



Municipality of Anchorage

Dave Bronson, Mayor
Purchasing Department

March 14, 2024
REQUEST FOR PROPOSAL
RFP 2024P014

Provide Professional Project Management Services

The Municipality of Anchorage is an equal opportunity employer.

Enclosed is pertinent information for use in preparing your proposal.

Pre-Proposal Conference:	2:00 P.M. Local Time, March 27, 2024
Site Visit:	N/A
Questions Due:	12:00 P.M. Local Time, March 28, 2024
Proposals Due:	12:00 P.M. Local Time, April 16, 2024

ONE SIGNED ORIGINAL, single sided, unbound, of your proposal must be submitted. In addition to the copy, a flash-drive containing a PDF copy of the complete proposal, including attachments must also be provided.

If applicable, the call-in phone number for Pre-Bid Conferences is 907-343-6089. Conference lines are opened 5 minutes prior to the Pre-Bid Conference times. To attend meetings in person; you may do so at 632 W. 6th Avenue, Suite 520, Anchorage, AK 99501. FOR AUXILIARY AIDS, SERVICES, OR SPECIAL MODIFICATIONS TO PARTICIPATE PLEASE CONTACT THE PURCHASING DEPARTMENT TO REQUEST REASONABLE ACCOMMODATIONS AT 907-343-4590; OR wwpur@muni.org

For further information contact Purchasing at (907) 343-4590 or email wwpur@muni.org. All correspondence should include the RFP number and title.

The Municipality of Anchorage reserves the right to reject any and all proposals and to waive any informalities in procedures.

Sincerely,

Chris Hunter
Deputy Purchasing Director

**MUNICIPALITY OF ANCHORAGE
ANCHORAGE WATER AND WASTEWATER UTILITY
Request for Proposals 2024P014**

Professional Program / Project Management Services Term Contract

Section 1 - General Information

Section 2 - Rules Governing Competition

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1.0 GENERAL INFORMATION

1.1 Purpose

The Anchorage Water and Wastewater Utility (AWWU) is soliciting proposals from qualified firms to provide professional program and project management services in the capacity of an independent Program Management Office (PMO). The role of the PMO is to provide comprehensive administration and management of a Program encompassing multiple Federally Funded special projects (henceforth referred to as the “Program”).

The Federally Funded special projects comprising the Program are focused on, but not limited to, the expansion and improvement of AWWU’s water and sewer system capabilities which exemplifies AWWU’s commitment to safeguarding the health and welfare of the public and the environment. The program will be managed concurrently but separate from AWWU’s existing Capital Improvements Program (CIP), which is dedicated to sustaining the Utility’s existing services and infrastructure. The foundational goals of the Program include increased public safety, increased public health, economic development opportunities, and support for equitable distribution of system benefits.

Recognizing the importance of enhancing, and expanding infrastructure and services in a sustainable manner, and ensuring that the Federal funds received for this project are managed to the highest possible standard, AWWU is soliciting submissions from reputable, qualified firms to provide professional program and project management services for the Program and all its constituent projects.

While the intent of the Program is to manage AWWU projects, it is also envisioned to execute projects that may include tangential economic development projects that benefit AWWU.

1.2 Background

AWWU is the largest water and wastewater utility in Alaska, serving the greater Municipality of Anchorage (MOA). The Utility serves over 400,000 Alaskans, 1.8 million tourists, and supports critical infrastructure, including Joint Base Elmendorf-Richardson, the Port of Anchorage, and the Anchorage International Airport. The service area extends from Eklutna in the north to Girdwood in the south, and encompasses over 1,600 miles of pipe, 15,000 manholes, 240 remote facilities, 13 wells, and 5 treatment plants. AWWU is structured as a singular organization with a common labor pool, comprised of two separate economic and regulated entities: the Anchorage Water Utility (AWU) and the Anchorage Wastewater Utility (ASU).

AWWU's mission is to provide safe and reliable water and wastewater services today, and into the future, safeguarding the health and welfare of the public in our community and the environment in which we live.

Toward this aim, AWWU has been granted a significant allocation of Congressionally Directed Spending (CDS) funds to support projects aimed explicitly at enhancing the health and welfare of the community. These projects will expand water for access and fire mitigation in underserved areas and expand access to clean water and sanitary sewer services to a greater portion of the Anchorage public. Though the CDS funded projects are the primary focus of the Program, AWWU will continue to pursue other grant funding opportunities and any resultant projects may be incorporated into the Program.

At a minimum, it should be anticipated that the PMO will manage projects with a net value of \$15M - \$20M per year for the duration of the PMO performance period. Based on availability of funding, it is possible that the Program could grow significantly larger after the first year of the contract. As such, the experience and qualifications of the PMO as described in Section 3 are set at a level commensurate with the management of a larger program. AWWU's intent is to have the PMO under contract early 2024.

1.3 Contract Award

AWWU will award one (1) contract for professional program/project management services under this RFP. The proposal should address the proposer's capabilities to perform all aspects of the program/project management process and substantiate the proposer's methodologies and approach to completing the requested work as described herein.

This Agreement shall be for a term of five (5) years from the Effective Date ("Term"), unless earlier terminated pursuant to this Agreement. This Agreement may be extended for two (2) additional one-year periods upon mutual consent of the parties. If the PMO has incomplete Task Orders prior to the expiration of the Term, the PMO is still obligated to complete the Task Orders regardless of whether MOA exercised any option or otherwise extended the term of this Agreement.

1.4 Questions

Any questions regarding this Request for Proposal are to be submitted in writing to:

Municipality of Anchorage
Purchasing Department

wwpur@muni.org

For ease of identification please identify the RFP number in the subject line of any correspondence.

Purchasing Office hours of operation are: 8:00 a.m. to 5:00 p.m. local time Monday through Friday, excluding Municipal holidays. All questions must be received prior to the deadline indicated on the RFP cover letter.

1.5 Preparation Costs

The Municipality will not be responsible for proposal preparation costs, nor for costs including attorney fees associated with any (administrative, judicial, or otherwise) challenge to the determination of the highest ranked Proposer and/or award of contract and/or rejection of proposal. By submitting a proposal each Proposer agrees to be bound in this respect and waives all claims to such costs and fees.

2.0 RULES GOVERNING COMPETITION

2.1 Examination of Proposals

Proposers should carefully examine the entire RFP and any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully aware of the nature of the work and the conditions likely to be encountered in performing the work.

2.2 Proposal Acceptance Period

Award of this proposal is anticipated to be announced within 45 calendar days, although all offers must be complete and irrevocable for 90 calendar days following the submission date.

2.3 Confidentiality

The content of all proposals will be kept confidential until the selection of the Contractor is publicly announced. At that time the selected proposal is open for review. After the award of the Contract, all proposals will then become public information.

2.4 Proposal Format

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on

- 1) conformance to the RFP instructions.
- 2) responsiveness to the RFP requirements.
- 3) completeness and clarity of content.

2.5 Signature Requirements

All proposals must be signed by an officer or other agent of a corporate vendor if authorized to sign contracts on its behalf; a member of a partnership; the owner of a privately-owned vendor; or other agent if properly authorized by a power of attorney

or equivalent document. Signature on the “Letter of Transmittal” (See Para 4.3.4) will meet this requirement.

Failure to sign the Proposal is grounds for rejection. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

2.6 Proposal Submission Requirements

- 2.6.1 **ONE ORIGINAL, single sided unbound, plus seven (7) complete copies** of the proposal must be received by the Municipality prior to the date and time specified in the cover letter. Copies may be bound or enclosed in folders/binders.
- 2.6.2 IN ADDITION to the copies required by paragraph 2.6.1 above, provide a flash drive containing a PDF copy of the complete proposal, including attachments.
- 2.6.3 All copies of the proposals shall be submitted in a single sealed cover which shall be plainly marked as a Request for Proposal Response with the Number and Title prominently displayed on the outside of the package.
- 2.6.4 Proposals must be delivered or mailed to:

Physical Address
Municipality of Anchorage
Purchasing Department
632 W. Sixth Avenue, Suite 520
Anchorage, AK 99501

2.7 News Releases

News releases by or on the behalf of any Proposer pertaining to the award resulting from the RFP shall not be made without prior written approval of the Municipal Purchasing Director.

2.8 Disposition of Proposals

All materials submitted in response to this RFP will become the property of the Municipality of Anchorage. One copy of the submitted material shall be retained for the official files of the Purchasing Department and will become public record after award of the Contract.

2.9 Oral Change/Interpretation

No oral change or interpretation of any provision contained in this RFP is valid whether issued at a pre-proposal conference or otherwise. Written addenda will be issued when changes, clarifications, or amendments to proposal documents are deemed necessary by the Municipality.

2.10 Modification/Withdrawal of Proposals

A Proposer may withdraw a proposal at any time prior to the final submission date by sending written notification of its withdrawal, signed by an agent authorized to represent the agency. The Proposer may thereafter submit a new proposal prior to the final submission date; or submit written modification or addition to a proposal prior

to the final submission date. Modifications offered in any other manner, oral or written will not be considered. A final proposal cannot be changed or withdrawn after the submission date, except for modifications requested by the Municipality after the date of receipt and following oral presentations.

2.11 Late Submissions

PROPOSALS NOT RECEIVED BY THE DATE AND TIME AND AT THE LOCATION SPECIFIED IN THE RFP COVER LETTER WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED.

2.12 Rejection of Proposals

The Municipality of Anchorage reserves the right to reject any or all proposals if determined to be in the best interest of the Municipality.

2.13 Equal Employment Opportunity Contract Compliance

2.13.1 Every municipal contract shall include language substantially the same as the following: "The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, national origin, ancestry, age, sex, sexual orientation, gender identity, marital status, or physical or mental disability. The contractor will comply with all laws concerning the prohibition of discrimination including, but not limited to, Title 5 and Title 7 of the Anchorage Municipal Code."

2.13.2 Every municipal contract shall state, in all solicitations or advertisements for employees to work under the contract, that all qualified applicants will receive consideration for employment without regard to race, color, religion, national origin, ancestry, age, sex, sexual orientation, gender identity, marital status, or physical or mental disability.

2.14 Confidential/Proprietary Information

The content of proposals will be kept confidential until the selection of the Contractor is announced. At that time, the selected proposal is open for review to the competing proposers only (except for information properly identified as being proprietary). After the award of the contract, all submitted proposals shall become public information except for properly identified proprietary information. If a proposer wishes individual pages, which contain actual business, proprietary information to be held confidential, each page must be marked and an explanation furnished of its proprietary nature. In addition to marking individual pages, the Proposal's Cover must also be annotated with the words "THIS PROPOSAL CONTAINS PROPRIETARY INFORMATION". "Confidential and Proprietary" information is not meant to include any information which, at the time of disclosure, is generally known by the public and/or competitors. MOA's ability to treat information submitted as confidential is limited by Anchorage Municipal Code. Proposers concerned with the confidentiality of information submitted should familiarize themselves with the following Anchorage Municipal Code provisions:

AMC 3.90 Access to Public Records
AMC 3.90.010 Policy
AMC 3.90.020 Definitions
AMC 3.90.030 Information Available to the Public
AMC 3.90.040 Exemptions for Particular Records

2.15 Federal Stipulations - Civil Rights, Debarment and Lobbying Civil Rights

The following requirements may apply to the underlying contract. This list is not exhaustive:

A. Nondiscrimination - In accordance with Title VI of the Civil Rights Act, as amended, 42 U.S.C. § 2000d, section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, section 202 of the Americans with Disabilities Act of 1990, 42 U.S.C. § 12132, and Federal transit law at 49 U.S.C. § 5332, the CONTRACTOR agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, age, or disability.

B. Equal Employment Opportunity - The following equal employment opportunity requirements apply to the underlying contract:

- i.) Race, Color, Creed, National Origin, Sex - In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal transit laws at 49 U.S.C. § 5332, the CONTRACTOR agrees to comply with all applicable equal employment opportunity requirements of U.S. Department of Labor (U.S. DOL) regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor," 41 C.F.R. Parts 60 et seq., (which implement Executive Order No. 11246, "Equal Employment Opportunity," as amended by Executive Order No. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," 42 U.S.C. § 2000e note), and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of the Project. The CONTRACTOR agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.
- ii.) Age - In accordance with section 4 of the Age Discrimination in Employment Act of 1967, as amended, 29 U.S.C. § 623 and Federal transit law at 49 U.S.C. § 5332, the CONTRACTOR agrees to refrain from discrimination against present and prospective age.
- iii.) Disabilities - In accordance with section 102 of the Americans with Disabilities Act, as amended, 42 U.S.C. § 12112, the CONTRACTOR agrees that it will

comply with the requirements of U.S. Equal Employment Opportunity Commission, "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 C.F.R. Part 1630, pertaining to employment of persons with disabilities.

Governmentwide Debarment and Suspension

By signing and submitting its bid or proposal, the offeror certifies as follows:

The certification in this clause is a material representation of fact relied upon by the Municipality. If it is later determined that the bidder or offeror knowingly rendered an erroneous certification, in addition to remedies available to the Municipality, the Federal Government may pursue available remedies, including but not limited to suspension and/or debarment. The bidder or offeror agrees to comply with the requirements of 49 CFR 29, Subpart C while this offer is valid and throughout the period of any contract that may arise from this offer.

The bidder or offeror further agrees to include a provision requiring such compliance in its lower tier covered transactions.

Lobbying Restrictions

The CONTRACTOR agrees to:

- A. Refrain from using Federal assistance funds to support lobbying,
- B. Comply and assure the compliance of each SUBCONTRACTOR at any tier, with U.S. DOT regulations, "New Restrictions on Lobbying," 49 C.F.R. Part 20, modified as necessary by 31 U.S.C. § 1352.
- C. Comply with Federal statutory provisions to the extent applicable prohibiting the use of Federal assistance funds for activities designed to influence Congress or a State legislature on legislation or appropriations, except through proper, official channels.

3.0 SCOPE OF WORK

3.1 Introduction

The successful proposer will staff, organize, maintain, and manage a Program Management Office (PMO) setup for the specific intent of the Program described in the RFP. The PMO serves as the central hub that oversees the coordination, integration, and execution of all projects within the Program. The MOA and AWWU will be the owner and signatory on all design and construction contracts bid through the PMO. The successful proposer to be selected to run the PMO will be an agent of the MOA and AWWU and will not be permitted to bid for design or construction work unless the conflict of interest can be properly mitigated as accepted by the MOA.

General Role – The primary role of the PMO will be to provide Program Planning and Administration, Program Controls, Technical Planning,

Design and Construction Administration which may include third-party technical reviews, value-engineering, acting as the Owner's Construction Representative (OCR), and overall management of the Program's constituent projects. The PMO is responsible for developing a comprehensive program management plan that outlines the scope, strategy, schedule, resource allocation, risk management, and performance metrics for all constituent projects. The PMO will also act as the critical support between AWWU leadership, stakeholders, and funding agencies – assisting in compliance with Federal, State, Municipal, and all other jurisdictional guidelines and regulations throughout the Program's lifecycle.

Location – The PMO must be physically located inside of the Municipality of Anchorage geographical area. Additionally, the PMO staff will be located at the successful proposer's place of business, or other location provided by the successful proposer's team; No MOA/AWWU facilities will be available for the PMO team's use. It is understood that certain administrative Program tasks (data entry, document control, reporting, etc.) may be performed by support personnel not at the PMO's dedicated location.

Staff – The PMO will be staffed, at a minimum, by the proposed Program/Project Managers and other Professional/Technical staff. Administrative staff, not part of the proposal, may be included as necessary to support the work of the proposed management and professional staff. The PMO must, at all times, be able to provide sufficient qualified personnel to support the demands and potential expansion of the Program.

Team Structure – The required team structure places an emphasis on merging the deep industry knowledge, capacity, and corporate depth of a well-established Prime Proposer with the focused expertise and accessibility of local sub-consultants.

The PMO should be structured as a tiered relationship between the Prime and several Anchorage based sub-consultants, wherein the Prime Proposer directs the PMO and macro-level program management, and sub-consultants perform focused project management and specific program tasks that align with their respective expertise. The preferred structure serves the dual purpose of reinforcing the PMO with diverse experts across all stages of the Program and project lifecycles, and aligning with the programmatic goals of the CDS funding - to distribute economic development opportunities within the region. It is expected that the overall workload will be distributed on a roughly 50%/50% basis between the Prime and team of Subconsultants.

Proposers are encouraged to detail their proposed structure and expected division of labor, emphasizing how they envision this tiered relationship working optimally. Firms should delineate their understanding of local nuances, the roles and competencies of local sub consultants, and their strategies for ensuring seamless integration and coordination between all parties involved. Demonstrate how the team will meet the requirements of the program with a dynamic and potentially expanding project load.

3.2 Experience and Qualifications

Prime Proposer – The prime proposer should have an extensive portfolio reflecting successful program management of high value programs, particularly those that are federally funded and/or within the water and wastewater utility sector. The Proposer should have been in business for a minimum of ten (10) years providing Program/Project Management, Planning, Design, and Construction Support services for large capital programs; and should have experience as the Prime, designated Program Manager responsible for the management of a program team on at least two (2) major infrastructure programs, with a value of \$20 million or more, within the last ten (10) years, that are similar in complexity to the AWWU Program. The prime contractor shall have maintained a consistent local presence, with an office in Anchorage, for not less than ten (10) years.

Local Sub-Consultants – Sub-consultants should demonstrate extensive experience in their respective roles within the Program, as well as a strong history of work and experience within the MOA/AWWU system. Proposers are encouraged to develop an organizational chart that depicts the team structure at both the programmatic and project levels and demonstrate the experience that sub-consultants bring to their role within the program/projects. All sub-consultants shall have maintained a consistent local presence, with an office in Anchorage or its neighboring areas, for not less than ten (10) years.

Additional Qualifications:

- The PMO shall manage the Program and all constituent projects to the standards established by the Project Management Institute (PMI) and detailed in PMI's Project Management Book of Knowledge (PMBOK).
- It is highly desirable that as many as possible of the proposed management personnel are PMI and/or Construction Specifications Institute (CSI) certified. PMI certifications include Program Management Professional (PgMP), Agile Certified Practitioner (ACP), Project Management Professional (PMP) or Certified Associate in

Project Management (CAPM). Valued CSI certifications include Construction Document Technologist (CDT), Certified Construction Contract Administrator (CCCA), and Certified Construction Specifier (CCS).

- Key proposed management personnel MUST demonstrate broad experience in managing federally funded projects as well as MOA/AWWU projects and navigation of the MOA system, including MOA Development Services, MOA Purchasing Department, and other offices and departments necessary to the realization of the various projects included in the Program.
- Technical personnel will be an integral part of the PMO team, providing technical review of Program components, planning, design review, construction inspections, and other functions as necessary. Proposed technical personnel should be Professionally Licensed in their respective disciplines. Key disciplines include Civil (water and wastewater, process, environmental, structural), Mechanical, Electrical, and Architecture.

3.3 Description of Tasks

3.3.1 Program Administration and Controls

3.3.1.1 Start Up Program Management Office

Develop PMO

Define the organizational structure of the PMO and identify PMO team staffing requirements. Identify all tasks required to set up the PMO, including program management and control systems and inclusive of all items described in this section.

Manage PMO Staff

Assist with directing, delegation, and control of work; furnish the necessary technical and support staff for the Program.

Conduct planning sessions with PMO team to coordinate the Program's activities. The plan will be developed with an emphasis on detailing the milestones and deliverables to launch the Program.

Develop Program Management Plan

Develop a Program Management Plan (PMP) for the Program. The PMP will provide a complete roadmap for all development and implementation aspects of the Program. Items should include but are not limited to the following:

- Program Goals, Drivers, Objectives and Constraints: Establish the Program's preliminary goals, drivers, objectives, and constraints. Topic items will include, but are not limited to: Permitting, engineering and operations, constructability, finance, management, procurement, public outreach, security/safety, administrative, future expansion, known site specific issues, etc.
- Roles and Responsibilities: Develop a functional organizational structure. Develop Decision Making and Issue Resolution Procedures: Establish a decision escalation chart identifying levels, types of decisions, resolution timelines, and procedures to resolve conflicting issues. The anticipated result of the decision escalation chart is the delegation of decisions to the appropriate PMO level staff and the facilitation of decision-making. The process will also identify escalation procedures for moving decisions as appropriate. The goals of this task will be to define a structure and procedure for decision-making throughout all phases of the Program and to facilitate critical early decisions that have an immediate and significant impact on the Program.
- Program Controls: Develop a program controls structure and management strategy, addressing procedures, schedules, budget, accounting, cost estimating, reporting, change management, and QA/QC strategy.
- Internal Communication Plan: This section will address internal communications with applicable MOA stakeholders. This section will identify the tools, frequency, and forms of communication.
- Project Planning: The activities that are required to support project planning will be summarized and standards or other requirements will be referenced. The major topics covered in this section will include: Life Cycle Cost Analysis, Conceptual Engineering, Value Engineering, Means, Methods, and Materials Approaches, Preliminary Design Criteria, and Permitting.
- Program Implementation Procedures: This section will ultimately utilize Planning, Design, Environmental, Construction Management, Testing, Training, Acceptance, Closeout, and Post Contract Monitoring or Support Procedures.

- Owners Representative Services: Develop a plan to facilitate operational and managerial involvement in Design Review and assist in evaluating design consistency and integration with existing AWWU business practices, Standard Operating Procedures (SOPs), training procedures, and assets. Develop Operational Plans (for tie-ins and shutdowns), Commissioning support, Project Acceptance Protocol, Hand-over coordination. development of Standard Operating Procedures, Training coordination, Asset Management, Inventory Management, and integration with AWWU's Computerized Maintenance Management System (Maximo) and Geographic Information System (ESRI) data bases.
- Risk Management: The Program Management consultant will develop this section with input from AWWU, including: Program Level Risk Analysis and Management, Risk Management Approach and Methodology, Project Level Risk Management, Permit Risk, and Operational Risk.
- Administration: Filing Systems, Information and Document Management, Records Archives, and Photography.
- Construction Support: This section will describe the interface of PMO, AWWU staff, project design team, and project construction contractor. Also include descriptions of constructability review, construction optimization evaluation, value engineering, pre-purchasing protocol, responsibilities, construction schedule development and management, contract administration, Owner's Construction Representative services (OCR), and inspection support services.
- Outreach: This section will describe the development of a Communication Plan for the Program to educate all stakeholders and keep them informed of the progress of the Program and various projects. This may include, but is not limited to, the Mayor's Office, Assembly, various Community Councils, Municipal, State, and Federal Stakeholders.

Implement Change Management System

Implement a program change management system to track changes to the program scope, budget, and schedule. The system will be used to track all changes to consultant contracts.

Implement Cost Control Plan

Implement a Cost Control Plan outlining the processes to be used to maintain financial control of projects from initiation to completion using Earned Value Management, PMI Cost Management, or other approved method.

Procurement Support

Provide support developing ITBs, RFPs, coordination of Selection Committees, interface with the MOA Purchasing Department, and other activities as required.

3.3.1.2 Program / Project Controls

Prepare cash flow projections for the Program's progress. Develop a master schedule for the Program and maintain it as a project progresses through all activities associated with the Program. Develop a program controls system to track budget, schedule, and document management. The system may be integrated with AWWU's existing document management system. The information shall be updated on a monthly basis.

Master Program Schedule

Develop and maintain a Master Program schedule in a computerized Critical Path Method (CPM) format utilizing professional software (e.g. Primavera P6 or Microsoft Projects) and containing necessary program-level and individual project-level activities as required.

Monitor Cost/Cash Flow

Develop a Program master cost baseline, maintain budgets and cost projections, and report monthly on the overall actual and anticipated cost of the entire Program. Produce cash flow projections, budget reports, and develop a Program cost estimating manual.

Utilize an Earned Value Management System (EVMS) to measure real value of work performed on a project. Use Earned Value to inform status reports on the Program and constituent projects.

Independent/3rd Party Cost Estimates

Provide independent construction cost estimates at design submittal phases for all projects.

Prepare Status Reports

Progress reports will be used as an informational tool for senior management, a management tool for managers, and status reports to staff and others. Reports will be utilized to inform program and project decision-making.

Reports will be scheduled monthly and tailored to provide relevant information to critical stakeholders and AWWU management. Reports will contain an executive summary of program progress, Earned Value, schedule, tasks, highlight of potential short/mid-term risks, and specifics on the design and construction progress.

Document Management

Provide and maintain an electronic document management system. Documents generated by the Program may initially be stored in the selected document management system for the PMO, but a process must be developed defining how and when to transfer the information into the AWWU's system. Documents generated by the Program will ultimately be stored in the AWWU's electronic content management system. Additional tasks for document management include:

- Identify an appropriate software system, compatible with the AWWU infrastructure, to incorporate the MOA's record retention policy requirements when setting up the file systems that will be used by the PMO.
- Provide staff, for the duration of the contract, to oversee reports, plans, and details of all pertinent documentation, and ensure AWWU maintains custody of hard copies. Documentation indexes will be organized and each document shall be numbered.
- Create document management guidelines.

Contract Management

Administer the contracts identified under this Program (e.g., design services, construction contracts), including but not limited to the following tasks:

- Establish a standard invoice summary and approval process.
- Identify changes in scope of work for approval. Assist in preparing amendments.
- Provide RFI, Change Management, and claim assistance services.
- Review invoices for consultants and contractors. Construction invoices will be processed via the construction process.
- Submit monthly invoices.

Risk Management

Develop a risk management plan to manage Program risks.

- Develop program and project level risk management plans for the preparation and maintenance of a risk register for the Program, identifying all programmatic and project related risks, (e.g. schedule, cost, escalation, market conditions) associated with the Program, risk mitigating strategies, likelihood of failure, and cost of each level of risk.
- Develop and implement the process and tools for the identification of program and project risks and opportunities. Each project will be evaluated for specific risks and opportunities (equipment delivery, limited shutdowns, permit compliance, market and supply chain risk, etc.). A risk register will be developed for each project that includes: identification of risks and opportunities, calculation of impacts, and approach to mitigation.

3.3.1.3 Program/Project Quality

Quality Assurance/Quality Control

Prepare a QA/QC Plan that describes the anticipated steps and requirements.

- Provide quality assurance services to ensure that the procedures and program plan are being implemented according to the developed standards.
- Quality Assurance will be included in all phases of the Program, so that deficiencies are identified and addressed. Perform pre-scheduled and random quality assurance audits.
- Implement quality control during Planning, Design, and Construction phases.
- Prepare a quality management plan outlining all independent reviews required and specifying milestones regarding when the reviews are to take place.

3.3.1.4 Program/Project Safety

Prepare a Health and Safety Plan for the Program. Identify and implement appropriate training and compliance reporting. The PMO

will coordinate with AWWU Safety Officer as necessary to ensure that all AWWU concerns are addressed. Additional tasks include:

- Provide risk and regulatory compliance assessments and inspect worksites, buildings, grounds, equipment, and tools for compliance with safety standards, ordinances, laws, and practices.
- Recommend corrective actions to identify situations which are clearly or potentially unsafe and contrary to applicable laws. Conduct follow-up inspections to verify compliance.
- Provide guidance and instruction to inspectors and consultant staff on safety and security related issues.
- Develop an appropriate syllabus (covering key safety subjects) and provide training for staff and consultants on accident prevention methods and the elimination of unsafe acts and working conditions.
- Be familiar with relevant safety and health legislation that affects the types of Construction work being carried out.
- Review contractors' proposed methods and safeguards for conformance with special provisions, standards, laws, etc.
- Work with contractors to familiarize them with applicable safety standards, ordinances, laws, and practices.
- Review safety documents including, but not limited to, safety manuals, traffic control plans, trench shoring submittals, ground protection submittals for tunneling, hazardous materials submittals, access requests, and other submittals relating to safety.

3.3.1.5 Administrative Support

Communications and Reporting Support

Facilitate the development of Program communications strategies and standards. Communications Support will include reports, presentations, and communication materials.

- Serve as the primary point of contact for program-related inquiries and communications from internal and external stakeholders.
- Draft, review, and disseminate official correspondence,

announcements, and reports.

- Maintain regular communication channels to keep stakeholders informed about program progress, milestones, and changes.

General Administrative Support

Provide administrative support personnel and services required for the various functions within the Program.

- Coordinate and schedule meetings, workshops, and other program-related gatherings, ensuring optimal participation from stakeholders.
- Prepare and distribute meeting agendas, materials, and presentations in advance of scheduled meetings.
- Facilitate meetings, maintain attendance logs and contact information, record minutes, and track action items, decisions, and follow-up tasks.
- Maintain a log of all presentation materials.

Document and Records Management

- Maintain accurate and up-to-date documentation for all program-related activities, including project plans, progress reports, meeting minutes, and correspondence.
- Develop a robust records management system that organizes and indexes all documentation for easy retrieval and reference.
- Ensure compliance with applicable regulations and guidelines governing records retention and confidentiality.

3.3.2 Planning and Engineering Support

AWWU will typically utilize a Design-Bid-Build (D/B/B) project delivery method for projects contained within the Program. The PMO will support the D/B/B process by facilitating planning and engineering support throughout the entire project lifecycle from the development of the solicitation to contract administration.

The PMO will ensure that all standards are followed, including the AWWU Design and Construction Practices Manual (DCPM), MASS, and other standards as applicable.

Planning and engineering support includes, but is not limited to, the following tasks:

- **Design Support:** The PMO will assist in developing clear project objectives and gathering detailed requirements from stakeholders to ensure the design phase is guided by well-understood needs and expectations. The PMO will facilitate meetings and workshops, bringing together design teams, technical personnel, AWWU end users, and other critical stakeholders. These sessions will aim to establish design concepts, gather feedback, and ensure alignment with stakeholder needs and expectations. Reviews will include constructability, startup, and testing plan reviews. Reviews will be coordinated to ensure that standards and asset management principles are followed.
- **Design Solicitation:** Compile solicitation in accordance with standard MOA format assemble evaluation committees, interface with Municipal purchasing during the solicitation process, compile addenda as required, participate in negotiations with design team in development of final scope and fee. Assist municipal purchasing in compilation of the final design contract document.
- **Design Management:** Experienced engineering personnel to work alongside the design teams. These engineers will provide technical expertise, clarify AWWU standards, and offer guidance to ensure the design is both innovative and feasible.
- **Facilitate Technical/Peer Reviews (as required):** The PMO will coordinate design efforts to ensure alignment with project requirements. Regular design review sessions will be conducted to evaluate the progression, ensuring compliance with standards, budgets, and timeframes.
- **Integration of Stakeholder Feedback:** Throughout the D/B/B process, the PMO will act as a conduit for feedback from AWWU end users and other stakeholders. This ensures that the final build aligns closely with owner requirements and stakeholder expectations.

3.3.1 Construction Support

3.3.3.1 Construction Program Management

- Provide overall coordination of all construction support (CS) services and contracts.
- Prepare Construction Support Guidelines
- Provide program-level coordination to mitigate service impacts.
- Solicitation Management: The PMO will oversee the bid solicitation process. This includes preparing clear and comprehensive bid documents, managing the bid advertisement process, organizing pre-bid meetings, addressing queries from prospective bidders, and assisting in the evaluation and selection of the most qualified contractor.
- Project Controls: Implement project controls inclusive of all items described in section 3.3.1.2

3.3.3.2 Owner's Construction Representative Services and Inspection Support

Owner's Construction Representative (OCR) Services

- Project Oversight: The OCR services will provide consistent and knowledgeable oversight of all construction activities to ensure alignment with the approved designs, specifications, and regulatory requirements.
- Communication: The OCR will act as the point of contact between the MOA and AWWU, contractors, design team members, and project stakeholders. Facilitate regular communication and coordination meetings to ensure smooth progress and timely resolution of issues.
- Issue Management: Identify, document, and facilitate the resolution of any on-site issues or discrepancies between construction activities and project plans or specifications.
- Change Management: Oversee and assess any proposed changes to the construction plan. Ensure that change orders are in line with project objectives, budget, and timeline and get the necessary approvals. Negotiate change orders on behalf of the MOA and AWWU.

- Compliance and Reporting: Ensure contractor adherence to all local, state, and federal requirements detailed in the project contract and specifications.
- Conduct site walkthroughs and provide regularly scheduled status reports to the MOA and AWWU leadership and project stakeholders detailing progress, issues, and resolutions.

Inspection Support

- Quality Assurance: Deploy inspectors to monitor the quality of construction work, ensuring that it adheres to MOA and AWWU's quality standards, specifications approved plans, and applicable regulations.
- Safety Oversight: Monitor the construction site for adherence to safety standards and practices, ensuring the safety of both the construction team and the public.
- Document Verification: Validate that materials and processes used are in line with what is stated in the contract and project plans. Cross-verify delivery slips, material receipts, batch tickets, and other pertinent documents as needed.
- Testing & Verification: Oversee required special inspections are performed (e.g., compaction, material strength, weld test) to ensure that construction outputs meet the required standards. Facilitate punch lists and construction reviews from design professionals as needed during the project.
- Final Inspection & Handover: Conduct a detailed final inspection upon construction completion, ensuring standards, specifications, and design intent have been met by the contractor. Facilitate the official handover of the construction site to AWWU and compile project closeout documentation.

Deliverables

- Daily progress/inspection reports including photographs, issues logs, and change order documentation.
- Final handover report, including all test results, verification documents, and a comprehensive assessment of the construction against the original design and standards.

3.3.2 Outreach and Communication

General Outreach Support for the Program

- **Strategy Development:** Collaborate with AWWU's internal communications team to formulate an overarching public outreach strategy for the Program, ensuring consistent messaging, clarity of information, and adaptability in the face of changing circumstances.
- **Content Creation:** Assist in developing clear, accessible, and timely content tailored for diverse audiences as required. This may include printed materials, website content, social media posts, and visual media like infographics or videos.

Specific Project-based Outreach

- **Targeted Communications:** Depending on the project's nature and its impact on the community, devise tailored communication strategies that address project-specific concerns, milestones, and developments.
- **Stakeholder Engagement:** Identify and engage with key stakeholders specific to each project. This includes community leaders, local businesses, residents, and other entities that may be directly affected by the project.
- **Feedback Mechanism:** Implement mechanisms to gather feedback from the public regarding specific projects, ensuring that community voices are heard and their concerns are addressed in real-time.
- **Reporting:** Regularly update AWWU's internal communications team about public sentiment, feedback, and areas of concern or interest. Offer data-driven insights to refine ongoing outreach efforts.

3.4 Performance Period

The period of performance under this Contact is five years beginning approximately April 1, 2024, with an option to renew for two additional one-year periods by mutual consent of both parties.

The successful proposer will not be eligible to provide study, design, construction, or other services on any portion of the projects for which they provide program/project management services.

3.5 Contract Task Order (CTO) Assignments

This is a Task Order based Term Contract. Each specific Contract Task Order (CTO) will be negotiated as to scope and fee and the Notice-to-Proceed will be made a binding part of the Term Contract. The Notice-to-Proceed will state the scope of the work, maximum fee allowable, and CTO start and completion dates.

It is intended that the selected proposers will perform several CTOs during the contract period. However, AWWU does not guarantee any minimum amount to be paid under the Term Contract. AWWU does not guarantee a minimum fee. Notice-to-proceed for each project is subject to availability of funding for that project.

4.0 PROPOSAL AND SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified below. Proposals shall not exceed fifteen (15) pages in length (excluding letter of transmittal, resumes, title page(s), index/table of contents, required attachments, or dividers). One page shall be interpreted as one side of a single-spaced, letter size sheet (8-1/2" X 11"). Excess pages will be removed prior to evaluation, which could result in incomplete responses and lower scores.

4.1 Title Page

Include the RFP number and subject, the name of your firm, address, telephone number(s), name of contact person, contact information (phone number, email address), and date.

4.2 Table of Contents

List the proposal's sections with page numbers. Include the RFP Evaluation Criteria.

4.3 Letter of Transmittal (Limited to one (1) page).

- 4.3.1 Briefly state your firm's understanding of the services to be performed and make a positive commitment to provide the services as specified.

- 4.3.2 List your company's contact for this RFP along with their phone number and email address on the proposal cover page.
- 4.3.3 Provide the name(s) of the person(s) who are authorized to make representations for your firm, their titles, address, email, and telephone numbers.
- 4.3.4 **The letter of transmittal must be signed by a corporate officer or other individual who has the authority to bind the firm.**

4.4 Evaluation Criteria

4.4.1 Prime Firm Qualifications and Experience

Discuss the Prime firm's qualifications and experience as Program Manager for similar high-value Programs. Demonstrate how the firm meets or exceeds the minimum qualifications described in Section 3.2 of the RFP. Provide examples of similar programs that the firm has managed in terms of scale, value, and the water and wastewater sector. Provide examples of specific experience and past performance on MOA and AWWU projects. Discuss experience related to the management of Federally funded programs and any specific systems or reporting that the firm may have implemented to ensure compliance with the Federal Agencies through which funding was provided. Provide a list of federally funded projects by project name, the federal funding agencies, the project start and completion years, and the contract value.

All respondents shall provide a reference list of no less than three (3) former clients with the name of the contact person and a current phone number where they may be reached for verification of experience and qualifications.

4.4.2 Subconsultant Firm Qualifications and Experience

Discuss the Subconsultant Team, and the respective roles of each team member firm. Demonstrate each firm's qualifications and experience as program/project managers, experience working within the MOA and AWWU systems, and past performance on specific Municipal and AWWU projects. Also discuss experience related to the management of Federally funded projects and compliance with various Federal Agency stipulations related to those projects. Provide a list of federally funded projects by project name, the federal funding agencies, the project start and completion years, and the contract value.

Provide a reference list of no less than three (3) former clients with the name of the contact person and a current phone number where they may be reached for verification of experience and qualifications for each proposed subconsultant team firm.

4.4.3 Management Team

Identify the Primary Program Manager who will oversee the Program and act as the key point of contact with AWWU. Also identify any other proposed program management personnel including assistant program managers and personnel critical to the major scope items identified in Section 3.3. Identify a minimum of five (5) Project Managers that are proposed for the project. Demonstrate the specific qualifications and experience of each major Program Management team member and each Project Manager as relates to programs/projects of similar scale, value, and the water and wastewater sector. Discuss each team member's experience and past performance on any MOA/AWWU projects. Identify any certifications and special training the team members may have, and any certification/training programs that the Firm/Team may have in place to promote and achieve the certification of team members and staff.

Discuss the organizational hierarchy of the entire Team and the intra-team communications and reporting structure. Provide an organization chart of the Team as an Attachment to the proposal.

Include resumes for all personnel and subconsultants to be assigned to this project.

4.4.4 Methodology and Approach

Demonstrate the firm's understanding of the project requirements, providing the methodology, approach, and structure of the PMO. Describe how the PMO will function both internally, as a cohesive, integrated team, and externally with respect to management of the individual projects and interface with stakeholders outside of the PMO staff.

Describe the systems that will be in place to track the overall Program and constituent projects. Provide detail on how critical items such as budget, schedule, quality control, earned value, and overall performance will be measured, managed, maintained, and reported upon.

4.4.5 Cost Control Plan

Describe the approach and methodology that will be used to control Program and project costs. Provide a sample cost control plan.

4.4.6 Firm Resources

Discuss the firm and personnel resources available to the Program/Project Manager(s). Discuss equipment and other resources available to the Program/Project Manager(s); particularly any collaborative program management systems that the firm has in place. Discuss the firm's current workload and size and ability to expand and redirect personnel and resources should the Program expand over the course of the contract.

4.4.5 Management Team

4.4.7 Contractor Location

Discuss the intended location of the PMO where the primary services are to be provided and the ability to meet in person with AWWU personnel when required during the performance of the contract.

4.5 Fee Schedule

A Fee Schedule is not required with the proposal as it will not be used in the evaluation. After proposals are evaluated and scored, the highest rated Proposer will be required to provide a fee schedule to show direct labor rates, indirect labor rates, (General and Administrative (G&A) expense; overhead, fringe benefits, insurance, etc.), and proposed profit in a tabular format for the personnel to be utilized on this contract.

Payments for Other Direct Costs (EXPENSES) will be made for actual substantiated costs that are directly chargeable to and necessary for performance of services assuming they are not recovered through the Indirect Cost Rate. "Markup" of Expenses is prohibited. This does not include mark-up on subconsultants, which will be negotiated and treated as a fixed fee.

After contract negotiations are complete, the selected contractor will provide a fully loaded fee schedule for all services required for the performance of the work. This fee schedule shall be inclusive of all direct labor rates, overhead, G&A, insurance, fringe benefits, profit, etc. This Fee Schedule will become an appendix to the contract, which will become public information.

5.0 EVALUATION CRITERIA AND PROCESS

5.1 Evaluation Criteria Weighting

The criteria to consider during evaluations, and the associated point values, are as follows:

1. Prime Firm Qualifications and Experience	15 points
2. Subconsultant Firm Qualifications and Experience	15 points
3. Management Team	25 points
4. Methodology and Approach	10 points
5. Cost Control Plan	15 points
6. Firm Resources	10 points
<u>7. Contractor Location</u>	<u>10 points</u>
Total Points Available	100 points

5.2 Qualitative Evaluation Criterion

Firms will be ranked using the following qualitative rating factors for each RFP criterion:

- 1.0 Outstanding
- 0.8 Excellent
- 0.6 Good
- 0.4 Fair
- 0.2 Poor
- 0- Unsatisfactory

The rating factor for each criteria category will be multiplied against the points available to determine the total points for that category.

EXAMPLE: If an evaluator decides that the response provided for a criterion that has a maximum of 30 points was “Good,” they will assign a “qualitative rating factor” of 0.6 to that criterion. The qualitative rating factor is then multiplied by the maximum points available (30) for a resultant 18 points.

5.3 Evaluation Process

A committee of individuals representing the Municipality of Anchorage will perform an evaluation of the proposal(s). The committee will score the proposal(s) as submitted. The Municipality of Anchorage reserves the right to award a contract solely on the written proposal.

The Municipality also reserves the right to request oral interviews with the highest ranked firms (short list). The purpose of the interviews with the highest ranked firms is to allow expansion on the written responses. If interviews are conducted, a maximum of two (2) firms will be short-listed. A second score sheet will be used to score those firms interviewed. The final selection will be based on a combination of written proposals and interviews. The same categories and point ranges will be used during the second evaluation as for the first. The highest ranked Proposer after the second scoring, if performed, may be invited to enter into final negotiations with the Municipality for the purposes of contract award.

6.0 SELECTION PROCESS

The Proposer with the highest total evaluation points may be invited to enter into contract negotiations with the Municipality of Anchorage. If an agreement cannot be reached, the second highest Proposer may be contacted for negotiations. This process may continue until successful negotiations are achieved. However, the Municipality reserves the right to terminate negotiations with any Proposer should it be in the Municipality's best interest. The Municipality of Anchorage reserves the right to reject any and all proposals submitted.

7.0 SAMPLE CONTRACT

All Proposers must carefully read and review ATTACHMENT 1 - Sample Contract. The final Contract with the Municipality of Anchorage will be substantially similar to it.

If a Proposer wishes to make changes to the Sample Contract, the proposed changes must be submitted with the proposal. All desired changes must be submitted in a separate document, and must be clear, legible, and conspicuous. The Proposer must also provide the rationale for all proposed changes. No changes will be considered until after the highest scored proposal(s) has been determined.

IF NO CHANGES ARE SUBMITTED WITH THE PROPOSAL, IT IS UNDERSTOOD THAT THE TERMS AND CONDITIONS OF THE SAMPLE CONTRACT HAVE BEEN ACCEPTED.

8.0 ATTACHMENTS

Attachment 1 – Sample Contract

Attachment 2 – Sampling of Federal Forms

Attached to this RFP is a sampling of federal forms that may be required for contract task orders, dependent on the funding source. This is not inclusive of all forms that may be required as each federal funding agency will have their own compliance requirements.

- *Affidavit of Non-Collusion*
- *Certification Regarding Lobbying*
- *DBE Compliance Statement, Report of Participation, Contact Documentation*
- *Certification Regarding Debarment, Suspension, and Other Responsibility Matters*