William Chapman
Co-Chair
ITRC Board of Advisors
Virginia Department of
Environmental Quality

Rebecca Higgins
Co-Chair
ITRC Board of Advisors
Minnesota Pollution
Control Agency

Patricia C. Reyes
ITRC Director
202-266-4933
preyes@ecos.org

Headquarters:
1250 H Street, NW
Suite 850
Washington, D.C. 20005
P: 202-266-4920
itrc@itrcweb.org

Program of:

ENVIRONMENTAL RESEARCH
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ECOS

Request for Proposals #2022RFP-PM

Project Management, Board of Advisors Strategic Development Support, Training Development, and Meeting Planning

August 5, 2022

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 a 3-year firm fixed price contract for overall project management support to the ITRC Director, ITRC Board of Advisors, and ITRC Teams and their Team Leaders. This RFP includes planning, logistics, coordination, training and team guidance support, implementation and scheduling of team activities, facilitation of meetings, and outreach and communications support for ITRC Teams and Team Leaders. The goal of this support is to assist with cost-effective and efficiently implemented development of ITRC products and training. This support also involves planning 1-2 annual meetings per year with 300-400 attendees, as well as numerous small meeting planning. This contract also involves supporting the ITRC Director with product planning, marketing and product reviews 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 7-10 annual technical teams. ITRC teams are comprised of experts from the environmental sector and range in size from 50-500 members on an average 18–24-month cycle. Each team is provided a Program Advisor 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.

Administrative Information

- This RFP is for a fixed price contract from October 1, 2022 until September 30, 2025.
- There will be no pre-submittal conferences.
- An electronic copy of the proposal must be received by **5:00 PM EST, Friday, August 26, 2022**. **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 of receipt. 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 cell # (703) 362-2038.
- 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 September 15, 2022.
- 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 12**. A response will be provided within three business days of receipt of inquiry and posted promptly 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.

<u>Cover Letter/Key Persons/Proposer Information</u>
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.

<u>Narrative</u>
Proposers shall submit no more than a **three-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.

<u>Resume(s)</u>
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
<u>Price Statement</u>
A 1-page price statement that includes the annual firm fixed price for key personnel and anyone else proposed for the project for each of three years starting October 1, 2022 through September 30, 2025. The base year is from October 1, 2022, to September 30, 2023.

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 <u>not</u> be included in the proposed price:

- ITRC provides website support;
- ITRC provides meeting facilities, and catering as required;
- 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 (approximately 10 days, 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 Organization, 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, facilitation, and communications for ITRC Teams, and overall support to the ITRC Director and Board of Advisors to advise on cost-effective and efficient product development and implementation.

Requirements:

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

Team Project Management Support

- Assist the Board of Advisors Team Leader Liaison coordinate team resources, team leader training sessions and quarterly team conference calls for ITRC Team Leaders and program advisors.

- 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.

- Provide calendar updates of all meetings and milestones.

ITRC Director and Board of Advisors Support

- Participate in weekly strategy sessions with ITRC Director

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

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

- Assist the Board of Advisors Training Liaison coordinate development and implementation of training products and classes.

- Advise the Board of Advisors Team Leader Liaison on the status of team progress and make recommendations for team enhancements.

- Attend ITRC Monthly Board Online and In-person Meetings.

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Training Program Support
- Support the strategic planning, development and delivery of ITRC's training products.
- Update training development and delivery guidance for longer (2-hour IBTs), shorter alternatives, Roundtables, and ways to add interactive opportunities
- Create training (slide) development guidance, examples, learning science research
- Training Project Management - Planning, Scheduling, Coordination and Integration
- Management and development of new online training classes
- Management and development of alternate training options
- Assist teams in determining the best training options for their audience outside of online and in-person training classes. This may include training videos, online panels, podcasts, self-paced courses, or other options.
- Assist with content development, design, exercises/interactivity, and scripting as needed.
- Evaluate and report on training attendance.

Meeting Management
- Help develop the purpose, goals, budget, and theme for annual meetings. Assist with selection of hotel and layout of meeting space requirements.
- 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.
- 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 Director. 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.

General
- Update and 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).
- Be accessible during normal business 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 by a source selection board of ITRC representatives 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 fixed price proposed cost to the organization. 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 lowest 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.

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