

**Request for Qualifications and Proposals (RFQP) for On-Call Consulting Services
and
ADA Self-Evaluation and Transition Plan Update**

Midpeninsula Regional Open Space District
330 Distel Circle, Los Altos, CA

Issued: May 22, 2017

Mandatory pre-proposal informational meeting: May 30, 2017

Proposals Due: June 14, 2017

The Midpeninsula Regional Open Space District (District) is seeking proposals from qualified firms to provide professional services to evaluate District programs, services, activities and facilities for the Americans with Disabilities Act (ADA) compliance. This solicitation is for two purposes:

1. A District-wide ADA Self-Evaluation and Transition Plan Update, and
2. General qualification for an on-call consulting services for ADA compliance and peer review.

Applicant may submit proposals for Project #1, Project #2, or both projects. Award of one contract has no bearing on the other, except that many qualifications will overlap between the two.

About Midpeninsula Regional Open Space District

The District, located on the San Francisco Peninsula, owns and manages approximately 60,000 acres of land in 26 open space preserves. The District's purpose is to acquire, permanently protect, and restore lands forming a regional open space greenbelt. The preserves are generally kept in a natural condition in order to protect their ecological integrity and habitat, and are developed with only those basic amenities needed for low-intensity recreation. The District provides facilities that support the following public programs and activities on public preserves:

- Hiking
- Biking
- Equestrian Activities
- Dog walking
- Docent-led walks and presentations
- Volunteer activities including maintenance projects
- Special uses including permitted camping, hang gliding, a visitor center program, and special events.
Leased facilities
- Publicly noticed meetings

The facilities supporting these programs include but are not limited to paved and unpaved roads, trails, boardwalks, bridges, parking areas, administration office with public meeting room, a visitor center, staff offices, maintenance shops, interpretive and directional sign-boards, restrooms, all weather shelters, picnic areas, a number of privately leased structures such as residences and equestrian facilities, and supporting signage and informational services.

The preserves are open to the public year round and contain many diverse ecosystems including redwood, oak, and fir forests, chaparral-covered hillsides, riparian corridors, grasslands, and shore frontage along San Francisco Bay. Find out more about the District at <http://www.openspace.org>.

Objective

This Request for Qualifications and Proposals (RFQP) is being widely distributed to attract a diverse group of firms that are most suited to perform ADA compliance review work for the District. The District is seeking firms who are known for their quality of work and cost effectiveness. It is preferable that firms have successfully completed similar projects for similar public entities within similar geographic and regulatory settings.

PROJECT #1: ADA Self-Evaluation and Transition Plan Update

Project Description and Background

The District seeks professional services to assist with the development of an ADA Self-Evaluation and update to the District's Transition Plan. The self-evaluation will identify any programmatic and physical barriers limiting accessibility at the District. The Transition Plan will provide recommendations for removing barriers and complying with accessibility requirements as mandated by the ADA and State of California Access codes. The Transition Plan will provide the basis for prioritizing, budgeting, implementing, and monitoring barrier removal. A database and reporting system will be developed to aid the District in monitoring ongoing implementation progress and compliance.

Under Title II of the ADA, the District is required to have an ADA Transition Plan that identifies existing barriers limiting accessibility and describes actions that are to be taken to ensure facilities are accessible to all members of the public. In 1993, the District adopted a Transition Plan to comply with the Federal ADA regulations of 1990. Since the adoption of the 1993 plan, the District has acquired new lands, built and open new facilities and expanded programs for visitors and volunteers. A comprehensive update to the District's Transition Plan will ensure that District programs, services, activities, and facilities are accessible to the public.

The District's objectives for the consulting services awarded through this RFP are to update the District's Transition Plan to ensure accessibility to public facilities, events and programs for people with disabilities and compliance with ADA and State of California Access codes. In addition, the District seeks to identify creative solutions to removing barriers and expanding accessibility to all members of the public and District employees, volunteers and docents. The consultant's recommendations should differentiate between what is required by law and what is perhaps not required but worthy of consideration.

The development and implementation of a Self-Evaluation is required to inform the development of the Transition Plan. Development of the Transition Plan should include a process for prioritizing actions to

bring facilities and programs into compliance with the ADA guidelines and State Access codes, and a public outreach and engagement approach to engage people with disabilities in the assessment and/or Transition Plan development.

Project Scope of Work

Consultant team shall provide all services required to provide the below for the Project. The scope of work is not definitive and is intended only as a guide to illustrate the minimum project requirements. The Scope of Work is expected to include the following elements, although not necessarily in this order. Additional steps may be added as the Consultant determines appropriate action based upon their experience:

Task I: Inventory and Analysis

- Assist the District in identifying all necessary documents, materials and resources (e.g. staff, volunteers, etc.) to conduct a self-evaluation and audit process.
- Review District policies and procedures related to accessibility and state and federal plans and policies in order to determine standards for evaluation.

Task II: Needs Assessment (ADA Self-Evaluation)

- Develop the procedures and forms needed to conduct a Self-Evaluation that includes:
 - A review of all policies, practices, and procedures that govern the administration of the District's programs, services, and activities. This will include interviews with appropriate departments, including but not limited to Public Affairs, District Clerk, Visitor Services, Land & Facilities, Real Property, Planning, and Human Resources.
 - A proposed process for outreach and engagement with interested persons, including individuals with disabilities or organizations representing individuals with disabilities, to participate in the self-evaluation by submitting comments. The process may include surveys, workshops, or other outreach methods as proposed by the Consultant and agreed upon by the District.
 - A proposed process for performing compliance audits of all District facilities that provide programs, services, or activities to the public to identify noncompliant items and physical barriers. The process will include a quality assurance/quality control component.
 - Consultant shall propose a technology solution that is compatible the District's Enterprise GIS system and potentially using the Districts field collection methods to collect self-evaluation data in field.
- Present the approach to the Self-Evaluation to the Committee of the District Board of Directors and potentially full Board of Directors.
- Work with District staff that include a District Project Team to complete and implement Self-Evaluation process.
- Produce a confidential preliminary draft Self-Evaluation Report and submit to the District's General Counsel for review.
- Produce a final Self-Evaluation Report.

Task III: Comprehensive Transition Plan

- The Consultant shall produce a comprehensive ADA Transition Plan based upon guidance from District Staff and findings from the previous tasks. The plan shall include prioritization of barrier removals. The ADA Transition Plan shall include, but is not limited to, the following:
 - Methodology for evaluation of barriers and deficiencies,
 - Recommendations of remedial measures and improvements to correct barriers and deficiencies,
 - Methodology for prioritizing improvements,
 - Estimated costs for improvements,
 - Implementation phasing schedule,
 - Procedures and forms for monitoring implementation,
 - Procedures and forms for filing Requests for Accommodation,
 - Standard drawings for remediation methods

Task IV: Project Database and Maps

The Consultant shall develop a technology solution for the ADA Transition Plan that will assist the District in monitoring implementation progress and compliance for future projects and allow for mobile field collection of access barriers. These location-based barrier points must be compatible with the District's Enterprise GIS.

Task V: Project Close/Summary

- Prepare a final report and deliver it to the District's Board of Directors.
- Develop and/or update District policies and procedures
- Develop and provide staff education and training regarding ADA. Include a Board workshop presentation regarding the importance of ADA and overview of the Transition Plan for improving accessibility barriers and deficiencies.

Task VI: Key Deliverables

- GIS data and technology solution for Transition Plan;
- Templates for Preserve accessibility reports, and trail accessibility reports;
- Forms for self-evaluation assessments, ongoing monitoring of facilities, and Requests for Accommodation;
- Meeting materials, including project team meeting agendas and notes;
- Presentation materials for workshops, meetings, and Board reports;
- Materials for outreach and engagement process;
- Progress, preliminary, and final reports in electronic formats;
- Standard drawings for remediation methods;
- Assist the District in updating policies and procedures;
- Presentations to staff, the public, and the Board; and
- Other deliverables as required by the tasks above, or as proposed by the Consultant.

PROJECT #2: On-Call Consulting Services for ADA Compliance and Peer Review

Project Description

The District has need for the following on-call consulting services:

- Serve as on-call accessibility specialist for the District’s public access capital improvement and maintenance projects;
- Conduct peer review of plans and drawings that are developed by other consultants, including plan sets submitted for permitting and as-builts to confirm accessibility requirements have been incorporated into the plans;
- Provide accessible design expertise to inform the design of capital improvement and maintenance projects;
- Conduct site assessments to confirm accessibility requirements have been constructed correctly;
- Provide recommendations for remedial measures and improvements to correct barriers and deficiencies; and
- Prioritize recommendations as part of the District’s Transition Plan.

The District will compile a list of the most qualified proposers to provide on-call services for an initial contract term of two (2) years with the option for the District in its sole discretion to extend the term for up to two (2) additional years. These contracts will initially be for a not-to-exceed amount of \$50,000 per year. If these contracts are successful and funds run low, District staff will evaluate proposing contract amendments for the Board of Directors’ consideration. The number of firms selected will be dependent on the quality, and number of proposals received during this RFQP process and will range from zero (0) to three (3) total firms with the potential for more if additional firms are deemed highly qualified. These firms will work primarily with one District project lead, per work order, under the guidance of senior staff to accomplish public access projects similar to those listed on the District’s Current Projects webpage (<https://www.openspace.org/our-work/current-projects>). This list includes examples of past public access improvements and other projects completed, as well as potential future projects. Future work will be similar but not limited to these types of projects.

Project Scope of Work

For the on-call contract, the District will develop individual scopes of work on a project-by-project basis. Individual scopes of work will then be offered to the best qualified firm selected for each particular project. If two or more firms are similarly qualified, individual scopes of work may be offered on an alternating basis or based on availability to perform the work in a timely fashion.

RFQP AND CONTRACT AWARD SCHEDULE

The following is a tentative schedule that is subject to change. The District will inform all teams of changes in the schedule by fax and correspondence.

Monday, 5/22/17	RFQP Released
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Tuesday, 5/30/17 1:30 PM	FOR PROJECT #1 ONLY: Mandatory pre-proposal informational meeting (web-enabled)
Wednesday, 6/14/17	Deadline to receive Proposals, two (2) hard copies and one (1) electronic
Thursday PM, 6/22/17	Presentations by selected firms and interviews with selection committee
Wednesday, 8/9/17	FOR PROJECT #1 ONLY: Board of Directors approves award of contract
Thursday, 8/24/17	FOR PROJECT #1 ONLY: Notice to proceed

SUBMISSION REQUIREMENTS

Please keep proposals to no more than twelve (12) single-side pages, not including qualifications. Two (2) copies of each final proposal should be mailed and one (1) electronic copy emailed to:

Gretchen Lausten, Planner III
glausten@openspace.org

and

Whitney Berry, Planner II
wberry@openspace.org

The District at its sole discretion may grant an extension to all candidates if circumstances indicate that additional time is required. Responding teams should assume that the District may initiate discussions simultaneously with all respondents.

Proposal Summary

Provide a brief written statement discussing the highlights, key features, and distinguishing points of your proposal.

FOR PROJECT #1 ONLY: Proposed Approach

Provide a description of project approach, including a full description of major tasks and subtasks. Describe how the project team will work together and with the District to complete the project scope of work. Provide a work plan and schedule for the project, including the phases proposed to complete the project, project team meetings, public outreach, document preparation and presentations to the Board and its Committee. Identify any assumptions made in the development of the schedule and work plan.

Team Description

Provide a description of the team that addresses the following:

Project team structure. Provide an organizational chart or description of the individuals that will be assigned as lead and contributing members of the team, including subconsultants. Include all key project team members and explain their role and responsibility throughout the project. Identify the project team members who are the daily contacts.

Prior experience. Provide resumes and a summary of the background and specific pertinent expertise of key personnel, as well as a statement of their time commitment to the project. Include examples of the project team's previous experience with comparable projects. Examples should emphasize projects that include accessibility in the outdoor recreation areas and facilities located in natural environments. Include descriptive information such as the character of the project, the scope of involvement, location of the project, and the completion of the project. Project teams are

encouraged to include illustrations or photographs of work designed and/or developed by team members. Provide a description of the firm's method of, and experience in, controlling project costs and schedules.

References. Provide a list of at least three current references that have relevant knowledge concerning the project team's ability to manage similar projects. Names, affiliations, addresses, and current telephone numbers of all references must be provided. References relating to experience with similar types of open space and/or parks agencies are especially valuable.

Qualifications

Provide a statement of the firm's experience and qualifications, including key staff who would be committed to this project. Include examples of relevant projects that are similar in nature. Provide a brief overview and history of the firm, including location(s), number of employees, organizational structure, and number of years in business.

Professional Rates & Anticipated Project Fee in a separate, sealed envelope *

Provide a detailed estimated fee proposal that is divided by phase. The fee proposal should include all anticipated reimbursable expenses as a separate line item, the charge rates of the people who would perform the work (please identify tasks to be performed by sub-consultants), and a standard hourly rate schedule. Provide a description of the key assumptions used to calculate the project fee. If appropriate, identify cost saving strategies as well.

The On-Call fee proposal should include all rates and expenses associated with potential work. Individual task order budgets will be based on these rates.

In a separate, sealed envelope clearly identifying the proposer, provide:

- List of the professional billing rates for the team members proposed for the project;
- Anticipated fee proposal based on the hours required for the team to complete the project. Fee proposal should include the following:
 - List anticipated tasks associated with effort required to execute the scope of work & provide the deliverables described herein;
 - Indicate the personnel who will work on each task; indicate the number of hours required and fee associated with each task;
 - Highlight any proposed fee allowances or contingencies;
 - Include all anticipated reimbursable expenses.

The sealed envelopes will remain unopened until the District has ranked the proposals based on evaluation of qualifications.

* The anticipated fee proposal will be utilized to negotiate a Time and Material, Not to Exceed (T&M, NTE) contract with the most qualified proposer.

Insurance Requirements and Contract Terms

Provide a statement of the firm's acceptance of the District's insurance and standard contract terms, including indemnification requirements, or any reservations the firm has with the requirements. Please see attached Midpeninsula Regional Open Space District *Draft Agreement for Professional Services*.

SELECTION PROCESS

This Request for Qualifications and Proposals is being distributed to firms who have come to our attention based on the quality of their work, and is being posted on the District website for wider dissemination in order to elicit proposals from interested and qualified firms. Proposers may be asked to make a general presentation of their plan to a selection committee and/or attend an interview. The selection committee reserves the right to have discussions with any or all of the proposers. The District will make a recommendation to the Board of Directors for approval of the consultant contract.

Evaluation Criteria

Once the proposals are received, the selection committee may require clarification and additional information. The proposals will be evaluated according to the criteria listed and described below. The order of the criteria listed below does not reflect a hierarchy for the final selection.

1. Quality of Proposal

- Consistency with the objectives
- Demonstrating an understanding of the project
- Fulfilling proposal requirements as described in this RFP
- Overall presentation

2. Implementation Approach

- Organization, structure and responsibilities of the project team
- Proposed approach
- Proposed strategies to reduce time and costs

3. Implementation Expertise

- Proven track record, the technical ability of the team to accomplish the District's goals
- Background, qualifications, experience and expertise of the firm (including subconsultants) in similar projects
- Project Fee

The selection of the team will not be based solely on the "lowest bid." Instead, the District intends select the best overall proposal package to achieve the project goals.

STIPULATIONS

Interviews and Requests for Additional Information from the District

The District reserves the right to conduct personal interviews or require presentations of any or all proposers prior to the selection. The District reserves the right to request more detailed information from one or more proposers to provide for a reliable comparison between proposals.

Specific questions related to the RFQP must be addressed by email to the District. Answers will then be distributed to all teams. Additional and updated information will be provided to the teams via email. Please submit all requests to the contacts above.

General Stipulations

The District is not responsible for any expenses which proposers may incur in preparing and submitting the proposal. The District will not be liable for any costs incurred by the proposers that are related to the RFQP process; this includes production of the proposal, interviews/presentations, travel and accommodations. The District reserves the right to request or negotiate modifications to the proposals that are deemed appropriate. All proposals received from proposers in response to this Request for Proposal will become the property of the District and will not be returned to the proposers. In the event of contract award, all documentation produced as part of the contract will become the exclusive property of the District. The District reserves the right to reject any and all proposals and to waive minor irregularities. The District also reserves the right to seek new proposals or re-advertise if responses have not been satisfactory or for any other reason.

FOR PROJECT #1 ONLY: Mandatory Pre-proposal Conference

At this time, a mandatory pre-proposal conference has been scheduled for May 30, 2017. Please RSVP to Whitney Berry, at wberry@openspace.org or at (650) 691-1200 by May 26, 2017 by 4:00PM.

Visiting the Project Site

The District owns and manages approximately 60,000 acres of land in 26 open space preserves. Most preserves are open to the public. Some preserves require a District permit to enter, and others are not open to the public. To find out more about which preserves or facilities are open to the public, please visit <http://www.openspace.org>.

Public Records and Proprietary Information, Indemnification

The District recognizes that proposers will occasionally believe that all or portions of their proposals are confidential or proprietary. This can present problems in participating in a public agency RFP process. All proposals, strategies, supporting information, rate schedules and other information and documents are presumptively public records under the California Public Records Act (Gov't Code section 6250 et seq.), subject to prompt disclosure upon request by any member of the public.

The District is not soliciting, does not wish to receive, and will not treat any information received under this proposal as proprietary or confidential information, unless specifically called for or expressly accepted by the District General Counsel in writing, and will be accepted and considered only when, in the sole discretion of the District it is necessary to serve the public purpose of the project. If the inclusion of confidential or proprietary information is determined to be necessary to the proposal, proposers must identify each and every specific item and each and every page, and segregate the information into a separate envelope or electronic file labeled conspicuously as confidential, with a cover page describing the information and applicable law exempting the same from disclosure. Any material marked or claimed as confidential or proprietary may be returned to the proposer by the District or destroyed and may not be considered in the review of proposals if the claim does not appear justified or would inhibit the public purposes of the project proposed.

If the documents have been properly marked and expressly accepted as confidential and proprietary in writing by the District General Counsel, the District will make its best effort to advise the proposer of any Public Records Act request, should any be received, seeking documents claimed to be confidential

or proprietary, to give the proposer an opportunity to take legal steps to protect such property from disclosure to third-party requester. The District expressly disclaims any duty and will not defend the confidentiality or proprietary nature of any information submitted. **By submitting any confidential or proprietary information to the District, the proposer agrees to holds harmless and indemnify and defend the District and its officers, employees, and agents for any and all costs, including attorneys fees,** incurred by the District or awarded to a Public Records Act requester relating to a request for release of proposer's data should the proposer ask the information to be handled as proprietary or confidential.

List of Attachments

1. Sample Professional Services Agreement