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TEMPLETON COMMUNITY SERVICES DISTRICT

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**Request for Proposals (RFP) for
Development of a new Urban Water Management Plan for the
Templeton Community Services District**

PROPOSALS DUE BEFORE 4:00 PM ON JANUARY 26, 2023

Attention: Bettina Mayer, PE, District Engineer
420 Crocker Street, Templeton CA 93465
TLM@TempletonCSD.org

PURPOSE

The Templeton Community Services District (District) is seeking professional services from qualified consultants and consultant teams (Consultant) to develop the District's Urban Water Management Plan (UWMP) in full compliance with the California Urban Water Management Planning Act (Act), as codified in Water Code §10610 through §10657, and in accordance with the California Department of Water Resources' (DWR) 2020 Urban Water Management Plan Guidebook for Water Suppliers. The Consultant shall submit the adopted UWMP electronically using the reporting system established by the DWR.

The District has reached 3,000 service connections and is required by the Act to develop and adopt an Urban Water Management Plan. The UWMP is intended to provide the District, San Luis Obispo County (County) stakeholders, and the public, information on District water supplies, water use, water conservation programs, water shortage contingency planning, and water supply reliability under different planning scenarios. The selected Consultant shall provide the full range of services for UWMP development including, but not limited to: population and demographics data gathering, water supply and demand data gathering, review and analysis (current and forecast), water supply reliability assessment, drought risk assessment, and water shortage contingency planning (WSCP). The Consultant will be expected to coordinate with District staff on key sections of the UWMP as they are developed and may make presentations to the District Board of Directors (Board) and the public at regularly scheduled Board meeting(s). The Consultant shall also assist the District with making the required notifications to other local agencies and public hearing notifications as specified by the Act.

BACKGROUND

The Templeton Community Services District (District) is located on the Central Coast, midway between Los Angeles and San Francisco along Highway 101. The District is a multi-service special district formed on December 29, 1976. The District serves the residents and property owners within the 3.5 square mile service area with water, sewer, fire, refuse parks and recreation, lighting and drainage services.

The District currently provides water service to approximately 3,000 municipal and residential/commercial connections. The District also maintains a wastewater treatment plant serving approximately 2270 connections. The District relies on a combination of several different water sources to provide a sustainable water supply to its customers. The District's water sources include deep aquifer groundwater, shallow underflow water, and water supply augmentation through treated wastewater retrieval and importation of Nacimiento raw water. The water enters the water system through 12 wells, all located within the Templeton Subunit of the Atascadero Basin.

In 2016 the District adopted a 20% water supply buffer policy. The policy states that the District shall maintain a water supply buffer of no less than 20% of the available water portfolio and that no water units shall be released until the available supply reliability is proven. The available water supply capacity is evaluated annually as part of the water supply buffer model update. The District's water production in 2021 was 1480 ac-ft. The District has met the 20% buffer target for the last two years.

SCOPE OF SERVICES

The Scope of Services for this RFP shall involve all necessary analyses, research, development, and documentation preparation to meet the DWR mandates for the 2020 Urban Water Management Plan (UWMP). The Consultant will ultimately be responsible for writing the District's UWMP under the criteria provided by DWR in the Urban Water Management Plan Guidebook 2020 (Guidebook), and will be responsible for ensuring that the UWMP meets all requirements therein to satisfy the District's obligations under the Act. The basic services required for developing the UWMP will include, but is not limited to, data collection and analysis, write-up(s) of required sections, word processing, data presentation, preparation of report, and coordination of information with District staff, DWR, and outside agencies. The Consultant shall also assist District staff in making the required notifications to other local agencies and public hearing notifications specified by the Act.

Background technical and planning information will be made available to the Consultant to assist them in completion of the UWMP. The Consultant will be expected to work closely with the District POC to determine which info/data are adequate for development of this UWMP. The Scope of Services is comprised of the following tasks:

Task 1 – Kick-Off Meeting

The consultant shall attend a project kick-off meeting with District staff to review the scope of services, develop a detailed work plan and schedule, identify initial data needed to begin work and methods to obtain data, and establish schedule for weekly or biweekly check-in meetings (generally by phone). The kick-off meeting may be done in person or via video conference as appropriate.

Task 2 – Water Demand Projections

Water demand projections should be detailed enough to apply to the upcoming Water Master Plan and shall take into consideration:

- Population projections from 2020 census, SLO County General Plan, SLO County Housing Element, and regional planning documents, etc.
- Vacant land available for development
- Accessory Dwelling Units (ADUs) added to existing residential properties.
- Existing Water Will Serve Commitments (Outstanding Water Units)
- Development projects currently in process
- Existing wells and potential for providing water service in the future..

The consultant shall collect information and data in order to develop Water Demand Projections in 5-year increments from 2020-2045. As water demand projections are a core element of an UWMP, collecting data for this task will be the initial priority. Necessary data for this task includes:

- Demographic data (e.g. population, housing unit and employment projections, etc.) from the General Plan and related documents prepared by the County of San Luis Obispo, San Luis Obispo Council of Governments (SLOCOG), and other relevant regional or local authorities, and the 2020 U.S. Census, etc.;
- Historical and current water production data and consumption data by user class (single-family residential, multifamily residential, commercial, institutional, dedicated irrigation, fire and other) will be provided by the District. Trends in water use reduction at the District since 2000 should be analyzed and factored into the demand projection projections;
- Data to estimate impacts of the current and future water use efficiency standards, as well as the impact of on-going behavioral modification/social norming programs;
- Historical and current water savings estimates from on-going conservation and water use efficiency programs;
- Economic information including historical, current and projected rates in regards to elasticity impacts; and
- Any other information necessary or beneficial for this task.

In conjunction with District staff, present the draft water demand projections to the District’s Facilities Committee Meeting and public (in person, or via video conference).

Incorporate required changes to the demand projections based on District feedback and present a revised version of the demand projections (if necessary). Finalize the corresponding chapters of the 2020 UWMP.

Task 3: Water Shortage Contingency Plan

Working with District staff and using information supplied by the District’s hydrologist, draft the Chapters of the 2020 UWMP related to water supply reliability. Include a Water Shortage Contingency Plan (WSCP) and drought risk assessment methodology that compares available water supplies with projected water demands planning for a dry period that lasts for 5 consecutive years. Must include the new Water Shortage Demand Assessment (WSDA) procedures necessary for District staff to complete subsequent Annual Water Shortage Assessment Reports.

In conjunction with staff, present the Water Shortage Contingency Plan (WSCP) and supporting information to the Facilities Committee and the public (in person, or via video conference). Make any

necessary adjustments/revisions and finalize these chapters. (Tasks 2 and 3 may be presented at one meeting.)

Task 4- Draft Report

Identify any remaining data needs and draft the remaining required chapters of the UWMP and any supporting sections (e.g., Table of Contents, List of Tables and Figures, Acronyms and Abbreviations, References, Appendices, etc.), as well as the section on climate change impacts to supply. (Note: District staff may take individual remaining the chapters to the Board for feedback as they are developed. However, it is not anticipated that Consultant will need to attend.) The Consultant shall incorporate the checklist developed by DWR in order to assist DWR staff with their review and ensure all requirements are met.

The consultant shall send electronic copies of the draft UWMP (or notify of the UWMPs availability on-line) to 5 local water agencies and 7 other public agencies designated by District staff, and provide at least 60 days advance notification prior to the public hearing. Consultant must inform District staff of all requirements, time frames, and costs for obtaining permits from the required regulatory agencies (if any).

The consultant shall present a draft of the complete UWMP to the District's Board of Directors and the public for review.

The consultant shall provide expertise, prepare the draft and final agenda reports, assist with creation of Board Meeting presentations, and to be available to support staff and answer questions, Board of Directors meeting.

Make any necessary adjustments/revisions and finalize the UWMP.

Task 5 – Final Plan

In conjunction with District staff, the consultant shall present the final draft to the Board of Directors and the public at a public hearing.

The consultant shall provide expertise, prepare the draft and final agenda reports, assist with creation of Board Meeting presentations, and to be available to support staff and answer questions, Board of Directors meeting.

The consultant shall coordinate UWMP adoption, assuring notification requirements for public hearing; and submittal of draft UWMP to all appropriate State, local agencies and stakeholders,

After the close of the public hearing, the District Council will consider final adoption of the UWMP. Provide the District with five (5) bound copies and two electronic copies on CD of the final adopted 2020 UWMP.

The Consultant shall assure that electronic versions of the plan meet the specifications of Section 508 of the Rehabilitation Act and be fully available to people with disabilities.

Task 6 – Submittals

Following adoption of the UWMP, the consultant shall submit the plan electronically as required/requested by the DWR. The District would like to make a good faith effort to submit the Plan to the DWR within six months of the award of this contract.

The consultant shall coordinate with County and other agencies to receive the Final UWMP within 30 days of adoption.

Task 7 – Corrections

The consultant shall make any corrections identified as necessary by DWR after adoption.

Task 8- Deliverables

The Consultant shall provide to the District the following products and services as part of this project and any others the consultant deems necessary to provide a complete UWMP.

- A. Draft UWMP
 - a. The consultant shall provide expertise, assist with creation of Facilities Committee Meeting presentation, and to be available to support staff and answer questions, for one Facilities Committee meeting during the development of the draft UWMP.
 - b. One (1) hard copy sent (or notification of plan’s availability on-line) to stakeholders (5 local water agencies and 7 other public agencies) as designated by District staff;
 - b. Nine (9) printed copies submitted to the District; and
 - c. One (1) electronic version of the complete document in both pdf and Word file format.

- B. Final UWMP
 - a. Nine (9) printed copies and one (1) electronic version of the complete document in both PDF and Word file format.
 - b. The consultant shall provide expertise, prepare the draft and final agenda reports, assist with creation of Board Meeting presentations, and to be available to support staff and answer questions, for up to two (2) Board of Directors meetings.
 - c. The consultant shall coordinate UWMP adoption, assuring notification requirements for public hearing; and submittal of draft UWMP to all appropriate State, local agencies and stakeholders,
 - d. The consultant shall coordinate with appropriate State, and local agencies to receive the Final UWMP within 30 days of adoption.
 - e. The consultant shall coordinate the posting notice and submittal of the Final UWMP to the DWR.
 - f. The consultant shall make any corrections identified as necessary by DWR after adoption.

- C. Support Documentation
 - Provide to the District all supporting documentation, in electronic formats as directed by District staff, including, but not limited to, the following:
 - a. Geographic Information Systems (GIS) files;
 - b. Draft word processing files (e.g., Word documents);
 - c. Draft database and other data management files (e.g., Excel documents);
 - d. Documentation detailing any UWMP assumptions;
 - e. Documentation showing how calculations were derived;
 - f. Methodology for water supply and demand analysis;
 - g. Methodology for service area population;
 - h. Methodology for residential and non-residential growth;
 - i. Any other data and/or information necessary for development of the UWMP.

PROPOSAL REQUIREMENTS

The proposal should not exceed 10 pages excluding resumes, cover letter, dividers, front and back covers. Responses must be in the following order and must include:

- 1) Executive Summary
 - a) Include a brief overview of the specific approach proposed to meet the needs of the Templeton Community Services District. May also propose varying approaches that meet the same goal yet may save money, increase efficiencies, result in a better outcome, etc.
 - b) Summarize the contents of your firm's proposal in a clear and concise manner
- 2) Project Description
 - a) Explain the objective of the project and how you propose to accomplish the recognized goals.
 - b) Describe the services and deliverables to be provided.
 - c) Include a statement on what makes your company uniquely qualified.
- 3) Contact Information
 - a) Legal name and address of the company.
 - b) Legal form of company (partnership, corporation).
 - c) If company is wholly owned subsidiary of a "parent company," identify the "parent company."
 - d) Name, title, address and telephone number of person to contact concerning the Response Submittal.
 - e) Number of staff and the discipline/job title of each.
 - f) Sub-Consultants, if any
- 4) Organization and Experience of the Project Team
 - a) Describe proposed team organization, including identification and responsibilities of key personnel, including sub-consultants. Include only one-page resumes.
 - b) Describe the experience of the Project Manager and the experience that the proposed personnel have working on past projects as a team.
 - c) Describe project management approach to the work effort, locations where work will be done, responsibilities for coordination with SLVWD and SVWD staff, lines of communication necessary to maintain design on schedule.
 - d) Describe a proposed schedule showing all facets of work.
 - e) Describe the company's capacity to perform the work within the time limitations, considering the firm's current and planned workload and the firm's current and planned work force.
- 5) Experience and Past Performance, Including Cost and Schedule Control
 - a) Include a summary of the past experience and performance of the Project Manager on similar projects. Include the following information:
 - i) Owner, contact name and phone number
 - ii) Project size and description
 - iii) Project design budget and total dollar value of completed design
 - iv) Budgeted project design schedule and total time to design completion
 - v) Estimated construction costs and actual construction costs
 - b) Describe the company's past experience and performance on similar projects. Include the information listed above.

- 6) Creative Alternatives
 - a) Discuss any creative solutions to meet the project objectives.
- 7) Proposed Total Cost and Fee Schedules
 - a) Proposed fee must be organized into tasks, as discussed above, with appropriate further breakdown into subtasks.
 - b) Proposed fee schedule must include an estimated timeline for completion of each task and subtask.
 - c) Proposed fee will not be the sole basis of award but will be considered in evaluating the proposal.
 - d) Proposed fee must include the hourly rates of all staff that will work on the project.
- 8) Contractual Scope of Services
 - a) The Consultant will include a detailed scope of services to be provided. This must be responsive to the requested scope of work with additional detail as necessary.
 - b) The Consultant will prepare a detailed schedule showing all facets of work. Both the scope and schedule will become attachments to the contract.
 - c) The Consultant certifies that it has fully read the RFP and takes no exceptions to this RFP. If the Consultant does take exception(s) to any portion of the RFP, the specific portion of the RFP to which exception is taken shall be identified and explained.

INQUIRIES AND ADDENDA

For inquiries regarding this RFP, please contact Bettina Mayer, PE District Engineer via electronic mail at TLM@TempletonCSD.org no later than 4:00 PM on September 20, 2022. Inquiries received after that date will be disregarded. Please include the following in the subject line of the email: "Inquiry Re: 2022 UWMP Proposal." Telephonic inquiries will not be taken.

The District will issue any revisions to this RFP as addenda. The District will distribute addenda to all potential proposers. Proposers are responsible for receipt of all addenda. To this end, each proposer should contact the District to verify that he or she has received all addenda issued, if any. The District's issuance of a written addendum is the only official method whereby the District will interpret, clarify or provide additional information concerning this RFP. No oral revisions to any provision in this RFP shall be binding.

EVALUATION CRITERIA

The evaluation criteria and the respective weights that will be given to each criterion are as follows:

- 1. Project Description 20%
- 2. Organization and Experience of Project Team20%
- 3. Past Performance, Including Cost and Schedule Control 25%
- 4. Creative Alternatives 10%
- 5. Proposed Fee 15%
- 6. Overall Quality of the Proposal 10%

ACCEPTANCE OR REJECTION OF PROPOSAL

The District reserves the right to accept or reject any and all proposals. The District also reserves the right to waive any informality or irregularity in any proposal or in the bidding as deemed to be in its best interest. Additionally, the District may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP process. The District shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner by the submission of the proposal. The District reserves the right to negotiate project deliverables and associated costs.

SELECTION PROCESS AND SCHEDULE

It is anticipated that a contract will be awarded to the highest-ranking firm. However, the District reserves the right to consider other factors such as overall cost and may award contracts to any qualified applicant, regardless of the assigned rank. The District will enter into negotiations with the selected firm. If a fair and reasonable agreement cannot be reached, the District reserves the right to select an alternate firm.

The districts anticipate that the process for selection of firm and awarding of the contract will be according to the following tentative schedule:

Anticipated Schedule

Milestone	Date
RFP Issued	Wednesday, December 21, 2022
Deadline for Clarifications/Inquiries	Tuesday, January 17, 2023
Deadline for Proposal Submittal	Thursday January 26, 2023, at 4:00 PM
Award of Contract (tentative)	Tuesday, February 21, 2023
Notice to Proceed (tentative)	Wednesday, March 7, 2023

Exhibits:

- A. District Professional Services Agreement