

LAS VIRGENES MUNICIPAL WATER DISTRICT

4232 Las Virgenes Road, Calabasas, California 91302



REQUEST FOR PROPOSALS

For

***RECORDS MANAGEMENT AND
LIBRARY MANAGEMENT SERVICES***

Proposal Issue Date

May 7, 2018

Proposal Submittal Due Date

5:00 p.m. on June 8, 2018

Documents available online at:

www.lvmwd.com

LAS VIRGENES MUNICIPAL WATER DISTRICT

REQUEST FOR PROPOSALS

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I. INTRODUCTION

A. General Information

Las Virgenes Municipal Water District (District) serves the western edge of Los Angeles County including the cities of Agoura Hills, Calabasas, Hidden Hills and Westlake Village. The district occupies 122 square miles and services a population of approximately 70,000. The District provides potable water, recycled water, and sanitation (wastewater) services to its customers through three separate enterprise funds. The sanitation and recycled water services are provided through a Joint Powers Authority with the Triunfo Sanitation District.

Las Virgenes Municipal Water District is organized under the Municipal Water District Act of 1911 (California Water Code 7100). A five-member board of directors, each elected by geographic divisions, provides governance. Directors serve overlapping four-year terms, and every two years - concurrent with installation of the newly elected board – they select board officers. The board also selects a local representative from LVMWD to serve on the Board of Directors of the Metropolitan Water District of Southern California.

II. SCOPE OF SERVICES

The District is requesting proposals from an experienced consultant who is willing to perform on-site records management oversight, including the key elements of record retention and disposal, and off-site long-term records storage of active records. In particular, to work with each department to:

- a) Select records for destruction,
- b) Select records for off-site storage,
- c) Amend the records retention schedules as needed by the district and by any legal mandates,
- d) Update the file classification structure, and
- e) Maintain off-site storage.

In addition to records management, the district is looking for a consultant that will also be able to assist in maintaining the district's library. The library currently contains approximately 7,000 to 8,000 items consisting of district prepared reports, consultant prepared reports, outside books, magazines, and other information. The consultant should be knowledgeable in categorizing materials and use of recordkeeping software. Experience with Microsoft Access and InMagic software is desirable.

III. PROPOSAL REQUIREMENTS

A. General Requirements

1. Inquiries

Inquiries concerning the request for proposals **must be received in**

writing by 5:00 p.m. on Friday, May 25, 2018, to jguzman@lvmwd.com
or:

Josie Guzman
Executive Assistant/Clerk of the Board
Las Virgenes Municipal Water District
4232 Las Virgenes Road, Calabasas, CA 91302
Phone (818) 251-2123
Fax (818) 251-2149

Answers to questions received will be posted online no later than June 1, 2018, at <http://www.lvmwd.com/i-want-to-do-business-with-lvmwd/non-public-works-formal-bids>. It is the proposer's responsibility to ensure that they access and review any questions and answers posted. The District is not responsible to notify individual potential bidders of the availability of questions and answers beyond this notice.

CONTACT WITH PERSONNEL OF THE DISTRICT OTHER THAN ABOVE REGARDING THIS REQUEST FOR PROPOSALS MAY BE GROUNDS FOR ELIMINATION FROM THE SELECTION PROCESS.

2. Addenda – The District may post Addenda to the RFP online at the District's website (www.lvmwd.com). It is the potential proposer's responsibility to access any addenda and ensure that stated requirements are met.

B Submission of Proposals

The following material is required to be received by 5 p.m., June 8, 2018 for a proposing firm to be considered:

Five (5) copies of the Proposal to include the following:

1. Title Page

Title page showing the request for proposals' subject; the firm's name; the name, address and telephone number of a contact person; and the date of the proposal.

2. Table of Contents

3. Transmittal Letter

A signed letter of transmittal briefly stating the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be best qualified to perform the engagement and a statement that the proposal is a firm and irrevocable offer for 90 days.

4. Key Personnel

Describe the staffing model your firm will use to fulfill the Scope of Work. Provide resumes of all key personnel who will be assigned to the District. Any changes to the key personnel must be approved by the District prior to award.

5. References

List a minimum of three (3) references for whom comparable services were provided. Provide names and contact information as well as a summary of key results achieved.

6. Qualifications and Experience

Describe your firm's qualifications to complete this Scope of Work. Explain why your firm is the best to deliver this Scope of Work and provide examples of your firm's work.

7. Detailed proposal

The detailed proposal should follow the order in Section II – Scope of Services and should provide sufficient detail to understand how the scope will be accomplished.

8. Costs

Costs proposals must include a "Not to Exceed" amount for each item in Section II – Scope of Services as well as a breakdown of hourly rates by position that will be assigned to the District. Any cost not explicitly proposed will be ineligible for payment.

IV. EVALUATION PROCEDURES

A. Review of Proposals

Proposals submitted will be evaluated by key district personnel. The district reserves the right to retain all proposals submitted and use any idea in a proposal regardless of whether that proposal is selected.

B. Evaluation Criteria

Proposals will be evaluated using three sets of criteria. Firms meeting the mandatory criteria will have their proposal evaluated for both technical qualifications and price. The following represent the principal selection criteria which will be considered during the evaluation process.

1. Mandatory Elements

- a) The firm is licensed to practice in California.
- b) The firm has no conflict of interest with regard to any other work performed by the firm for the District.
- c) The firm adheres to the instructions in this Request for Proposals on preparing and submitting the proposal.

2. Technical Qualifications

- a) The firm's past experience and performance on comparable engagements.
- b) The quality of the firm's professional personnel to be assigned to the engagement and the quality of the firm's management support personnel to be available for technical consultation.
- c) Quality of the plan and approach to complete the Scope of Services.
- d) Demonstrated results of projects with similar Scopes of Service.

3. Costs:

Cost of completing the required Scope of Services. The District will select the firm with the highest overall ranking after considering both technical qualifications and price. For this RFP, Technical Qualifications will have a higher weight than Price.

C. Oral Presentation

During the evaluation process, the district may, at its sole discretion, request any one, all, or no firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions the district may have on a firm's proposal. Not all firms may be asked to make such oral presentations.

D. Final Selection

The District will recommend a contract to the Board based upon the recommendation of district staff reviewing the proposals.

VI. CONDITIONS GOVERNING THE REQUEST FOR PROPOSALS

A. Right to Reject Proposals

Submission of a proposal indicates acceptance by the firm of the conditions contained in this Request for Proposals unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the district and the firm selected.

The District reserves the right without prejudice to reject any or all proposals.

B. Receiving Time / Late Proposals

It is the responsibility of proposer to see that their proposal is submitted with sufficient time to be received by the district prior to the proposal closing time. Late proposals will be returned unopened to the sender. Postmarks are not accepted, all responses must be received by the District by the deadline.

C. Acceptance of Conditions Governing this RFP

Submission of a proposal constitutes acceptance of the Evaluation Factors contained in this RFP.

D. Incurring Cost

Any cost incurred by the proposer in preparation, transmittal, presentation of any proposal or material submitted in response to this RFP shall be borne solely by the proposer. Any cost incurred by the proposer for set up and demonstration or for interviews shall be borne solely by the proposer.

E. Proposer's Rights to Withdraw Proposal

Proposers will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. Any request must be submitted in writing.

F. Sub-consultants

Use of sub-consultants must be clearly explained in the proposal and identified by name. Prime consultants shall be wholly responsible for the entire performance whether or not sub-consultants are used. Substitution of sub-consultants must be approved in writing by the District.

G. Best and Final Offer

The district reserves the right to request Best and Final Offers from any or all proposers. This will be the only opportunity to amend or modify proposals based on feedback from the district. Information from competing proposals will not be disclosed to other proposers prior to submission of a Best and Final Offer.

H. Disclosure of Proposal Contents

All proposals are subject to the provisions of the California Public Records Act, California Government Code section 6250 et seq., and any information submitted with a response is a public record subject to disclosure, unless a specific exemption applies.

I. Manner of Payment

Monthly payments will be made on the basis of hours of work completed during the course of the engagement and out-of-pocket expenses incurred in accordance with the firm's cost proposal. Interim billings shall cover a period of not less than a calendar month.

J. Insurance

Proposer shall maintain such insurance as will protect it from claims under Workers' Compensation laws, and such liability insurance as will protect against claims for damages for bodily injury, including death, and damages to property in accordance with the terms of the Agreement. Coverage of which is to be no less than \$1,000,000/\$2,000,000 per occurrence/aggregate, with the District named as an additional insured.

The proposing firm must be willing and able to obtain an errors and omissions insurance policy for coverage of no less than \$1,000,000 per occurrence for the willful or negligent acts of the firm and its officers, employees and agents. Proposer shall maintain evidence of coverage in an updated form during the term of the Agreement.