

IDAHO WATER RESOURCE BOARD

REQUEST FOR PROPOSALS

No. 18-003

FOR

**Engineering Consultant Services for
Treasure Valley Managed Recharge Feasibility Study**

May 24, 2018

REQUEST FOR PROPOSALS

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GENERAL INFORMATION

PROPOSAL

The Idaho Water Resource Board (IWRB) is seeking qualified and experienced respondents (Teams) from interested engineering firms to submit a proposal for professional, technical, and support services to complete the Treasure Valley Managed Recharge Feasibility Study (Study). The IWRB has allocated \$200,000 for this Study.

GENERAL TERMS

This Request for Proposals (RFP) does not commit the IWRB to enter into an agreement or to pay any costs incurred in the preparation of a proposal or in subsequent negotiations.

RFP ADMINISTRATIVE INFORMATION

RFP Title: Engineering Consultant Services for Treasure Valley Managed Recharge Feasibility Study

RFP Project Description: The IWRB is seeking qualified and experienced Teams to submit a proposal for technical services to complete the Treasure Valley Managed Recharge Feasibility Study

RFP Lead: Janet Garrett

Pre-Proposal Meeting: June 1, 10:00 a.m. MST

Meeting Location: IDWR – Idaho Water Center
Conf. Rm. 602C & D
322 E. Front Street, Boise, Idaho 83702

Deadline to Receive Questions: June 6, 2018, 5:00 p.m. MST

Questions Submitted Electronically: IDWR.Purchasing@idwr.idaho.gov

Proposal Submittal Alternatives:

<u>Mailing</u>	<u>Courier</u>
IWRB-RFP No. 18-003 322 E. Front Street P.O. Box 83720 Boise, ID 83720-0098	IWRB-RFP No. 18-003 322 E. Front Street Suite 648 Boise, ID 83702

RFP Schedule:

<u>RFP Milestones</u>	<u>Dates</u>	<u>Times</u>
RFP Advertisement	May 24 th	8:00 AM MST
Pre-Proposal Meeting	June 1 st	10:00 AM MST
Deadline for Questions	June 6 th	5:00 PM MST
Issue Addendum with Replies to Questions	June 12 th	5:00 PM MST
RFP Submittal Deadline	June 21 st	4:00 PM MST
Public Proposal Opening (Conf. Room D)	June 21 st	4:05 PM MST
Evaluation, Reference Verification, Select 3 Teams	June 22-July 13	
Presentations and Interviews	July 16-July 17	
Selection of top-ranking Team	July 18-July 20	
Letter of Intent to Award	July 23	
Negotiations	July 30-Aug 17	
Notice of Award	Aug 17	
Notice To Proceed	Aug 17	

REVISIONS TO RFP

All addenda to this solicitation will be posted and available for downloading on the IWRB Solicitations web page (<https://idwr.idaho.gov/IWRB/solicitations/>). Teams are responsible for regularly checking the IWRB Solicitations web page for addendums. No notice will be given by mail or e-mail.

RESERVATION OF RIGHTS BY IWRB

The issuance of this RFP does not constitute an assurance by the IWRB that any contract will be entered into by the IWRB, and expressly reserves the right to:

- Waive any immaterial defect or informality in any response or response procedure
- Reject any and all proposals
- Reissue a Request for Proposals
- Request additional information and data from any or all Teams
- Extend the date for submission responses
- Supplement, amend, or otherwise modify the RFP, or cancel this request with or without the substitution of another RFP
- Disqualify any Team who fails to provide information or data requested or who provides inaccurate or misleading information or data
- Disqualify any Team on the basis of any real or apparent conflict of interest.

By responding to this RFP, each Team (lead consultant and sub-consultants) agrees that any finding by IWRB of any fact in dispute, concerning this proposal or the responses thereto, shall be final and conclusive, except as provided herein.

CONFLICT OF INTEREST

By the submission of a proposal, the Team agrees to ensure that, at the time of proposal submittal, no member of the Team will have interest, direct or indirect, that would conflict in any manner or degree with the performance of the Team's obligations in the contract. The Team shall further covenant that, in the performance of the contract, the Team shall not employ any person, or subcontract with any entity, having any such known interest.

PROFESSIONAL CERTIFICATIONS

The Project Manager (PM) is required to have a Professional Engineering License, Professional Geologist License, or a PMP Certification by the Project Management Institute at the time of RFP submittal and must hold a license or special certification in the state of Idaho prior to the submittal of a professional document to any state or federal agencies requiring an Idaho Professional Engineering License, Professional Geologist License, or a PMP Certification by the Project Management Institute.

FINANCIAL REQUIREMENTS

Prior to negotiating a contract, the selected Team will be required to submit certified hourly rates for all team members, staff, overhead rates, expected direct/indirect expenses, and a total estimate for project costs.

STANDARD CONTRACT PROVISIONS

See Attachment 1 for the IWRB's standard contract provisions (SCP). In IWRB standard contracts, the SCP will be attached as an attachment and incorporated.

PROPRIETARY MATERIAL

IWRB assumes no liability for disclosure of proprietary material submitted by Teams. Proposal submittals shall be considered public documents pursuant to the Idaho Public Records Act (Idaho Code Title 74, Chapter 1) except to the extent portions of the submittals are otherwise protected under applicable law.

CERTIFICATION REGARDING DEBARMENT

All proposals must contain a signed Certification Regarding Debarment, Suspension, and other Responsibility Matters form for a prime and each sub-consultant. The certification form is located in Attachment 2 of this RFP.

PRE-PROPOSAL MEETING, RFP QUESTIONS, AND GENERAL CONTACT INFORMATION

A non-mandatory, pre-proposal conference will be held at the location and time indicated on page 3 of this RFP. This will be your opportunity to ask questions, in-person, of IWRB staff. All parties interested are invited to participate either by attending the conference in-person or by an established call-in number. Phone participants must pre-register to receive phone conferencing and meeting details by submitting the completed Pre-Proposal Conference Registration Form (Attachment 3). Any oral answers given by the State during the pre-proposal conference are unofficial and will not be binding on the State. Conference attendance is at the participant's own expense.

All questions submitted by mail, fax, email, or submitted on the appropriate form in the pre-proposal meeting will be addressed in one (1) addendum issued on the date listed in this RFP and posted to the IWRB Solicitations webpage. The source of all questions will be confidential, and no Teams will be identified in the responses. Questions or other correspondence must be submitted in writing to the RFP Lead listed below.

QUESTIONS MUST BE RECEIVED BY 5:00 P.M. MOUNTAIN TIME ON THE DATE LISTED IN THE RFP ADMINISTRATIVE INFORMATION

Janet Garrett

Idaho Department of Water Resources
322 East Front St
PO Box 83720
Boise, Idaho 83720
Fax: 208-287-6700

Questions concerning this RFP and submittal requirements shall be submitted via in-person at the pre-proposal meeting, mail, fax, or email to IDWR.Purchasing@idwr.idaho.gov (no questions will be accepted by telephone).

PROPOSAL EVALUATION AND SELECTION

A Selection Committee will score/rank the individual and comparative merits of the proposals received. It is the responsibility of the Team to ensure that the proposal complies with the conditions and information requested in this RFP. If a Team fails to provide any information requested in this RFP, such failure may result in either a lowered evaluation score of the proposal or disqualification of the Team. The proposals will be evaluated based on the criteria discussed in the Evaluation and Selection Criteria section. It is the IWRB's intent to evaluate the submitted proposals within 12 business days after the proposal deadline.

As part of the selection process, the three (3) top-ranked firms will be required, at their expense, to give a presentation and be interviewed by the Selection Committee at the Idaho Department of Water Resources (IDWR) State Office (322 N. Front Street Boise, ID). The total interview process will be 1.5 hours. Each Team will give a 20-minute presentation discussing their Team's approach to completing the Study. An interview agenda will be sent to the three (3) top-ranked Teams prior to the interview process. Teams will be ranked again after the interview process is complete and the highest ranking Team will be selected to begin negotiations.

Once the successful Team is selected and approved, negotiations will begin. The selected Team will be asked to submit a level of effort or a man-day estimate (details including certified hourly rates for staff, overhead rates, and expected direct/indirect expenses) associated with the Team's draft scope of services no later than ten (10) days after selection to initiate the negotiations. If negotiations are unsuccessful with the selected Team, those negotiations will be formally ended and new negotiations will begin with the next ranked Team.

Upon execution of the contract between the IWRB and the Team, the IWRB will issue a Notice to Proceed with the Study. The IWRB will notify the successful and unsuccessful Teams as soon as practicable after a contract has been executed.

PROPOSAL SUBMITTAL INSTRUCTIONS

Proposal submittals must conform to the following instructions. Any non-conforming submittals will be rejected.

Proposals must be received at the IDWR no later than 4:00 p.m. MST on June 21st, 2018. Interested Teams must provide an electronic copy on a USB Flash Drive (Adobe PDF format) and five (5) printed copies of the proposal. The Proposal must be addressed to the RFP Lead, sealed, and identified as RFP NO. 18-003, "Engineering Consultant Services for Treasure Valley Managed Recharge Feasibility Study." Include your company name on the outside of the package. Late proposals will not be considered.

All proposals must include signed copies of the following documents:

1. RFP Signature Page (see Attachment 4)
2. Acknowledgment of RFP Addendum(s) (acknowledgment form will be published with each Addendum)
3. Certification Regarding Debarment (see Attachment 2)

All Team and PM references must also be submitted to the RFP Lead at the specified location no later than 4:00 p.m. MST on June 21st, 2018.

EVALUATION & SELECTION CRITERIA

The following criteria will be considered in the evaluation and selection process. The criteria will apply to both the firm that submitted the proposal and all associated sub-contractors (Team) included in the proposal.

Subcontractors

If you intend to utilize subcontractors, describe the extent to which they will be used to comply with contract requirements. Include each position providing service and a detailed description of how the subcontractors are anticipated to be involved in the Contract. Include a description of how the Team will ensure that all subcontractors and their employees will meet all Scope of Work (SOW) requirements.

1. TEAM EXPERIENCE AND QUALIFICATIONS

Describe the Team's qualifications, organization, and capability to perform this type of project including areas of expertise and commitment to providing the necessary resources to perform and complete the project within a reasonable timeframe. Describe the Team's experience

working together on similar projects. Provide descriptions of no more than five (5) similar projects successfully developed by the Team as a group or individually within the last five (5) years. List three (3) verifiable professional service references for the Team with a contact person and telephone number. Also, have the three (3) references fill out the attached reference questionnaire (Attachment 5). Submit the Team's references to IWRB (Idaho Department of Water Resources 322 East Front St, PO Box 83720, Boise, Idaho 83720). All references must submit their questionnaire to the RFP Lead at the specified location no later than 4:00 p.m. MST on June 21st, 2018.

2. PROJECT MANAGER

Identify the PM who will be responsible for the quality and timeliness of the Team's work. The PM will also be responsible for ensuring that adequate personnel and other resources are available for the Study. Provide a brief summary of the PM's education, experience, and qualifications pertaining to the management of the Study. Also, provide descriptions of three (3) similar projects successfully developed by the PM within the last five (5) years. Include dates and specific services provided by the PM. Provide the percentage of the PM's time that will be spent on the Study. List three (3) verifiable professional service references with a contact person and telephone number. Also, have the three (3) references fill out the attached reference questionnaire (Attachment 6). Submit the Project Manager references to IWRB (Idaho Department of Water Resources 322 East Front St, PO Box 83720, Boise, Idaho 83720). All references must submit their questionnaire to the RFP Lead at the specified location no later than 4:00 p.m. MST on June 21st, 2018.

3. KEY PERSONNEL & RESOURCES AVAILABLE

Describe the proposed organization of the project Team including the responsibilities, duties, office location, and percentage of availability of the members as they pertain to the Study. Provide a brief summary of the experience, qualifications, special certifications, and Idaho professional registration (if applicable) for each person identified.

4. PROJECT APPROACH & UNDERSTANDING

Provide a written narrative demonstrating knowledge, familiarity, methodology, policies and procedures, and a project schedule with the estimated time required to accomplish the Study as outlined in the SOW. Identify proposed methodologies to accomplish the various tasks of the Study. Also identify potential issues that may be encountered and possible steps to address, eliminate, or minimize those issues. Include a description of the procedure for internal quality assurance/quality control (QAQC), innovative project methodologies/approaches, project management plan, and communication plan.

5. PRESENTATION AND INTERVIEW

The Evaluation Committee will request a presentation and interview with the top three (3) finalists including associated sub-contractors. The total interview process will be 1.5 hours. Each Team will give a 20-minute presentation discussing their Team's approach to completing the Study. Interviews are expected to take place on July 16-17. Presentation agendas will be sent out to the top three (3) Teams once they have been identified.

6. AWARD OF CONTRACT

Award of Contract will be made to the highest ranking Team.

Information and/or factors gathered during interviews, negotiations, and any reference checks, in addition to the evaluation criteria rankings, shall be utilized in the final award decisions. IWRB reserves the right to contact references other than, and/or in addition to, those furnished by a respondent.

The selected firm will be required to submit their firm's Certificate of Insurance.

The statement of qualifications, in its entirety, shall be considered a part of the contract for services for the selected firm.

EVALUATION/SCORING CRITERIA

CRITERIA	SCORING CATEGORIES	Available Points – 1,500
TEAM EXPERIENCE AND QUALIFICATIONS	Team's Project Experience, Qualifications, Knowledge, Understanding of Similar Projects, Past Working Relationship on other Projects, Project Commitment	100
PROJECT MANAGER	Manager's Experience, Education, Qualifications, Knowledge, Understanding of Similar Projects, Availability, and Dedication to the Project	100
KEY PERSONNEL, RESOURCES AVAILABLE, & ORGANIZATION CHART	Description of Proposed Organization of the Team, Key Personnel's Qualifications and Experience as it Relates to this Project, Availability and Dedication to the Project, Licenses, and Special Certifications	150
PROJECT APPROACH & UNDERSTANDING	Team's Approach to conducting the Study including: Methodologies for conducting the various Tasks, Critical Path Schedule, Identifying Innovations, Potential Issues, Project Management Plan, Communication Plan, and QAQC Procedures	250
PRESENTATION, INTERVIEW, AND REFERENCES	Communication, Project Understanding & Approach, Project Team, Project Manager, Capabilities to Field Questions from Committee, Results from Reference Verification	900

SCOPE OF WORK

TREASURE VALLEY MANAGED RECHARGE FEASIBILITY STUDY BOISE, IDAHO

INTRODUCTION

IWRB is responsible for formulating and implementing the State Water Plan for optimum development of the water resources in the public interest. The IWRB has been directed by the Idaho Legislature to identify and implement projects to stabilize and enhance groundwater supplies throughout Idaho. As such, the IWRB is commissioning the Study to develop a better understanding of the feasibility of managed recharge as a long-term water management tool in the Treasure Valley (TV). The Study will assess the volume of water available for recharge and potential areas within the study area that would be suitable for managed recharge. See Figure 1 for the study area extents. The IWRB is looking for a Team with the appropriate experience to complete the Study.

PROJECT BACKGROUND

Most of the surface water used in the TV originates as snow in the higher elevations of the upper Boise River basin. The mountain snowpack has historically provided a storage mechanism to retain wintertime precipitation and release in the spring and summer. This natural storage mechanism has been augmented with man-made reservoirs for additional surface water storage. This management strategy has increased the overall water supply and, along with groundwater pumping, provided water for use during late summer and fall. However, the future municipal water demand is expected to increase due to the continued population growth in the TV. In fact, the metropolitan area comprised of Boise, Nampa, and Meridian was one of the fastest growing in 2014 according to the U.S. Census Bureau.

The projected TV population growth can present challenges with maintaining an adequate water supply. Climate variability increases the uncertainty as to the magnitude and timing of runoff. The TV heavily relies on runoff as a major water source. Managed recharge has been identified as a potential water management strategy that could provide a more reliable and sustainable water supply to meet the increasing population demands.

The TV aquifer system is geologically complex and is affected by a dynamic interconnection between surface water and groundwater. Understanding this connection is critical to developing an effectively managed recharge program.

Within the TV, managed recharge could be applied to capture available water to meet a variety of needs such as helping to keep the regional and local aquifers in balance or developing an additional water supply for the future demand. To determine if managed recharge would be a viable tool, three key components of a successful managed recharge program need to be evaluated:

1. The availability of water for recharge,
2. Identification of locations that would be conducive for managed recharge sites, and

3. What issues could be addressed by managed recharge?

To adequately analyze the merits of managed recharge, it is important to understand the effects that managed recharge will have on the hydrologic system. In this analysis, key aspects to consider include:

1. Where and how long the water stays in the aquifer(s) (retention time),
2. Potential impacts recharge could have on the aquifer(s), and
3. The potential impacts to hydraulically connected surface water bodies.

PURPOSE

The Study's purpose is to provide water managers a resource document that will assist in determining if managed recharge is a viable tool to meet their water management goals. The Study is designed to assess the potential and viability of managed recharge throughout the TV. The Study will evaluate some of the key issues associated with managed recharge including the volume and timing of available water, identification of viable recharge sites, site-specific factors affecting the capacity for aquifer recharge, the possible use of existing infrastructure to facilitate recharge, and the costs and benefits of potential infrastructure improvements.

The Study will be conducted by an engineering Team and will be funded by the IWRB. The final product will be a technical report and the associated data used in the analysis.

SCOPE OF WORK ORGANIZATION AND APPROACH

The following SOW outline provides a summary of Team deliverables during the development and completion of the Study.

Use this SOW outline as part of your response to the RFP. Keep in mind, the evaluators will be scoring your Proposal based on the methodologies proposed and the completeness of the response to each item listed below. Describe how you will meet each requirement listed below (e.g. personnel, proposed timelines, methodologies to be used, etc.):

1. Project Management Task

The Team shall provide a PM to manage the Team's staff, ensure quality of work products, track the project budget, provide project schedules, be the point of contact for the IWRB PM, and provide progress reports throughout the Study.

1.1. Kick-off Meeting

The selected Team shall conduct a Kick-off meeting with the IWRB PM and key staff within 14 days of the Notice to Proceed issuance. The meeting objectives include:

- Introduction of the Team, key IWRB staff, and key IDWR staff,
- Presentation of the Team's proposal for the Study,
- Input from the key IWRB and IDWR staff concerning the Team's proposal, and
- Input from the key IWRB and IDWR staff concerning existing data and analysis.

1.2. Project Management Plan

The Team PM shall prepare a Project Management Plan (PMP) before the start of project work. The PMP shall be based on the Team's proposal and information obtained from the Kick-off meeting. A draft PMP shall be provided within two (2) weeks of the Kick-off meeting to the IWRB PM for comments. After approval by the IWRB PM, the Team will provide a final PMP to the IWRB PM. The PMP shall include:

- Project management procedures (meetings and progress reporting, schedule and budget tracking, conflict resolution, documenting change requests, and invoicing protocol),
- Project assumptions and constraints,
- Project team members (roles, responsibilities, and contact information),
- Communication and data management protocols (written and verbal),
- SOW,
- List of project deliverables,
- Project schedule (in MS Project),
- Project budget by component,
- Work Breakdown Structure (WBS) (see Section 1.3), and
- QAQC procedures including the review process for all tasks and deliverables.

1.3. Work Breakdown Structure and Schedule

The Team shall develop a detailed WBS and completion schedule (in MS Project) for all of the study tasks and subtasks to be submitted as part of the PMP. The WBS will be updated if there is a significant change in the project deliverables and/or the Team working on the specific deliverables. The schedule shall be updated regularly as agreed upon between the Team PM and the IWRB PM.

1.4. Project Management Meetings, Invoicing, and Progress Reports

The Team PM shall coordinate monthly project management meetings (via teleconference if necessary) with the IWRB PM to discuss project progress, project schedule, action items, upcoming milestones, and invoices. The Team shall be responsible for supplying meeting minutes and preparing monthly invoices. Invoices shall include a breakdown of individual staff time applied to the project and associated work description, labor hours and costs, other direct costs, and sub-consultant costs.

2. Scope of Work Task

The SOW outlines the minimum requirements for this project. For all SOW tasks, the Team will develop a Work Plan outlining the methodology, assumptions, data requirements, resource requirements (including staff expertise and hours), work to be accomplished, and schedule for conducting the analysis. The Work Plan will also include:

- A summary of data to be used in the analysis,
- Sources of data to be used in the analysis, and
- Methodology for conducting the analysis.

All Work Plans will be reviewed and approved by the IWRB PM prior to commencing task work to ensure the plans meet IWRB requirements.

For all tasks, the Team will be accountable for acquiring and compiling the necessary data. The Team will utilize existing data unless authorized by the IWRB PM.

2.1. Analysis of Water Availability for Managed Recharge

The Team will conduct a water availability analysis that determines the potential sources of water available for managed recharge within the study area. Potential source waters will minimally include surface water and reuse or treated wastewater. The analysis will include an assessment of the volume of water available for recharge taking into account the timing and location. This analysis must also take into account the timing and magnitude of the physical supply in relation to water right priorities. This analysis will require an understanding of the prior appropriation doctrine, Boise River basin reservoir operations, and the hydrogeology of the TV.

2.1.1. Work Plan

The Work Plan for this task will need to incorporate the following assumptions:

- Estimates of surface water availability and location for managed recharge based on historical records of surplus water subject to regulatory and environmental constraints,
- Estimates of reuse availability and location based on best available data including historical records, projections, and the volume of reuse per capita for the individual producers of reuse water within the TV, and
- Estimates of any other potential sources of water available for managed recharge.

2.1.2. Data Compilation and Analysis

Minimally, this task will include compilation and analysis of data for potential sources of water to recharge including but not necessarily limited to study area surface water and reuse water. For surface water data, an analysis of historical trends (approximately 30 years) should be used to determine the timing, volume, and location of available water. The Team will also provide an assessment of future data collection that would improve the analysis if any.

2.1.3. Water Availability Analyses

The Team will analyze the available data to determine the volume, timing, and location of water that could be used for managed recharge. The administration of current water rights in the TV will be addressed in determining the availability of water.

2.2. Managed Recharge Physical Feasibility Analysis

The Team will analyze the study area to determine the physical feasibility of conducting managed recharge. The analysis will distinguish areas within the TV that have similar physical characteristics concerning managed recharge.

The Team will develop a methodology for ranking areas within the study area with respect to managed recharge potential. The analysis shall include, but is not limited to, consideration of the following physical factors:

- Depth to groundwater,
- Characterization of the vadose zone,
- Infiltration rate,
- Aquifer hydraulic conductivity,
- Aquifer boundary conditions,
- Aquifer capacity,
- Retention time of recharged water in the aquifer, and
- Other pertinent geological factors.

The analysis of the areas will also include an assessment of other factors that could potentially impact the viability of managed recharge such as:

- Increased landslide risk,
- Impacts to shallow and deep aquifers,
- Impacts on groundwater quality,
- Impacts on subsurface structures such as basements, foundations, and underground storage tanks, and
- Land use.

This analysis will require an understanding of managed recharge, hydrogeology, surface water/groundwater interaction, and aquifers within the TV.

2.2.1. Work Plan

The Work Plan will need to incorporate the following assumptions:

- Using available data at the time of the Study, and
- A minimum of six (6) areas (more is acceptable) will be used to distinguish the physical managed recharge feasibility of the study area.

2.2.2. Data Compilation

Minimally, this task will include compiling data necessary to determine/estimate the hydraulic properties that would significantly impact managed recharge projects and the recharge water retention time in the aquifer. The Team will also provide an assessment of future data needs that would improve the analysis if any.

2.2.3. Managed Recharge Feasibility Analyses

The Team will analyze the available data to assess the physical capacity of the TV to conduct managed recharge. The analyses will identify and rank areas/zones of managed recharge potential based minimally on hydraulic properties, depth to groundwater, estimated recharge water retention time, and potential infiltration rates. The area's ranking should also include other factors that could impact/effect potential managed recharge projects. The analyses will take into account the identification of potential perched aquifers

and how the perched aquifers could affect the movement of recharge waters down through the vadose zone. The current volume, proximity, and timing of water available for recharge should also be determined for each area.

2.3. Infrastructure Requirements to Develop Managed Recharge Areas

The Team will conduct an analysis to determine the infrastructure and associated costs that would be required to develop managed recharge projects in the highest ranking areas distinguished in Task 2.2.

2.3.1. Work Plan

The Work Plan shall incorporate the following assumptions:

- The infrastructure estimates will be conducted on a minimum of three (3) of the potential recharge areas. The specific areas will be determined in consultation with IWRB PM,
- Current infrastructure will be incorporated into the analysis where applicable,
- The volume and timing of water available for recharge outlined in Task 2.1 will be incorporated into this analysis to determine the required infrastructure improvements/development, and
- Cost estimates to develop managed recharge projects for the specified areas will take into account potential alternatives to be determined in consultation with IWRB PM.

2.3.2. Infrastructure Requirements for Managed Recharge Areas

The Team will analyze the current infrastructure within the areas identified in Task 2.2 to determine the additional improvements or new infrastructure that would be required to conduct managed recharge. The analyses will include alternatives for infrastructure development and associated cost estimates for the infrastructure alternatives per area.

3. Deliverables and Schedule Task

3.1. Technical Report

The Team shall generate draft and final technical reports of the study findings. The IWRB staff shall have at least 45 days to comment on the draft report. The draft report will be delivered in MS WORD with complete data appendices. Appendix data may be presented in MS Excel, Adobe PDF, or other agreed upon formats.

The final report will be delivered in Adobe PDF. Deadlines for submittal of the study findings shall be coordinated with IWRB staff based on the agreed upon study schedule per Task 1.2.

The report shall include:

1. Results of the recharge water availability analysis:
 - a. Summary of the volume, time of year, and location within the TV
 - b. A summary of the data used in the analysis
 - c. Historic Trends
 - d. Constraints on the use of surplus water for managed recharge:
 - i. Water Rights

- ii. Environmental
 - iii. Other
- 2. The TV divided into areas/zones of similar managed recharge potential:
 - a. Assumption/methodology used to determine the areas
 - b. A map showing the areas.
 - c. A summary of the data used in the analysis (all data will be provided to IWRB in an acceptable format)
 - d. Expected/estimated recharge infiltration rates per area
 - e. Estimated retention time of the water recharged per area
 - f. Analysis of the potential impact of managed recharge per area
 - i. Water quantity
 - ii. Water quality
 - iii. Potential benefits and impacts
- 3. Analysis of specified areas with the potential for developing managed recharged:
 - a. Current maximum diversion and recharge capacity for those areas
 - b. Estimated costs for developing the infrastructure required to maximize recharge in those areas

3.2. Presentation

The Team shall present preliminary and final results of the Study to the IWRB.

3.3. Deliverables

The Team shall also provide a comprehensive ESRI geodatabase (GIS) with all geospatial data georeferenced in the same datum and projection with metadata for all spatial layers. Data not provided in the geodatabase will be provided in an agreed upon electronic format with complete metadata.

FIGURE 1. TREASURE VALLEY RECHARGE STUDY AREA



**ATTACHMENT 1 - STANDARD CONTRACT PROVISIONS FOR IDAHO
WATER RESOURCE BOARD**

**STANDARD CONTRACT PROVISIONS
IDAHO WATER RESOURCE BOARD (BOARD)**

I. DEFINITIONS

- A. "Board's Project Coordinator" shall mean that person appointed by the Board to administer this Contract on behalf of the Board and the term includes, except as otherwise provided in this Contract, an authorized representative of the Board's Project Coordinator acting within the limits of his authority.
- B. "Subcontractor" shall mean one, not in the employment of any party to this Contract, who is performing all or part of those services under this Contract under contract. The terms "subcontractor" and "subcontractors" mean subcontractor(s) in any tier.
- C. "Contractor's Project Coordinator" shall mean that person appointed by the Contractor to administer this Contract on behalf of the Contractor and the term includes, except as otherwise provided in this Contract, an authorized representative of the Contractor's Project Coordinator acting within the limits of his authority.

II. PROJECT COORDINATION

- A. All communications given to a party's Project Coordinator shall be as binding as if given to the party.
- B. The Board or anyone authorized to act on its behalf, may change the Board's Project Coordinator at any time by written notice served on the Contractor. The Contractor may change its Project Coordinator by prior written notice served on the Board.
- C. The Contractor's Project Coordinator shall be the Contractor's representative for administration of this Contract and shall have full authority to act on behalf of the Contractor, unless specified otherwise in the main body of the Contract.

III. LIMITATION OF PROGRAM FUNDS

- A. The Contractor acknowledges that the Board cannot obligate funds prior to obtaining funding approval.
- B. The Board certifies that state or federal funds are presently available and authorized for expenditure to pay the portion of costs which will accrue during the current state or federal fiscal year or applicable grant period.
- C. The Contractor agrees that all obligations of the Board, including the continuance of payments under this Contract, are contingent upon the availability and continued appropriation of funds. In the event state or federal funds become unavailable as determined by the Board, the Board may immediately terminate this Contract or amend it accordingly. In

no event shall the Board be liable for any payments in excess of approved or appropriated funds available for this project.

IV. TERMINATION FOR CONVENIENCE

- A. The Board may terminate for its convenience this Contract in whole or in part. In such event, the Board shall serve a written Notice of Termination on the Contractor by deposit in the United States mail, certified mail, return receipt requested, with proper postage affixed. Notice of Termination shall be deemed served upon its receipt.
- B. The Contractor shall not incur after the date of service of the Notice of Termination any noncancellable obligations, except as authorized in the written Notice of Termination.
- C. A Notice of Termination shall be effective for professional and other services authorized in the Contract on the date of service of Notice of Termination.
- D. If a Termination for the convenience of the Board is effected, an equitable adjustment in the payments authorized in this Contract shall be made. Such adjustments shall provide for payment to the Contractor for services rendered prior to the effective date of termination of the Contract and for all noncancellable obligations incurred prior to receipt of a Notice of Termination.
- E. In the event of Termination for convenience of the Board, the Contractor shall submit a summary detailing all completed work on service required by this Contract.

V. TERMINATION FOR DEFAULT

- A. In addition to any termination of this Contract in accordance with Section IV, the Board may terminate this Contract in whole or in part because of the failure of the Contractor to fulfill its obligations. Upon receipt of such termination by the Board, the Contractor shall immediately discontinue all services affected. Oral notice of termination by the Board is effective when given, but in such a case, the Board shall confirm with written Notice of Termination by deposit in the United States mail, certified mail, return receipt requested.
- B. If a termination for default is effected, an equitable adjustment in the payments authorized in this Contract shall be made. Such adjustments shall provide for payment to the Contractor for services rendered prior to the effective date of termination of the Contract and for all noncancellable obligations incurred prior to receipt of a Notice of Termination.
- C. The rights and remedies of the Board provided in this Contract are in addition to any other rights and remedies provided by law or under this Contract.

VI. INDEMNIFICATION

Contractor shall indemnify, defend and hold harmless the Board and the State of Idaho, its officers, agents and employees from and against any and all liability, claims, damages, losses, expenses, actions, attorney fees and suits whatsoever caused by or arising out of Contractor's negligent or wrongful performance, acts or omissions under this Contract or Contractor's failure to comply with

any state or federal statute, law, regulation or rule, provided, however, that the Board shall not be relieved hereby from liability for its own negligence and that of its employees. Nothing contained herein shall be deemed to constitute a waiver of the State's sovereign immunity, which immunity is hereby expressly reserved.

VII. NO PERSONAL LIABILITY

Contractor specifically understands and agrees that in no event shall any official, officer, employee or agent of the Board and the State of Idaho be personally liable for any representation, statement, covenant, warranty or obligation contained in, or made in connection with, this Contract, express or implied.

VIII. TAXES

The Contractor, with respect to its employees and those of its subcontractors, if any, shall pay, indemnify and hold the Board and the State of Idaho harmless from the payment of all taxes and contributions imposed by federal and state laws, including social security taxes, with respect to said employees and their remunerations, including all interest and penalties payable under said laws as the result of noncompliance therewith.

IX. WORKER'S COMPENSATION INSURANCE

Unless the Contractor is exempt under the provisions of I.C. § 72-212, the Contractor warrants that it has purchased worker's compensation insurance for Contractor and all employees engaged in the performance of this Contract and shall provide the Board with a Certificate of Insurance to verify the same within 15 days of the execution of this Contract. The Contractor shall notify the Board's Project Coordinator within five (5) days of any change in the status of its worker's compensation insurance.

X. INSURANCE

Contractor shall obtain and maintain insurance at its own expense as required herein for the duration of the Contract with insurance companies properly licensed to do business in Idaho. The Contractor shall provide certificates of insurance or certified endorsements as applicable for the insurance required. All insurance, except for Workers Compensation, and Professional Liability/Errors and Omissions shall name the Board and the State of Idaho as Additional Insured. Contractor shall maintain insurance in amounts not less than the following:

1. Commercial General Liability (CGL) with a limit of not less than \$1,000,000 each occurrence, and \$1,000,000 annual aggregate, if defense is outside the limits. If defense is inside the limits, the limit must be \$2,000,000 each occurrence, and \$2,000,000 aggregate.
2. Automobile Liability including owned, non-owned, and hired liability with a limit of not less than \$1,000,000 each occurrence, and \$1,000,000 aggregate.
3. Professional liability insurance covering any damages caused by an error, omission or any negligent acts. Combined single limit per occurrence shall not be less than \$1,000,000 or the equivalent. Annual aggregate limit shall not be less than \$1,000,000.

XI. RELATIONSHIP OF THE PARTIES

- A. The parties intend to create by the terms of this Contract an independent contractor relationship between the Board and the Contractor.
- B. The parties do not intend to create by the terms of this Contract the relationship of employer and employee. Contractor's status under this Contract shall be that of an independent contractor and not that of an agent or employee of the state. Contractor shall be responsible for paying all employment-related taxes and benefits, such as federal and state income tax withholding, social security contributions, worker's compensation and unemployment insurance premiums, health and life insurance premiums, pension contributions and similar items. Contractor shall indemnify the State and hold it harmless from any and all claims for taxes (including but not limited to social security taxes), penalties, attorney fees and costs that may be made or assessed against the State arising out of Contractor's failure to pay such taxes, fees or contributions.

XII. ASSIGNMENT OF BENEFITS AND DELEGATION OF DUTIES

- A. The Contractor shall not delegate any duties under this Contract or assign any benefits, including any moneys due or to become due hereunder, without the prior written consent of the Board.
- B. In the event a delegation of duties or an assignment of benefits is approved by the Board, the Contractor shall remain responsible and agrees to bind every such delegate or assignee to comply with the terms and conditions of this Contract.

XIII. WAIVER, MODIFICATION OR AMENDMENT

No waiver, modification, or amendment of this Contract or of any covenants, conditions or limitations herein contained shall be valid unless in writing duly executed by both parties and the parties further agree that the provisions of this section may not be waived, modified, or amended except as herein set forth.

XIV. PUBLIC RECORDS

Pursuant to Idaho Code section 74-101, et seq., information or documents received from the Contractor may be open to public inspection and copying unless exempt from disclosure. The Contractor shall clearly designate individual documents as "exempt" on each page of such documents and shall indicate the basis for such exemption. The Board will not accept the marking of an entire document as exempt. In addition, the Board will not accept a legend or statement on one (1) page that all, or substantially all, of the document is exempt from disclosure. The Contractor shall indemnify and defend the Board against all liability, claims, damages, losses, expenses, actions, attorney fees and suits whatsoever for honoring such a designation or for the Contractor's failure to designate individual documents as exempt. The Contractor's failure to designate as exempt any document or portion of a document that is released by the Board shall constitute a complete waiver of any and all claims for damages caused by any such release.

XV. RIGHTS IN DATA

- A. The Contractor agrees that all data, plans, drawings, specifications, reports, operating manuals, notes and other written documents produced in the performance of this Contract or in contemplation thereof, are owned by and are for the exclusive use of the Board and are subject to the rights of the Board set forth in this section.
- B. The Board shall have the right to reproduce, publish and use all such documents or any part thereof, in any manner and for any purposes whatsoever and to authorize others to do so.
- C. The Board agrees to identify the Contractor or designate appropriate authorship, on all materials reproduced and published that are a direct product of the work performed under this Contract.

XVI. RETENTION OF RECORDS AND ACCESS TO FACILITIES, PREMISES AND RECORDS

- A. The Contractor shall establish and maintain project budget accounts and records for work and services required by this Contract in accordance with generally accepted accounting principles and practices. Records shall be retained by the Contractor throughout the term of this Contract and for a period of five (5) years following final settlement.
- B. At all reasonable times during the term of this Contract and for a period of five (5) years following final settlement, the Board, State of Idaho, and their authorized representatives shall have access at the Contractor's offices to its records related to the services performed under this Contract for the purposes of inspection, audit and copying by the Board, State of Idaho, and their authorized representatives.

XVII. ATTORNEY FEES

Notwithstanding any statute to the contrary, in the event of a legal proceeding of any kind instituted under this Contract or to obtain performance of any kind under this Contract, the prevailing party shall be awarded such additional sums as the court may adjudge for reasonable attorney fees and to pay all costs and disbursements incurred in such proceeding.

XVIII. FORCE MAJEURE

Neither party shall be liable for or deemed to be in default for any delay or failure to perform under this Contract if such delay or failure to perform results from an act of God, civil or military authority, act of war, riot, insurrection or other occurrence beyond that party's control. In such case, the intervening cause must not be caused by the party asserting it and the excused party is obligated to promptly perform in accordance with the terms of this Contract after the intervening cause ceases.

XIX. ILLEGAL ALIENS

Contractor warrants it does not knowingly hire or engage any illegal aliens or persons not authorized to work in the United States; it takes steps to verify that it does not hire or engage any

illegal aliens or persons not authorized to work in the United States; and, that any misrepresentation in this regard or any employment of persons not authorized to work in the United States constitutes a material breach of this Contract and shall be cause for termination.

XX. ENTIRE AGREEMENT

This Contract sets forth all the covenants, provisions, agreements, conditions and understandings between the parties, and there are no covenants, provisions, agreements, conditions or understandings, oral or written, between them other than are herein set forth.

XXI. SEVERABILITY

If any part of this Contract is declared invalid or becomes inoperative for any reason, such invalidity or failure shall not affect the validity and enforceability of any other provision.

XXII. NO WAIVER

The failure by one party to require performance of any provision shall not affect that party's right to require performance at any time thereafter, nor shall a waiver of any breach or default of this Contract be construed as or deemed to be a waiver of any subsequent breach or default.

XXIII. EFFECT OF SECTION HEADINGS

The section headings appearing in this Contract are not to be construed as interpretations of the text but are inserted for convenience and reference only.

XXIV. GOVERNING LAW

This Contract shall be governed as to validity, construction and performance by the laws of the State of Idaho and the parties hereto consent to the jurisdiction of the state courts of Ada County in the state of Idaho. The venue of any action brought by any parties to this Contract shall be in a State of Idaho District Court.

XXV. NOTICES

All notices shall be in writing and sent certified mail, postage prepaid, return receipt requested to:

Idaho Water Resource Board
Attn: Janet Garrett
P O Box 83720
Boise, ID 83720-0098

ATTACHMENT 2 - CERTIFICATION REGARDING DEBARMENT

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

By signing this document, the Consultant certifies to the best of their knowledge and belief that, except as noted on an attached Exception, the company:

- a. Is not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal Board or agency.
- b. Has not, within a three-year period preceding this proposal, been convicted of, or had a civil judgment rendered against it for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State, or local) transaction or contract under a public transaction; and has not violated Federal or State antitrust statutes or committed embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
- c. Is not presently indicted for, or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with, commission of any of the offenses enumerated in paragraph (b) of this certification; and
- d. Has not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

NOTE: Exceptions will not necessarily result in denial of award, but will be considered in determining Consultant responsibility. For any exception noted, indicate to whom it applies, initiating agency and dates of action. Providing false information may result in criminal prosecution or administrative sanctions.

COMPANY NAME

Signature of Responsible Party

Date

ATTACHMENT 3 - PRE-PROPOSAL CONFERENCE REGISTRATION FORM

PRE-PROPOSAL CONFERENCE REGISTRATION FORM

PRE-PROPOSAL CONFERENCE	Date: Friday, June 1, 10 AM Mountain Time
Agency: Idaho Water Resource Board	RFP #: 18-003 Title: Treasure Valley Managed Recharge Feasibility Study

Verbal Information: Questions concerning an RFP must be directed in writing to the RFP Lead in the period of time prescribed in the RFP document. Bids, Proposals, or Quotations deviating from the specifications by any means other than an authorized written addendum will be subject to rejection. The State will not be responsible for any verbal or oral information given to Teams by anyone other than an authorized purchasing official. Reliance on any verbal representation is at the Team's sole risk.

Potential Teams choosing to participate by phone in the Pre-Proposal Conference **must pre-register** by submitting this completed form, via e-mail, to the RFP Lead at IDWR.Purchasing@idwr.idaho.gov. After the RFP Lead receives your form, you will be provided with phone conferencing and meeting details. Please indicate in the appropriate column if your attendance will be by phone. Attendees are asked to register for the Pre-Proposal Conference no later than **12 PM, Mountain Time, Thursday, May 31, 2018**.

PLEASE PRINT:

Name	Company	Email Address	Phone Number	By Phone

ATTACHMENT 4 - RFP SIGNATURE SHEET



State of Idaho

Department of Water Resources

322 East Front St. Suite 648
Boise, Idaho 83702
Telephone (208) 287-4800
FAX (208) 287-6700

SIGNATURE PAGE for Use with a Submitted Request for Proposal (RFP) Response

NO LIABILITY WILL BE ASSUMED BY THE IDAHO WATER RESOURCE BOARD FOR A TEAM'S FAILURE TO OBTAIN THE ISSUED SOLICITATION ADDENDUMS IN A TIMELY MANNER FOR USE IN THE TEAM'S RESPONSE TO THIS SOLICITATION.

Mail your response package to: Water Resources
PO Box 83720
Boise, ID 83720-0098

FedEx, UPS, or other Couriers: Water Resources
322 East Front St,
STE 648
Boise, ID 83702

This RFP response is submitted in accordance with all documents and provisions of the specified RFP Number and Title provided below. By my signature I accept the conditions and requirements contained in the solicitation, including, but not limited to, the SUBMITTAL INSTRUCTIONS IN THE RFP, SCOPE OF SERVICES (TO BE NEGOTIATED UPON SUCCESSFUL SELECTION), AND STANDARD CONTRACT PROVISIONS, in effect at the time this RFP was issued, as incorporated by reference into this solicitation. As the undersigned, I certify I am authorized to sign and submit this response for the named TEAM. I further acknowledge I am responsible for reviewing and acknowledging any addendums that have been issued for this solicitation.

RFP Number: 18-003

RFP Title: Engineering Consultant Services for Treasure Valley Managed Recharge Feasibility Study

RESPONDENT (Team): _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

PHONE: _____ FAX: _____ FEIN: _____

E-Mail: _____

Signature

Date

Printed Name

Title

RETURN THIS SIGNATURE PAGE WITH YOUR PROPOSAL

ATTACHMENT 5 - TEAM REFERENCE QUESTIONNAIRE

REFERENCE'S RESPONSE TO:

RFP Number: 18-003

RFP Title: Treasure Valley Managed Recharge Feasibility Study

REFERENCE NAME (Company/Organization): _____

Team NAME (Company/Organization): _____ has submitted a Proposal to the State of Idaho Water Resource Board, to provide the following services: Consultant Services. The Team has chosen you as one of our references.

INSTRUCTIONS

1. Complete **Section I. RATING** using the Rating Scale provided.
2. Complete **Section II. GENERAL INFORMATION** (*This section is for information only and will not be scored.*)
3. Complete **Section III. ACKNOWLEDGEMENT** by manually signing and dating the document. (*Reference documents must include an actual signature.*)
4. E-mail or fax **THIS PAGE** and your completed reference document, **SECTIONS I through III** to:

RFP Lead: Janet Garrett
Purchasing Agent

E-mail: IDWR.Purchasing@idwr.idaho.gov

Fax: 208-287-6700
5. This completed document **MUST** be received no later than June 21 at 4:00 p.m. Mountain Time. Reference documents received after this time will not be considered. **References received without an actual signature will not be accepted.**
6. DO **NOT** return this document to the Team (Vendor). Please send the Questionnaire to: Administrative Assistant, IWRB, 322 East Front St., PO Box 83720, Boise ID, 83702.
7. In addition to this document, the Idaho Water Resource Board may contact references by phone or e-mail for further clarification, if necessary.

Section I. RATING

Using the Rating Scale provided below, rate the following numbered items by circling the appropriate number for each item:

Rating Scale	
Category	Score
Poor or Inadequate Performance	0
Below Average	1 – 3
Average	4 – 6
Above Average	7 - 9
Excellent	10
Not Applicable (NA)	

Circle ONE number for each of the following numbered items:

1. Rate the overall quality of the vendor's services:

10 9 8 7 6 5 4 3 2 1 0 NA

2. Rate the response time of this vendor:

10 9 8 7 6 5 4 3 2 1 0 NA

3. Rate how well the agreed upon, planned schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the vendor):*

10 9 8 7 6 5 4 3 2 1 0 NA

4. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions:

10 9 8 7 6 5 4 3 2 1 0 NA

5. Rate the knowledge of the vendor's assigned staff and their ability to accomplish duties as contracted:

10 9 8 7 6 5 4 3 2 1 0 NA

6. Rate the accuracy and timeliness of the vendor's billing and/or invoices:

10 9 8 7 6 5 4 3 2 1 0 NA

7. Rate the vendor's ability to quickly and thoroughly resolve a problem related to the services provided:

10 9 8 7 6 5 4 3 2 1 0 NA

8. Rate the vendor's flexibility in meeting business requirements:

10 9 8 7 6 5 4 3 2 1 0 NA

9. Rate the likelihood of your company/organization recommending this vendor to others in the future:

10 9 8 7 6 5 4 3 2 1 0 NA

10. Rate the likelihood of your company/organization using this vendor again in the future:

10 9 8 7 6 5 4 3 2 1 0 NA

Section II. GENERAL INFORMATION

1. Please include a brief description of the services provided by this vendor:

2. Is there anything else you'd like to tell us about this vendor that would assist in our evaluation?

3. During what time period did the vendor provide these services for your business?

Month: _____ Year: _____ to Month: _____ Year: _____

Section III. ACKNOWLEDGEMENT

I affirm to the best of my knowledge that the information I have provided is true, correct, and factual:

Signature of Reference

Date

Print Name

Title

Phone Number

E-mail address

ATTACHMENT 6 - PROJECT MANAGER REFERENCE QUESTIONNAIRE

REFERENCE'S RESPONSE TO:

RFP Number: 18-003

RFP Title: Treasure Valley Managed Recharge Feasibility Study

REFERENCE NAME (Company): _____

PROJECT MANAGER NAME (Company): _____ has submitted a Proposal to the State of Idaho Water Resource Board, to provide the following services: Consultant Services. The Project Manager (PM) has chosen you as one of our references.

INSTRUCTIONS

1. Complete **Section I. RATING** using the Rating Scale provided.
2. Complete **Section II. GENERAL INFORMATION** (*This section is for information only and will not be scored.*)
3. Complete **Section III. ACKNOWLEDGEMENT** by manually signing and dating the document. (*Reference documents must include an actual signature.*)
4. E-mail or fax **THIS PAGE** and your completed reference document, **SECTIONS I through III** to:

RFP Lead: Janet Garrett
Purchasing Agent

E-mail: IDWR.Purchasing@idwr.idaho.gov

Fax: 208-287-6700

5. This completed document **MUST** be received no later than June 21 at 4:00 p.m. Mountain Time. Reference documents received after this time will not be considered. **References received without an actual signature will not be accepted.**
6. DO **NOT** return this document to the Project Manager. Please send the Questionnaire to: Administrative Assistant, IWRB, 322 East Front St., PO Box 83720, Boise ID, 83702.
7. In addition to this document, the Idaho Water Resource Board may contact references by phone or e-mail for further clarification, if necessary.

Section I. RATING

Using the Rating Scale provided below, rate the following numbered items by circling the appropriate number for each item:

Rating Scale	
Category	Score
Poor or Inadequate Performance	0
Below Average	1 – 3
Average	4 – 6
Above Average	7 - 9
Excellent	10
Not Applicable (NA)	

Circle ONE number for each of the following numbered items:

1. Rate the overall quality of the PM’s services:

10 9 8 7 6 5 4 3 2 1 0 NA

2. Rate the response time of this PM:

10 9 8 7 6 5 4 3 2 1 0 NA

3. Rate how well the agreed upon, planned schedule was consistently met and deliverables provided on time. *(This pertains to delays under the control of the PM):*

10 9 8 7 6 5 4 3 2 1 0 NA

4. Rate the overall customer service and timeliness in responding to customer service inquiries, issues and resolutions:

10 9 8 7 6 5 4 3 2 1 0 NA

5. Rate the knowledge of the PM’s assigned staff and their ability to accomplish duties as contracted:

10 9 8 7 6 5 4 3 2 1 0 NA

6. Rate the accuracy and timeliness of the PM's billing and/or invoices:

10 9 8 7 6 5 4 3 2 1 0 NA

7. Rate the PM's ability to quickly and thoroughly resolve a problem related to the services provided:

10 9 8 7 6 5 4 3 2 1 0 NA

8. Rate the PM's flexibility in meeting business requirements:

10 9 8 7 6 5 4 3 2 1 0 NA

9. Rate the likelihood of your company/organization recommending this PM to others in the future:

10 9 8 7 6 5 4 3 2 1 0 NA

10. Rate the likelihood of your company/organization using this PM again in the future:

10 9 8 7 6 5 4 3 2 1 0 NA

11. Rate the PM's ability to deal with unexpected challenges and generate creative solutions:

10 9 8 7 6 5 4 3 2 1 0 NA

Section II. GENERAL INFORMATION

1. Please include a brief description of the services provided by this PM:

2. Is there anything else you'd like to tell us about this PM that would assist in our evaluation?

3. During what time period did the PM provide these services for your business?

Month: _____ Year: _____ to Month: _____ Year: _____

Section III. ACKNOWLEDGEMENT

I affirm to the best of my knowledge that the information I have provided is true, correct, and factual:

Signature of Reference

Date

Print Name

Title

Phone Number

E-mail address