

# Local Expert Procurement Process, Plans and Templates for Basin Implementation Plan Updates

January 2020

This packet provides a process and tools for procuring a Local Experts to support basin roundtable efforts in updating their Basin Implementation Plans. The core work that must be completed (e.g. updating the actual BIPs, coordinating with roundtables) is consistent across the basins, and the following documents support that general process. However, basin roundtables have a clear role in identifying additional local expertise, helping rank and recommend local experts and, ultimately, guiding the BIP update.

The contents of the packet are described below:

## Procurement Process and Roles for Local Experts

An overview of the process for procuring a Local Expert and a high-level description of their role.

## BIP Update Framework and Overview

Guidance from the CWCB describing required content (Core Duties) for updating the BIPs.

## Timeline

Timelines for the overall BIP Update process and for the activities to be conducted in 2020.

## Anticipated Scope of Services for Local Experts

A description of the Scope of Services for Local Experts to be included in the RFQ

## RFQ Template

A template Request for Qualifications that includes a detailed description of the Local Expert selection process (based on standard practices), project background, submittal requirements, submittal timeline, budgetary information, evaluation criteria, an Anticipated Scope of Services, and a template sub-consulting agreement.

## Scoring Sheet

A sample scoring sheet for basin roundtables to use when evaluating and ranking Local Expert submittals.

# Procurement Process and Roles for Local Experts

## Introduction and Background

The purpose of this document is to provide information and guidance on procuring Local Experts (LEs) to assist basin roundtables in updating their Basin Implementation Plans (BIPs). The document includes a description of the: 1) recommended procurement process, 2) a general timeline, 3) a description of the work that the LE will be expected to conduct, and 4) a clarifying description of the budget and amount dedicated to core duties outlined by the Colorado Water Conservation Board (CWCB).

In 2018, the CWCB initiated the process for updating BIPs, and in 2019 a selection committee (comprised of roundtable chairs and CWCB staff) selected Brown and Caldwell as a general contractor (GC) to assist the CWCB and basin roundtables with the BIP and Colorado Water Plan (Water Plan) update process. With the completion of the consulting agreement in January 2020, the contract work to update the BIPs can begin.

The BIP updates will be supported by a Local Expert (LE) in each basin. The LE will support their roundtable in updating their BIP and, where applicable, the Colorado Water Plan (Water Plan). The LE will help complete the core duties of that effort including updating the BIPs, creating BIP strategy documents and BIP project lists, which comprise the bulk of the work and budget for this effort, as well as other duties described on the next page. The LE will subcontract to the GC.

## Procurement Process and Timeline

The following is a proposed process for procuring local experts (LEs) to support BIP updates.

- 1 Roundtable review LE preferred qualifications:** An overview of the LE roles and duties is on the second page of this document and is also in the RFQ template. Prior to posting, the basin roundtables should review the RFQ and Anticipated Scope of Services and edit the designated sections of Anticipated Scope of Services to ensure that skills unique to the roundtable are captured. This should consider roundtable support needs from both the GC and LE.
- 2 Form a LE procurement subcommittee:** Basin roundtables should identify a subcommittee who can directly participate with GC in the LE procurement process and make decisions regarding ranking and recommendations.
- 3 Review Request for Qualifications (RFQ):** The GC has developed an RFQ template that basin roundtables should review and can customize in the Anticipated Scope of Services. The RFQ will include information such as project background, a description of anticipated Local Expert services, a general timeline of activities, budgetary information, response requirements, selection criteria, and a sample Master Services Agreement.
- 4 Release and advertise the RFQ on or before January 28:** Roundtables should post the RFQ to their basin website and advertise it through outlets typically used in their basin. Potential LEs that have expressed interest in the work can be sent the RFQ directly via email. Basin links and process information will also be posted to CWCB's website.
- 5 Receive Statements of Qualification (SOQs) by February 28:** The RFP will be held open for just over 4 weeks. Once SOQs are received, basin roundtables (or their procurement subcommittee) should review and rank prospective LEs based on their qualifications.
- 6 Interview top LE candidates as needed by March 20:** If needed, and at the roundtable's discretion, interviews with the top LE candidates could be conducted.
- 7 Rank and recommend a LE to the GC by March 27:** Roundtables should provide a ranking of LEs to the GC based on the SOQs and interview.
- 8 GC selection of LE by April 10:** The GC's contract with the CWCB requires that the GC select the LE. The GC will, based on the recommendation of the basin roundtables, conduct a phone interview the top ranked LE to ensure that they are qualified to complete the work and that they can meet contractual obligations. If the top ranked LE satisfies these requirements, the GC will issue a Master Services Agreement to the LE.

General Timeline			
<b>January 2020</b> <ul style="list-style-type: none"><li>Review LE roles and duties</li><li>Form procurement subcommittee</li><li>Release RFQ</li></ul>	<b>February 2020</b> <ul style="list-style-type: none"><li>Receive SOQs</li></ul>	<b>March 2020</b> <ul style="list-style-type: none"><li>Roundtable Interviews (if needed)</li><li>Rank LEs</li></ul>	<b>April 2020</b> <ul style="list-style-type: none"><li>GC selects LE</li></ul>

## Summary of Local Expert Scope of Services

The local expert will serve as the primary liaison among the roundtable, the GC and the CWCB. It is anticipated that the local expert will conduct the following core duties, which may require 90% of their budget:

- Facilitate and provide local leadership for the BIP update
- Create a BIP Update Work Plan that describes processes and analyses for developing the required content for their BIP, desired basin-specific studies, issues identified by the basin roundtables, and specific work activities that the LE and GC will complete.
- Update the BIP and support a shorter BIP strategy summary (Vol.1 of the updated BIP).
- Update the BIP project lists by August 2020 and collaborate with the GC on use of the Costing Tool and the Prioritization Matrix.
- Facilitate roundtable and public review of the draft updated BIP.
- Perform administrative functions for the roundtable related to this effort.
- Identify and integrate goals and findings from relevant state and local planning efforts.
- Participate in four collaboration workshops with other LEs, the GC, and CWCB. Workshops will focus on topics such as educating LEs on the use of Technical Update tools and data sets, sharing information on BIP updates in each basin, and collaborating on cross-basin studies.
- Facilitate basin roundtable discussions on strategies for meeting gaps, gathering input on planning scenarios and ideas for improvement, use of the Flow Tool, evaluating environmental and recreational needs and BIP goals.
- Identify necessary technical and modeling analyses.
- Technical analyses may be conducted depending on budget.

**Critical to this effort is being able to understand, convey and evaluate assumptions in the Analysis and Technical Update to the Colorado Water Plan (Technical Update) as well as the Basin Implementation Plan, including modeling, methodologies and related tools (e.g. Costing Tool; Flow Tool).**

## Characteristics of the Local Expert

It is anticipated that the LE will need to possess a variety of general characteristics and skills to successfully carry out the work. Desired characteristics of the LE are broken into general categories and described below (and will be included in the RFQ). The chart to the right describes approximate time spent in each area.

### Project Management and Technical Skills

- Proficient in reading, interpreting, translating and presenting technical materials.
- Strong writer with proven ability to draft reports.
- Excellent track record for meeting deadlines and successfully completing work tasks.
- Ability to operate under uncertainty and drive timelines.

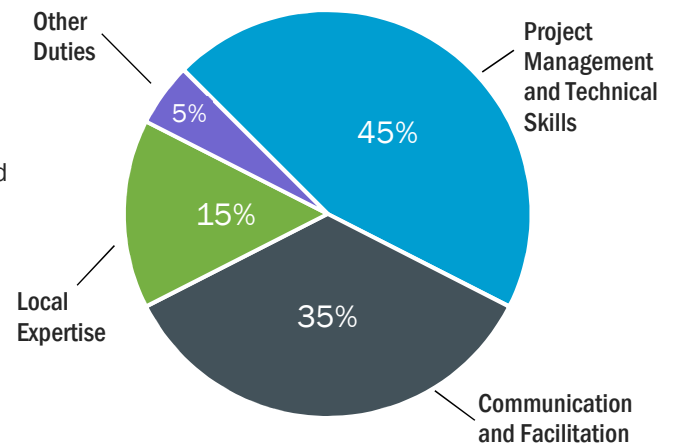
### Communication and Facilitation

- Can easily convey materials and decisions in public presentations.
- Provides solution-oriented collaboration across teams (GC, CWCB and roundtables).
- Facilitates discussions and decision-making in groups who may have diverging views.
- Coordinates conversations between internal and external stakeholders to identify opportunities for improvement and areas where value can be added.
- Tackles areas of potential conflict and finds workable solutions.

### Local Expertise

- Has a specific knowledge of the basin, basin water needs, and the BIP.
- Understands or is able to understand basin and sub-basin issues that need to be represented in the BIP update.
- Understands local needs, priorities, and focus areas for the basin.

**Potential time to be spent in various categories of work**



**Basin roundtables may choose a LE for administrative and data gathering activities and rely on the GC for support of technical analyses. Alternatively, roundtables may hire a LE that offers a more complete set of services. The GC will work with roundtables to identify specific roles and support needs for the LE.**