



Resource Institute
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**REQUEST FOR QUALIFICATIONS (RFQ)
for
RESTORATION DESIGN SERVICES**

Resource Institute works to solve water quality issues caused by the unabated overuse or misuse of our nation's water and watersheds by bringing together a cadre of resource professionals to identify and rectify degraded water quality.

To achieve that mission, Resource Institute seeks qualified engineering firms to provide design services for projects that restore our nation's streams and watersheds.

RFQ Overview

Resource Institute's focus is clearly on restoration efforts that include but are not limited to: Stream Restoration, Heavy Use Area Land Stabilization, Storm Water Management Systems, Reservoir Restoration and Construction, Wetland Restoration, Dam Removal / Dam Repairs, and Resource Implementation of BMP's, Trails, Greenway and Blueway public access projects.

Restoration design services may include, but are not necessarily limited to:

- Watershed or sub-watershed assessments
- Conceptual designs
- Feasibility studies
- Engineering analysis
- Watershed/stream modeling
- Construction design
- Permitting and regulatory development and processing
- Education and community outreach
- Estimating project cost
- Onsite technical assistance
- Bid document and preparation
- Construction oversight
- Pre- and post-project monitoring
- Land Rights acquisition
- Public Hearing Facilitation
- Project Reviews for Public Input
- Onsite Resource Inventories

Resource Institute will enter into a Service Agreement with a selected number of contractors based on individual responses to this RFQ. Service Agreements are generally limited to a term not to exceed five (5) years.

Resource Institute generally seeks to establish Service Agreements with a single contractor or the prime contractor rather than a team of contractors. Therefore, Resource Institute prefers receiving qualification packages that illustrate the capabilities of a *sole contractor*, with the understanding that required services may necessitate the inclusion of sub-contractors by the respondent. The use of subcontractors will always be disclosed in the RFQ response by the potential prime contractor. Resource Institute reserves the right to reject any use of subcontractors disclosed in the RFQ response submitted by a prime contractor. Such reason/s to deny consent are at the sole discretion of Resource Institute but shall not be unreasonably delayed or withheld from the contractor. Failure to disclose the use of subcontractors in the RFQ may result in the termination of a service agreement. Projects will be awarded to selected contractors at Resource Institute's sole discretion relative to location factors, technical abilities, staffing, and quality of prior work with Resource Institute.

Contracts may be awarded based upon a Request for Proposals (RFP) solicited from one or more contractors with Service Agreements established under this RFQ. Resource Institute reserves the right to enter into a Service Agreement by amending/renewing an existing Service Agreement as determined solely by the Resource Institute. Even though some projects lend themselves to the design-build concept, this may or may not be permitted by the funders and partners supporting the project.

Background and Geographic Focus

Resource Institute was organized in 2001 as a 501(c)(3) nonprofit corporation to act as a clearinghouse, planning unit, design implementer, and manager of technical solutions for land management and water resource problems. Resource Institute has established a national reputation for rapid-fire project solutions, establishing funding initiatives, providing professional training conferences, and ensuring project success.

Resource Institute has found that most water quality problems and issues are created by the lack of sound land management practices or where land management practices are outdated or overlooked. Resource Institute has worked to build its expertise in developing and utilizing technologies that repair and restore the quality of both surface water and groundwater caused by land erosion, watershed overuse and misuse, and the leaching of both manmade and natural contaminants into our reservoirs and aquifers.

The severity and frequency of significant storm/flooding events have significantly increased, negatively impacting stream corridors and water resources. These events have the potential to impact project longevity and resiliency. Resource Institute strives to implement projects that incorporate design resiliency components to reduce future site failures requiring additional, repetitive funding to correct.

Over the years, our client groups have included land management agencies with local, state, tribal, and federal government, private land management agencies, local land conservancies, businesses and corporations, land developers, nonprofit organizations, homeowners' associations, and private individuals.

Qualifications

Qualifications should address capabilities for potential services within the Southeast, Southwest, Mid-Atlantic, and the Mid-West Region of the USA.

Resource Institute seeks contractors that have a broad understanding of the principles of stream restoration and watershed mechanics. Qualifications should include documentation identifying the following areas of experience and years of experience in each category. Do not include as qualifications any of the following areas that do not demonstrate more than five (5) years of certifiable experience:

- Rosgen training through Level IV
- Five (5) years of experience in stream and wetland restoration design (excluding work subcontracted to other companies)
- Have designed a minimum of ten (10) related projects in the last five years
- Must hold a current USDA, NRCS certification as a Technical Service Provider (TSP) or demonstrate that such certification will be completed no later than February 1, 2022.
- Individual/s performing the design and giving final approval shall be the individual/s responsible for field oversight and will document multiple onsite visits each week during construction phases.
- Provide a list of the project designers and their qualifications.
- Ability to cash flow projects for three (3) continuous months.
- Licensed to perform Design work in any state(s) where work is being performed.

Qualifications should also include documentation identifying the following areas of experience and years of experience in each category. Do not include as qualifications any of the following areas that do not demonstrate more than five (5) years of certifiable experience:

- Applied Fluvial Geomorphology and Restoration

- Watershed and ecosystem-based wildlife habitat management and restoration for ecosystem-specific species, including but not limited to protected and endangered species.
- Development of conceptual, pre-construction, and as-built designs for restoration projects including but not limited to: Heavy Use Area Land Stabilization, Storm Water Management Systems, Reservoir Restoration and Construction, Wetland Restoration, Dam Removal / Dam Repair, channel design, streambank stabilization, and bioengineering systems.
- Completing feasibility studies for watershed and stream restoration planning and design
- Performing hydraulic and hydrologic analysis and project modeling
- Ability to provide oversight during construction relative to the implementation of plans and design specifications
- Preparing federal, state, and/or local government permit applications and follow through until all permits are approved
- Providing effective community outreach through the presentation of complex and sometimes misconceived information
- Conducting complete sediment management analysis

Anticipated Need for Services

Resource Institute will select the contractor for each project with insight and collaboration from project funders and project partners.

The process for selecting a contractor for a specific project/s will include one or more but is not limited to the following items:

- Project bids regarding total cost.
- Period of performance and terms of performance for completing the project.
- Experience and proximity of the contractor to the job site.
- Contractor's ability to match the needs of each specific project.
- Level of experience and staffing for specified project.
- Prior experience with a contractor submitting a project bid.
- Ability to defer final 25% invoice payment until project completion.

If none of the specific bids received meets with the approval of Resource Institute, Resource Institute reserves the right (with or without conditions) to reject one or all the proposals (bids) and may solicit additional bids or proposals.

Resource Institute shall always retain the right to sole source project contracts. Due to the complex nature of this type of restoration work, Resource Institute cannot always provide an estimate of the amount of work that may be provided to its approved contractors with Service Agreements.

One or more of the funding agencies/agencies may require Resource Institute to publicly bid projects on some projects. In those cases, Resource Institute will include the list of approved contractors with Service Agreements in the bid process who meet the funder's minimum qualifications.

A Service Agreement with a contractor may be terminated at any time if the quality of work becomes unacceptable to Resource Institute. If Resource Institute determines that maintaining a Service Agreement with a contractor is not in the best interest of Resource Institute, client, or sponsor, the Service Agreement may be terminated by Resource Institute. Such a determination will be made on the following basis:

- The quality of the contractor's work relative to the specifications
- General work ethics
- Outputs based on project milestones
- Contractual and Administrative accountability
- Willingness to ensure project integrity on behalf of the Resource Institute
- Ability to maintain adequate capital and maintain adequate qualifying insurance to cover the project during design and oversight, including but not limited to employees, damages, delays by the prime contractor or any approved subcontractor/s.
- Ability to maintain licenses and certifications required to complete the design and the over-sight services necessary to complete the works of improvement.
- Ability to maintain adequate insurance and provide proof of such upon request.

Guidelines for Submitting RFQ's

Respondents must submit proposals in digital format. PDF preferred. **Hard copy submittals will not be accepted.**

Proposals must be submitted to: twinfrey@resourceinstituteinc.org with the Subject Line: "**Design RFQ Proposal**"

Proposals must be received electronically on or before **September 10, 2021, at 4:00 pm ET**. A brief response will be provided for all submissions received successfully.

The proposal package shall include:

Cover Letter (One-page single-spaced with a font size of 12)

- Cover letter with company name and address (letterhead acceptable).

- Include primary contact information for the proposal, including submitting the officer's name, title, address, phone number (plus cell phone), and email address.
- Include the company's service area, where the company is qualified to perform the services required and is willing to provide design services.
- Identify all professional certificates (current) held by the staff providing services such as Rosgen Trained Level IV, Professional Engineer, Certified Soil Scientist, Professional Forester, Professional Hydrologist, etc. **Be sure to highlight or use bold print when listing licenses and certifications.**
- Provide a copy of the balance sheet of the annual financial statement for the last accounting year. The balance sheet shall include a copy of any discrepancies that might have been cited by the certified (licensed) accounting firm included with the accounting statement. **If a certified balance sheet is not provided for the immediate prior year of the signing of a Service Agreement, the Resource Institute reserves the right to deny consideration to awarding a contract with the company submitting an RFQ.**
- List all litigation the company has initiated or been involved in over the past five (5) years and final determinations for each litigation.
- Complete the attached RFQ Questionnaire re: desired geographical areas and types of projects your company will undertake as well as areas/types of projects you do not want to undertake.

General Overview (limited to four pages 8.5 "x 11" typed and single-spaced with a font size of 12)

- A general overview of the company and its specialties relative to Stream Restoration and Watershed Enhancement.
- A summary of directly related work experience (projects) relative to design services identified in the Overview section above.
- How the company meets the qualifications outlined above.

References: Limited to (1) one page 8.5" X11" single-spaced with a font size of 12 (anything exceeding (1) one page will not be considered).

- List of clients (excluding Resource Institute) for whom similar projects have been completed in the last 5 years. Include names, titles, addresses, and phone numbers for the contact person.

Staffing

- A list of staff by position that will have a role in the work outlined and the current billing rate for each position. (One page 8.5" X11" single-spaced with font size of 12)
- Resumes for the top six lead or primary staff positions that will perform work identified in the RFQ. (Limited to one page 8.5" X11" single-spaced with a font size of 12 for each position)

Project Reference Overview

- Provide an overview of the project examples cited in the proposal, the lead staff person, and their role in the project. Limit this to five (5) projects, one page 8.5" X11" single-spaced with a font size of 12 for *each project*. In addition, you may include *only* one (1) photo per project.

RFQ Questions

- Resource Institute will not respond to telephone questions about the RFQ. **Any information obtained by speaking directly with a staff person is not considered an official response for the purposes of this RFQ.**
- Questions concerning this RFQ must be submitted via email to twinfrey@resourceinstituteinc.org.
- Questions must be submitted by **4 pm EST on or before August 23, 2021 and** must have the Subject Line: "**Questions Design RFQ**". No questions relative to this RFQ will be addressed after this date and time.
- Resource Institute will respond to questions by email.

Selection Process

Resource Institute staff, private evaluators, and Board of Directors will evaluate submittals based on but not limited to the following criteria:

- Contents of the proposal
- Overall past project experience and success

- Experience of lead and primary personnel
- Past cooperation with nonprofits, local, state, and federal agencies, and the private sector

Assurance that the company has a commanding understanding of stream restoration, watershed systems, and items listed in RFQ overview (page 1).

- Resource Institute reserves the right to request copies of the company's financial statements for the three years prior to the date of submitting the RFQ.

RFQ Milestones

No later than August 9, 2021: Announce RFQ

August 23, 2021: Deadline for submitting questions on RFQ (4:00 pm ET)

September 10, 2021: Deadline for receipt of proposals to RFQ (4:00 pm ET)

On or before December 1, 2021, Final selection and notification to all competing companies.

Disclaimers

Resource Institute reserves the right to reject any or all proposals for this RFQ. This RFQ does not commit Resource Institute to award a contract or pay any costs incurred during the preparation of the requested proposal.

Attachments:

One page checklist with RFQ requirements

Company Name _____



RFQ Questionnaire

Mandatory: To match RFQ applicants to future Resource Institute projects and geographical areas, complete the following checkbox/fill-in questionnaire and submit as a separate sheet with your application.

1. **What types of projects best fit your licensures, capacity, training, experience, and desires?** (Check all that apply)
Large stream restoration projects (> 2,000 ft) Small to Medium size restoration projects (< 2,000 ft)
EQIP projects Complex projects (utilities, site constraints, water/sewer etc.)
Urban restoration sites Rural restoration sites Greenway/Blueway projects
Trails Parks/park improvements Bridges Dam Removal/Repairs
Debris removal/snag and drag Stormwater Projects Coastal/Flood Resiliency Projects
Other (list) _____
2. **Worksite location preferences?** (Check all the apply)
North Carolina Western NC (west of 1-77) Piedmont NC (I77-I95) Eastern NC (east of I95)
Specific NC Counties only (list): _____
Regional SE states, (list): _____
National states (list): _____
3. **Will you use your primary personnel/crews for all project work?** (This includes surveying, plantings and/or other vegetative measures for erosion control/site stabilization) **Yes** **No**
4. **Will you commit to supervisory personnel (personnel with TSP certification and/or experience listed of this RFQ) providing on-site oversight during construction?** **Yes** **No**
5. **RI project funding sources are typically reimbursed upon completion or in stages, confirm you can cover expenses until RI receives invoice reimbursements (typically < 3 months)?** **Yes** **No**
6. **Will you commit to maintain license and/or other certifications identified in this RFQ for the term outlined (min. of 5 years)?** **Yes** **No**
7. **Estimate earliest date project work could commence**
8. **Do you qualify for minority contract status** **Yes** **No**