
- Overall Qualification of Firm /Team (10-page maximum)
- Resumes (1-page maximum for project manager and each key person)
- EEO Data Form
- Non-Discrimination Certification
- Hourly Rate Excel Spreadsheet

The District reserves the right to accept or reject any or all proposals and to waive informalities or irregularities in the selection process.

The District will not be liable for any costs incurred by the respondents in replying to this RFP. In addition, the District is not liable for any costs for work or services performed by the selected consultant prior development of a contract and issuance of a written Notice to Proceed.

Requests for further information or questions regarding this Request for Proposal should be addressed only to the Contact Person listed below. UNAUTHORIZED CONTACT REGARDING THIS REQUEST FOR PROPOSAL WITH ANY DISTRICT EMPLOYEE MAY RESULT IN DISQUALIFICATION. Any oral communication will be considered unofficial and non-binding. Proposers shall rely only on written addenda issued by the individual listed below.

**Ms. Tykesha White
Procurement Specialist
Milwaukee Metropolitan Sewerage District
260 West Seeboth Street
Milwaukee, WI 53204-1446
e-mail: twhite@mmsd.com**

The District is a unit of local government obligated to comply with Wisconsin’s Public Records Law, Wisconsin Statutes secs. 19.31 through 19.39. The presumption under the law is that public records shall be open to the public unless there is a clear statutory exception, unless there exists a limitation under the common law, or unless there is an overriding public interest in keeping the public record confidential. As such, Proposers should assume that their Proposals will be subject to disclosure under the Public Records Law.

Proposals will only be accepted from firms authorized to do business in the State of Wisconsin.

SUBMISSION INSTRUCTIONS FOR PROPOSERS

Please follow these instructions to submit via our Public Portal.

1. Prepare your submission materials:

Name	Type	# Files	Requirement
Transmittal Letter	File Type: PDF (.pdf)	1	Required
Project Manager / Key Personnel	File Type: PDF (.pdf)	1	Required
Overall Qualification of Firm / Team	File Type: PDF (.pdf)	1	Required
Project Approach	File Type: PDF (.pdf)	1	Required

Name	Type	# Files	Requirement
Resumés	File Type: PDF (.pdf)	1	Optional
EEO Data Form	File Type: PDF (.pdf)	1	Required
Non-Discrimination Certification	File Type: PDF (.pdf)	1	Required
Compensation/Hourly Rate Spreadsheet	Excel Workbook	1	Required

- Please note the type and number of files allowed. The maximum upload file size is 100 MB.
- Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.
- All electronic documents submitted in response to this proposal shall not contain file restrictions (e.g. encryption, password protection, special security, or the like) that prevent the District from combining multiple electronic documents into one for records management purposes.

2. Upload your submission at:

<https://mmsd.bonfirehub.com/projects/view/14196>

Your submission must be uploaded, submitted, and finalized prior to the Closing Time. We strongly recommend that proposers take sufficient time and at least ONE hour before Closing Time to begin the uploading process and to finalize your submission.

Important Notes:

- Each item of Requested Information will only be visible to the District after the Closing Time.
- Uploading large documents may take considerable time, depending on the size of the file(s) and your Internet connection speed.
- You will receive an email confirmation receipt with a unique confirmation number once you finalize your submission.
- Minimum system requirements: Microsoft Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. JavaScript must be enabled.

Need Help? - Milwaukee Metropolitan Sewerage District uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at Support@GoBonfire.com for technical questions related to your submission. You can also visit their help forum at <https://bonfirehub.zendesk.com/hc>

PRE-PROPOSAL MEETING

A pre-proposal meeting including a conference call connection will be held at **10:30 a.m.**, central time, on **May 29, 2019** at District Headquarters, 260 West Seeboth Street, Milwaukee, WI, 53204. The purpose of the meeting will be to present the project and RFP for the contract, convey details about proposal requirements and expectations, and answer questions. All potential Partners are encouraged to attend the meeting or join the conference call. Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/793695749>

You can also dial in using your phone.

United States: +1 (312) 757-3121

Access Code: 793-695-749

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SMALL, VETERAN, WOMEN AND MINORITY BUSINESS ENTERPRISE PARTICIPATION

The District maintains a policy to ensure that certified Small, Veteran, Women, and Minority Business Enterprises (S/W/MBE) offering professional services will be allowed the maximum feasible opportunity to compete for District contracts and subcontracts.

The S/W/MBE participation goals for this contract (expressed as a percentage of the total contract dollar amount) are 6% for small or veteran-owned business, 6% for women business, and 13% for minority business enterprises. The selected Partner will be expected to follow the District policies and procedures which will be further discussed during contract negotiations. Information is available at the District's website – <https://www.mmsd.com/procurement/swmbe-diversity>

SELECTION PROCESS AND SCHEDULE

The submittals received in response to this request will be evaluated by a Consultant Selection Advisory Committee (CSAC). The District will not release the names of committee members and requires that potential Partners direct any questions to the District Contact Person. The CSAC will evaluate the qualifications proposals using the evaluation criteria outlined herein.

Depending upon the thoroughness of the proposals and because of time constraints, the District may select a consultant based upon the initial proposal submittal. Do not assume there will be an opportunity to submit additional information.

If the District intends to hold interviews, the highest-ranked potential Partners will be contacted to schedule an interview. Information obtained through written communication or interview will be used to further evaluate the proposal(s). The initial scores awarded for proposal(s) are subject to change based on written communications and interviews, if held.

The District will enter into contract negotiations with the highest-rated team or teams. Upon successful negotiations, District staff will recommend to the District Commission a contract award.

The following is the proposed schedule for this project, including anticipated District timeframes for selection and award:

May 15, 2019	Distribute Request for Proposal (RFP)
May 29, 2019 at 10:30 a.m.	Pre-Proposal Meeting – District Headquarters, 260 West Seeboth Street, Milwaukee, WI
July 2, 2019 at 10:00 a.m.	Deadline for Receipt of Proposals
July 19, 2019	Selection by Committee
September 3, 2019	Complete Phase 1 Contract Negotiations
January 27, 2020	Commission Award
January 30, 2020	Notice to Proceed (NTP)