

# REQUEST FOR QUALIFICATIONS

for the

## Development of a Climate Action and Adaptation Plan



Montecito Water District

583 San Ysidro Road  
Santa Barbara, CA 93108

September 15, 2023

## **I. STATEMENT OF PURPOSE**

The Montecito Water District (District) is soliciting Statements of Qualifications from qualified consultants to provide professional services to support the development of a Climate Action and Adaptation Plan that covers the infrastructure, operations, and facilities of the District. This Request for Qualifications (RFQ) outlines the expected submittal for all interested parties.

## **II. BACKGROUND**

The District was formed as a County Water District in November 1921 with the purpose of providing potable water to its customers. The District is located on the Central Coast of California, adjacent to the City of Santa Barbara in southern Santa Barbara County. The District encompasses an area of 9,900 acres and serves a population of approximately 11,800 residents. The District's service area currently includes the unincorporated communities of Montecito and Summerland.

The District recognizes the potential impact of climate change to its mission of providing an adequate and reliable supply of high quality water to the residents of Montecito and Summerland at the most reasonable cost. In carrying out this mission, the District places particular emphasis on providing outstanding customer service, conducting its operations in an environmentally sensitive manner, and working cooperatively with other agencies.

At this time, there is still considerable uncertainty about the timing, direction, and magnitude of climate change impacts on various aspects of water resource management. Despite this uncertainty, the District is committed to preparing for future climate change impacts and reducing the District's carbon footprint to assist in reducing long term climate impacts. The District is also committed to using the best available scientific information to inform decision-making now and in the future.

The Climate Action and Adaption Plan (CAAP) should provide a comprehensive assessment of the District's current operations and water supplies, and identify the measures, policies, and projects that have been developed to reduce operational greenhouse gas (GHG) emissions. The development of the CAAP is part of the District's Fiscal Year 2024 budget. The CAAP will support the District's efforts to identify projects to reduce GHG emissions and improve water supply resiliency in the face of climate change, as well as to obtain funding necessary to implement such projects and further support the District's mission.

The CAAP should include a detailed review of District documents such as the 5-Year Strategic Plan, 2020 Urban Water Management Plan, 2021 Water Use Efficiency Plan (Conservation Plan), and 2020 Future Water Demand and Supply Options.

### III. SCOPE OF SERVICES

The Consultant shall develop a detailed project approach that includes a description of all proposed tasks including those suggested herein with any recommended changes or additions. Each task shall include a discussion of the proposed methodology, key personnel involved and approach. The CAAP should account for compliance with Senate Bill 32 and Assembly Bill 1279.

The District's budget for this work is \$100,000 and the proposed project approach should accurately reflect a level of effort commensurate to the budget. Optional tasks are encouraged, if the Consultant believes a task is likely to exceed the budget.

The CAAP scope of work should include, at a minimum, the following tasks:

- **Project Kickoff**
- **Biweekly Coordination Meetings, Agenda and Minutes**
- **Develop Understanding of Current District Operations and Emissions**
- **Develop Inventory, Forecasts and Targets for GHG Emissions**
- **Develop Mitigation and Adaptation Measures**
- **Monitoring and Reporting Plan**
- **CAAP Report**
  - Draft and Final deliverables
  - Presentation at two (2) Board level meetings

### IV. SUBMITTAL REQUIREMENTS

Submittals shall conform to the requirements described herein. Consultants shall submit to District; one (1) electronic PDF copy of the Statement of Qualifications by **12:00 PM on Thursday October 12, 2023**. Statement of Qualifications shall be submitted via email titled **Statement of Qualifications for Development of a Climate Action and Adaptation Plan**.

Statement of Qualifications shall be sent electronically to:

Montecito Water District  
Attn: Adam Kanold, PE  
Engineering Manager  
Montecito Water District  
583 San Ysidro Road  
Santa Barbara, CA 93108-2124  
[akanold@montecitowater.com](mailto:akanold@montecitowater.com)

The minimum information required for inclusion in the submittal is listed below. The Consultant may submit additional information if desired.

1. Cover Letter – providing an overview of how the firm is qualified for the project.



2. Background of Firm
3. Qualifications on similar projects within the last five (5) years as the prime consultant of record, and descriptions of representative projects similar in nature and scope that include owner name and references that can be contacted by the Agency.
4. Subconsultant's (if any) qualifications and experience within the last ten (5) years and descriptions of representative projects similar in nature and scope that include owner name and references that can be contacted by District.
5. Consultant's proposed scope of work and understanding of the project including a detailed description of each proposed task.
6. Resumes for key project team members.

## V. EVALUATION AND SELECTION PROCESS

Consultant submittals will be evaluated as described below. Submittals which do not comply with all submittal requirements as stipulated herein may be considered non-responsive and may not be considered for selection. Submittals deemed responsive will be evaluated based on the following.

1. Qualification of Firm including any Subconsultants
2. Experience of the project team with similar projects
3. Understanding of project goals
4. Quality and completeness of the Statement of Qualifications

The District may elect to conduct interviews with some or all Consultants. The above items will be used in combination with the interview to evaluate and select a qualified firm to complete the project. The District will evaluate the submittals and create a ranking of the consultants. Selection of the consultant who is deemed to be the most qualified among those submitting will be made on the basis of the criteria listed above.

## VI. PROPOSED PROJECT SCHEDULE

RFQ Issued:	September 15, 2023
Statement of Qualifications Due:	12:00pm on October 12, 2023
Scoping and Fee Negotiation	By October 27, 2023
Notice to Proceed	By October 30, 2023
Draft CAAP Report	May 31, 2024
Final CAAP Report	June 30, 2024

## VII. RESERVATION OF RIGHTS

The District reserves the rights to reject any and all Statement of Qualifications. This Request for Qualifications is a solicitation, not an offer to contract. The District reserves the right to issue clarifications and other directives regarding this RFQ, to require further clarification or information with respect to any documents submitted, and to determine the final terms and conditions of any contract. Any and all costs associated with the preparation and response to this RFQ shall be borne solely by the Consultant and at no cost to the District.

## VIII. QUESTIONS

Questions regarding this Request for Qualifications (RFQ) shall be submitted via email to:

Adam Kanold, PE  
Assistant General Manager/Engineering Manager  
Montecito Water District  
583 San Ysidro Road  
Santa Barbara, CA 93108-2124  
[akanold@montecitowater.com](mailto:akanold@montecitowater.com)

Questions submitted after 5:00 PM on October 9, 2023 will not be answered.