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Request for Proposals #2020RFP-PM

Contract Support for ITRC Project Management and Meeting Support

August 19, 2019

Overview & Background

The Interstate Technology & Regulatory Council (ITRC) is a State-led coalition working to advance the use of innovative environmental technologies and approaches. ITRC develops various resources including guidance documents, fact sheets, and training that deepen technical knowledge and expedite quality regulatory decision-making. ITRC strives to provide a national perspective with members from all 50 states and the District of Columbia. More information on ITRC is available at www.itrcweb.org.

This Request for Proposal (RFP) is for multiyear contract support for overall project management for the ITRC Board of Advisors, and ITRC Teams and their Team Leaders. This RFP includes logistics, planning, coordination, scheduling, facilitating, and communications for ITRC Teams and Team Leaders to support them in cost-effectively and efficiently meeting product development goals. This Team support also involves planning 1-2 annual meetings per year with 300-400 attendees. This contract involves supporting the ITRC Board of Advisors with its strategic planning and other plans upon request.

About ITRC, ERIS, and ECOS

ITRC is a program of the Environmental Research Institute of the States (ERIS). ERIS is a 501(c) (3) organization incorporated in the District of Columbia and managed by the Environmental Council of the States (ECOS). ECOS is the national, nonprofit, nonpartisan association representing the state and territorial environmental commissioners. Its mission is to serve as a champion for states; to provide a clearinghouse of information for state environmental commissioners; to promote coordination in environmental management; and to articulate to Congress, federal agencies, and the public positions on environmental issues. ERIS issues and administers contracts on behalf of ITRC.

ITRC Teams

ITRC achieves its mission through the work of its technical teams. ITRC teams are comprised of experts from the environmental sector. The typical 50-200 member team is scheduled for two years. Program Advisors are responsible for facilitating the team's work which can include the following: fact sheet, guidance document, case study, and online technical training development. The "ITRC Team Guidance Manual" provides a detailed description of ITRC products: https://itrcweb.org/FileCabinet/GetFile?fileID=16748.

Administrative Information

- This RFP is for a time and materials contract from November 1, 2019 until December 31, 2022.
- There will be no pre-submittal conferences. Questions may be submitted to preyes@ecos.org and responses will be posted on the ITRCweb.org
- An electronic copy of the proposal must be received by **5:00 PM EST, Monday, September 16, 2019**. **Late proposals will not be accepted or evaluated.** Proposals must be emailed to preyes@ecos.org. Proposal submission confirmation will be sent via email within three business days. It is the Proposer's responsibility to follow up if a confirmation email was not received. For questions or concerns regarding email submittals please contact Patricia Reyes, ITRC Director, at office # (202) 266-4933 or cell # (202) 590-4621.
- ITRC **may** contact select Proposers to schedule a one-hour phone interview between Key Persons and ITRC leadership at a mutually convenient time. Interviews and final selection will be completed by October 10, 2019.
- All requests, questions, or other communications about this RFP must be made in writing and submitted by email to Patricia Reyes, ITRC Director, preyes@ecos.org no later than **Friday, August 30**. A response will be provided within three business days of receipt of inquiry and posted on the ITRC website. *Communications made to other ITRC, ERIS, or ECOS personnel and associates will not be allowed or recognized and may disqualify the proposal.*
- As part of the evaluation process, proposals and other information on Proposers may be shared with ECOS staff, ITRC Board of Advisors members, and ITRC Team Leaders.
- Proposer acknowledges that submission of a proposal in response to this RFP does not create a contract between the Proposer and ITRC, ERIS, or ECOS.
- Disadvantaged, veteran-owned, women-owned, and minority-owned Proposers are encouraged to apply.
- Any false or misleading statements found in the proposal will be grounds for disqualification or contract nullification, if awarded.

Proposal Requirements

Proposals that do not meet the following requirements (including page lengths) will not be evaluated. Addenda in or to the proposal other than the requirements listed here will not be considered during the evaluation.

Cover Letter/Key Persons/Proposer Information
Proposers shall submit a **one-page** cover letter on Proposer letterhead indicating the Proposer's acceptance of the terms of the RFP and commitment to the contract if awarded. The names and contact information of up to two Key Persons who shall provide the services for the extent of the contract must be listed. Providing a second Key Person is optional.

Proposer Information
1. Full legal name of the company and corporate address
2. Is your firm subject to any litigation, judgment, debarment, or suspension that would prohibit it from fulfilling the terms of the contract?
3. Are you a disadvantaged, women-owned, or minority-owned firm?
4. Current number of people employed
5. The names, addresses, and telephone numbers of two references who are familiar with the work of the key person(s) and your business.

Narrative
Proposers shall submit no more than a **two-page** narrative outlining how the capabilities of the Proposer and Key Person(s) will provide project and meeting management services for ITRC Teams as they work to produce quality and timely products, technical regulatory guidance documents and training curricula and assist the Board to achieve its mission with excellence. The narrative must address the items listed in the Required Tasks and Competencies section and must connect Proposer and key person(s) skills and experience back to the Required Tasks and Competencies. The narrative must show that the Proposer and key person(s) understand the mission and needs of ITRC as an organization.

Resume(s)
Proposers shall submit no more than **two-page** resumes of the Key Persons who shall provide the services for the extent of the contract (e.g., two pages total for one Key Person or four pages total for two Key Persons).

Pricing Information – Yearly Basis

Price Statement
A 1-page price statement that includes the labor hourly rate for key personnel and anyone else proposed for the project for each of three years starting November 1, 2019 through December 31, 2022. The base year is from November 1, 2019 to December 31, 2020. The time requirement for contract support for ITRC Teams and Board is approximately 900 hours over the course of each year, and the hours will vary from week to week. The time requirements information is provided for example only; project content, scope, and schedule may change as ITRC Teams plan work each year. Additional information on yearly time requirements is detailed in the Required Tasks and Competencies section.

The price proposed for the work for each calendar year shall include all labor, materials, and overhead for the Proposer's key person(s) indicated for the work. ITRC will provide the following items, which should not be included in the proposed price:

- ITRC provides website and general outreach and marketing support.
- ITRC provides meeting facilities, and catering required,

- ITRC provides conference call services, printing of in-person meeting materials and other such items directly related to the work.
- Travel expenses which will be reimbursed at cost with no markup, according to the ITRC Travel Policy and with prior written approval by ERIS.

Yearly meeting attendance (1-2 days each plus travel time) as described in the Required Tasks and Competencies section and includes the ITRC Annual Meeting.

Required Tasks and Competencies

The objective of this procurement is to secure a contractor to provide services to ITRC for overall project management for the ITRC Board and Teams as they work to produce quality and timely products, such as technical regulatory guidance documents and training curricula. This RFP includes logistics, planning, coordination, scheduling, facilitating, and communications for ITRC Teams and Board of Advisors so that they are able to cost-effectively and efficiently meet product development goals.

Requirements:

Proposer must show that the Proposer and Key Person(s) can complete the following tasks (please relate past experience directly to these requirements):

Meeting management
- Help develop the purpose, goals, theme, and logo for the meeting.
- Help develop the agenda for the meeting based on consultation with the ITRC Board of Advisors, ITRC staff, contractors, ITRC Team Leaders, and others.
- Develop electronic communications materials for the meetings, including designing the meeting website page with assistance from the ITRC web contractor (no programming experience necessary), logistics sheets, and other electronic communications related to the meeting.
- Assist with development of meeting information, meeting materials, videos and anything needed for a successful meeting. ITRC will pay for printing costs.
- Arrange support services for annual meetings by coordinating with the venue and meeting attendees, including determining and coordinating food, beverage, and audio-visual selections. Monitor online meeting registration. Monitor room block numbers and other requirements and report the status of these to ITRC. Circulate and receive meeting evaluation forms; summarize meeting evaluation forms after the meeting.
- Travel to select meetings as directed by ITRC. In-person meeting management includes tasks such as managing attendee check-in and registration area; ensuring meeting rooms at the venue are equipped with sufficient seating and audio-visual equipment; making sure exhibits, booths, and other display materials are set up properly; and overseeing food and beverage distribution.
- Other tasks related to meeting planning as specified by ITRC.

Project Management
- Coordinate internal training sessions and quarterly conference calls for ITRC Team Leaders and others.

- Manage communications and processes for ITRC Team Leaders. Help communicate planning, scheduling, budgeting, and project management materials to ITRC Team Leaders and others. Ensure that ITRC's processes for planning, scheduling, budgeting, and product development are adhered to. Develop and manage ITRC organizational processes such as surveys and other activities as directed by ITRC.

- Track and analyze the overall progress of ITRC Teams, communicate results and issues to other parts of ITRC and advise ITRC leadership on ways to improve the overall product development process.

- Develop presentations and communications about ITRC Teams and Team Leaders for ITRC's Board of Advisors and others.

- Assist teams with outreach and training options.

ITRC Board of Advisors
- Assist the Board of Advisors with the development and tracking of its strategic plan, annual action plans and goal accomplishments.

- Develop presentations and communications for ITRC's Board of Advisors.

- Attend ITRC Board Meetings, as needed.

General
- Maintain ITRC's Team Resources and other related webpages on the ITRC web site, including the organization of files in the team's "file cabinet" (no web design or writing of code is required).

- Proposer must be proficient in computer software such as Microsoft Office, Adobe, survey tools (e.g. Survey Monkey), and web conferencing applications (e.g. Adobe Connect).

- Proposer should be accessible during normal working hours and be responsive to telephone and e-mail messages.
- Proposer must provide its own work facilities and materials. ITRC will not provide workspace or supplies for Proposers.

Evaluation Criteria

Proposers (and their key person(s) proposed) will be evaluated on how likely they are to complete the Required Tasks and Competencies on schedule and with excellence, as well as on the "best value" of their time and materials proposed cost. Select proposers may be contacted to schedule a short phone interview between key person(s) and ITRC leadership at a mutually convenient time. Competitiveness of price will be considered, but low cost is not essential to be awarded the contract.

Acknowledgement

ERIS/ITRC reserves the right to award the contract at its sole discretion and based on any factors it chooses to consider. ECOS, ERIS, and ITRC may distribute proposals, via e-mail or otherwise,

to a committee of state employees and others who will act as reviewers. Proposals will not be shared outside of ECOS, ERIS, the ITRC Board of Advisors, and the committee of reviewers, except as required by a judicial order or other legal obligation. Some of these reviewers may be bound by their state's requirements to disclose information sent through their state's e-mail system.