

REQUEST FOR PROPOSAL (RFP) for Customer Opinion Survey – 2023

Questions & Answers (as of 1/9/23)

1. **Question:** Can we submit an insurance certificate demonstrating proof of coverage instead of obtaining the signature of our insurance broker on your insurance forms?

Answer: Proof of insurance is not required in the RFP stage. However, if awarded the contract, your insurance broker will be required to complete the Insurance Requirements verification section in the contract.

2. **Question:** Is this the first time EBMUD is doing the survey? If not, who was the incumbent firm who has done the survey for EBMUD most recently? If done prior to 2023, is it possible to be sent a copy of the final report from the survey, as well as the questionnaire?

Answer: This is not the first time EBMUD has done the survey. The last firm to conduct the survey (in 2019) was EMC Research Inc. EBMUD will provide the final report, questionnaire, raw data, and other details from the 2019 survey to the selected bidder as part of the required scope of work in the professional services agreement, not during the RFP stage.

3. **Question:** In the “REQUIRED DOCUMENTATION AND SUBMITTALS” section (beginning page 20), there are several sections that don’t appear to be applicable or might warrant minor adjustments:
 - “Description of the Proposed Equipment/System” section AND “Description of the Proposed Services” section: Our submission is for opinion research services, not a system nor equipment. Our descriptions of our methodological approach will by nature use different terminology and cannot address non-applicable items (such as service-hours required, etc.). I assume we can use our own judgment in how best to approach these sections.
 - “Evidence of Qualification Testing” section: This section is largely non-applicable. Would the District like us to substitute a discussion of Quality Control measures instead or?

Answer: Item 3 (Description of the Proposed System/Equipment), Item 6 (Evidence of Qualification Testing), and other references to equipment testing and maintenance in the Required Documentation and Submittals section do not apply in this Customer Opinion Survey RFP.

Please note the Selection Committee's evaluation criteria, including Methodology, Technical Criteria, and Implementation Plan and Schedule, listed in pages 7-9 of the RFP that should be addressed in the proposal.

4. **Question:** In the "PROPOSAL FORM" section, which details costs, we charge a single, inclusive, not-to-exceed cost for our services. Hourly rates don't really apply as we don't approach projects with an "open-ended" perspective of final costs, nor should any proposer's pricing section do so. With that in mind, how would you like us to approach our pricing proposal? If you like, we can break our costs into key components of the project or?

Answer: Please provide the total not-to-exceed cost for services, including a breakdown of cost by key project components in your proposal. The proposal should address the personnel involved in providing the services and estimated hours scheduled for each person.

5. **Question:** What was the average length of the questionnaire on the last survey? On the last survey, how many total questions were asked? Of the total, how many questions were closed ended and how many open ended?

Answer: The 2019 survey was about 14 pages and had a total of 65 questions. They involved multiple choice, rating, and yes/no type questions, rather than open-ended questions.

6. **Question:** How many total surveys were completed on the last survey? Of the total, how many were completed in English and how many were completed in other languages? Of the total, how many were completed by phone and how many were completed by other methods (e.g. online)?

Answer: A total of 1,205 surveys were completed in the 2019 survey. 1,091 were in English, 57 in Spanish, and 57 in Chinese. 605 were completed by web and 600 by phone.

7. **Question:** Since this is a tracking survey, approximately how many years of data is available for comparison? We are aware the survey was conducted in 2019, but are there other previous years as well?

Answer: Previous year survey data (conducted by telephone only) are available for 2016, 2014, 2010, and 2004-2008. The 2019 survey included a methodology change from phone-only survey to hybrid phone/email.

8. Question: Your answer says we should provide a total not-to-exceed cost for services, including a breakdown of costs for key components, as well as estimated hours for each person. Would you still like us to provide billing rates on the cost proposal form, even if we would not anticipate using those for billing purposes?

Answer: Yes, please include the billing rates for each person.

9. Question: In order to fit additional cost categories on the form, as well as a statement regarding not-to-exceed cost for the work, may we recreate the form following the same format you have used so that additional information can be included?

Answer: Yes.

10. Question: Should the cost information be submitted as a separate file from the rest of our proposal, or can it all be submitted as pdf for the entire proposal package?

Answer: Please include the cost information as part of the package, preferably as one pdf file.

11. Question: Are we permitted to submit someone at East Bay Municipal Utility District as a reference for our work?

Answer: Yes. Please note that reference checks will only be performed on the shortlisted Proposers. The score for reference checks is not included in the preliminary short list score.

12. Question: For the required insurance coverages, you are asking for \$2 million in automobile coverage. We only have \$1 million in auto coverage, would you accept the additional \$1 million needed as covered by our \$5 million umbrella policy? We have no company-owned vehicles, and no personal or leased vehicles would be used in the completion of this work.

Answer: Driving would not be required as part of this work. Excess insurance requirements, such as the \$2M automobile coverage in this case, will be removed and other modifications may be made prior to the signing of the actual agreement. We included standard RFP insurance requirements for now.

13. Question: Are there any required certifications for the equity target categories in terms of minority owned or women owned businesses, or is the requirement met by indicating the majority ownership's gender and ethnicity on the required forms?

Answer: Please note that for this and all RFPs, bidders are required to review the Contract Equity Guidelines available on the District's Contract Equity Program page below and submit Forms P-25 and P-40.

<https://www.ebmud.com/business-center/contract-equity-program>

The District's Contract Equity Office will review the submitted forms as part of the evaluation process and assist our Selection Committee by providing scores for the Contract Equity Program as described in page 9 of the RFP. Bidders are not required to meet any targets.

14. Question: The Contract Equity Program and Equal Employment Opportunity Guidelines say that "the forms can be printed, legibly filled out by hand and submitted to the project manager as part of your bid package. The forms cannot be filled out and sent electronically." How would you like us to handle this in relation to submitting the overall proposal electronically? Can we submit the forms electronically or must we mail it?

Answer: Yes. You can submit the completed Contract Equity forms as part of this bid package, which should be electronically submitted as a PDF. The Contract Equity Program website is being updated to reflect this.

15. Question: Is it okay that I did not include details on small subcontractors and I did not complete Form 46?

Answer: Form 46 is not required for this RFP, as Form 46 is for Construction-related bids. Only Forms P-25 and P-40 are required. A separate Form P-25 would need to be submitted for any known subcontractors doing \$80,000 or more worth of work.

16. Question: I wrote important information in the Letter of Transmittal as a narrative for the overall proposal. In the subsequent sections (4. Description of Proposed Services) I pasted some of the key points, but refer the reviewer back to the Letter of Transmittal to the clearly marked sections for more details in context. Is that going to be a problem? If so, should I paste the full text in twice, or remove it from the Letter completely?

Answer: Please be sure to address the key points and related details under each appropriate section for our consideration and to easily locate the information. The Letter of Transmittal should include a description of the overall approach in providing services to the District as well as highlights of the RFP response and overall benefits to the District.