

REQUEST FOR PROPOSAL  
TO PROVIDE  
WATER UTILITY METER READING  
AND BILL COLLECTION SERVICES  
FOR  
DE ANZA GARDENS DEVELOPMENT



SOLICITATION NUMBER

DA2008-001

DE ANZA HOUSING CORPORATION  
3133 ESTUDILLO STREET  
MARTINEZ, CA 94553

## **I. BACKGROUND**

The DeAnza Housing Corporation is requesting proposals from firms interested in providing water utility meter reading and bill collection services for DeAnza Gardens, a 180 unit tax credit and mixed income housing complex located in Bay Point, California. The type of water meter currently utilized is Master Meter model number N3F-61 FAM SERIES. The program sender is by Star Hexagram, Inc. De Anza Housing Corporation owns all the master meters. This includes the transmitters, repeaters and data collection equipment.

## **II. SCOPE OF SERVICES**

The key elements of the services to be provided include industry best practices related to water utility meter reading services and bill collection services typical of residential tax credit properties for mixed income families. Specific services to be provided are as follows:

- a. Monthly Meter Reading, Billing and Reporting
- b. Read meter on a monthly basis, invoice and collect remittances
  - Pre-bill report of individual unit water consumption and a breakdown of the corresponding amounts to be billed on individual unit invoices
  - End of Month Report and Funds Collected as well as collection of all funds

## **COST OF SERVICES**

All Offerors must submit their fee proposal for required services necessary to provide De Anza Housing Corporation with the required deliverables in the format prescribed and marked as "Cost Proposal." Each Proposal must include:

- c. A fee proposal and detailed explanation for supplemental work that may be performed.. The proposal must clearly identify what types of services will be separately billed to De Anza Housing Corporation

## **III. CERTIFICATIONS**

Respondent warrants and certifies that Respondent and any other person designated to provide services hereunder has the requisite training, license and/or certification to provide said services, and meets all competence standards promulgated by all other authoritative bodies, as applicable to the services provided herein.

## **IV. TERM OF CONTRACT**

A contract for water utility meter reading and bill collection services for the housing complex awarded in response to this RFP will be for a one year period with a two (2) year option period of one year each. The De Anza Housing Corporation shall have the option of renewing their respective agreements with the successful contractor upon board approval.

## **V. PRE-PROPOSAL CONFERENCE**

**A Pre-Proposal Conference will be held at DeAnza Gardens 205 Pueblo Ave Baypoint, CA 94565 at 10:00 a.m. (PST) on November 19, 2008.** A tour of the housing complex will be conducted during the Pre-proposal Conference.

## **VI. PROPOSAL REQUIREMENTS**

Respondent's Proposal shall include the following items in the following sequence:

A. **EXECUTIVE SUMMARY**: Summary of the Respondents proposal; brief description of the contractor's mission, experience overall and in the County of Contra Costa or other counties, and proposed program. Limit summary to one page. Summary shall include the name of the applicant contractor, and name of the program as title.

B. **NARRATIVE**: Detailed statement of the work to be accomplished, how Respondent proposes to accomplish and perform each specific service, planned and unique problems perceived by Respondent and their solutions. Please provide a clear and concise description of the program using the format below. **The narrative portion of the application is limited to nine double spaced pages (minimum 12-point font). Each component should follow the specified page limit.**

### ***History, Experience, Past Performance (2 pages)***

In rating the application, the De Anza Housing Corporation will consider the extent to which the organization has the resources and experience necessary to implement the proposed activities in a timely manner as demonstrated by past performance.

1. Summarize the history and purpose of the contractor's presence in the county identified, to include the total number of years and with service contracts with any State, County, Federal or private institutions.
2. Spotlight past experience and performance on projects similar to the proposed project undertaken by the contractor.
3. Provide resumes for key staff involved in this project. This should include, at a minimum, the organizations, Chief Executive Officer, Chief Financial Officer, and/or Program Manager, as applicable. These are attachments and do not count as part of the page limit.

B. RESPONDENT QUALIFICATION GENERAL QUESTIONNAIRE: Completed Respondent Qualification General Questionnaire.

C. LITIGATION DISCLOSURE: Completed Litigation Disclosure. Statements of any existing, pending criminal or civil litigation.

D. REFERENCES AND QUALIFICATIONS

1. Background of Respondent and support personnel, including professional qualifications and length of time working in Respondent's capacity. Include résumés of key personnel for services that Respondent proposes to perform.
2. Relevant experience of Respondent as it relates to the scope of services contemplated by the RFP.
3. Specific experience with public entity clients, especially large municipalities or other governmental agencies or related private companies.
4. Other resources, including total number of employees, number and location of offices, number and types of equipment available to support this project.
5. Respondent shall provide three (3) references for whom Respondent has provided services. Please include contact names, job title and current phone number for each reference.

E. SIGNATURE PAGE: Respondent must complete and include Signature Page with proposal. The Signature Page must be signed by a person, or persons, authorized to bind the entity, or entities, submitting the proposal. Proposals signed by a person other than an officer of the company or partner of the firm shall be accompanied by evidence of authority.

F. Start-Up Plan: Respondent shall provide a completed plan to begin operations upon signed contract

**VII. AMENDMENTS TO RFP**

Changes or amendments to this RFP may be posted on the DeAnza Housing Corporation's website at <http://www.deanzahousing.org/>. It is Respondent's responsibility to review this site and ascertain whether any amendments have been made prior to submission of a proposal.

**VIII. SUBMISSION OF PROPOSALS**

- A. Respondent shall submit four (4) copies of the Proposal, the original signed in ink, in a sealed package, clearly marked on the front of the package **DeAnza Housing**

**Corporation Water Utility Meter Reading Services & Bill Collection Services Proposal. All Proposals must be received no later than 4:30 p.m. (PST) December 1, 2008 at the address below.** Any Proposal received after this time shall not be considered. Mail all proposals to DeAnza Housing Corporation, Attn: Cynthia E. Simpson (DA2008-001) P.O. Box 2759, 3133 Estudillo Street, Martinez, CA 94553. Reference: DA2008-001 on your proposal. Proposals sent by facsimile or email will not be accepted.

Contact the Purchasing Department at (925) 957-8043 to request a copy of the RFP or you may download the RFP by logging onto our website at <http://www.deanzahousing.org/>

- B. Proposal Format: Each proposal shall be typewritten and submitted on 8 ½" x 11" white paper inside a three ring binder. Font size shall be no less than 12 point type. All pages shall be double spaced and printed on one side only. Margins shall be no less than ¾" around the perimeter of each page. Maximum number pages allowed shall be 75, including required attachments. Each page shall be numbered. Electronic files shall not be included as part of the proposal; compact disks and/or computer disks submitted as part of the proposal shall not be considered. Each proposal must include the sections and attachments in the sequence listed in the Proposal Requirements Section, and each section and attachment must be indexed and divided by tabs and indexed in a Table of Contents page. Failure to meet the above conditions may result in disqualification of the proposal.
- C. Respondents who submit responses to this RFP shall correctly reveal, disclose, and state the true and correct name of the individual, proprietorship, corporation, and /or partnership (clearly identifying the responsible general partner and all other partners who would be associated with the contract, if any). No nick-names, abbreviations (unless part of the legal title), shortened or short-hand, or local "handles" will be accepted in lieu of the full, true and correct legal name of the entity. These names shall comport exactly with the corporate and franchise records of the California Secretary of State. Individuals and proprietorships, if operating under other than an individual name, shall match with exact Assumed Name filings. Corporate Respondents and limited liability company Respondents shall include the 11-digit Comptroller's Taxpayer Number on the signature page of the Proposal.
- If an entity is found to have incorrectly or incompletely stated its name or failed to fully reveal its identity on the signature page of its proposal, DeAnza Housing Corporation shall have the discretion, at any point in the contracting process, to suspend consideration of the proposal.
- D. All provisions in Respondent's proposal, including any estimated or projected costs, shall remain valid for ninety (90) days following the deadline date for submissions or, if a proposal is accepted, throughout the entire term of the contract.
- E. All proposals become the property of the DeAnza Housing Corporation upon receipt

and will not be returned. Any information deemed to be confidential by Respondent should be clearly noted on the page(s) where confidential information is contained; however, DeAnza Housing Corporation cannot guarantee that it will not be compelled to disclose all or part of any public record under the California Public Records Act, since information deemed to be confidential by Respondent may not be considered confidential under California law, or pursuant to a Court order.

- E. Any cost or expense incurred by the Respondent that is associated with the preparation of the Proposal, the Pre-Proposal conference, if any, or during any phase of the selection process, shall be borne solely by Respondent.

## **IX. RESTRICTIONS ON COMMUNICATION**

Once the RFP has been released, Respondents are prohibited from communicating with the DeAnza Housing Corporation staff regarding the RFP or Proposals, with the following exceptions:

- A. Questions concerning this RFP shall be answered during the pre-solicitation meeting.
- B. Respondent shall not contact DeAnza Housing Corporation employees before an award has been made, except as set out herein. Violation of this provision by Respondent or his agent may lead to disqualification of his proposal from consideration.
- C. The DeAnza Housing Corporation reserve the right to contact any Respondent for clarification after responses are opened and/or to further negotiate with any Respondent if such is deemed desirable by the DeAnza Housing Corporation.

## **X. EVALUATION CRITERIA**

The DeAnza Housing Corporation will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. The DeAnza Housing Corporation will appoint a selection committee to perform the evaluation. Each Proposal will be analyzed to determine overall responsiveness and qualifications under the RFP. Criteria to be evaluated may include the items listed below. The selection committee may select all, some or none of the Respondents for interviews. If the DeAnza Housing Corporation elects to conduct interviews, Respondents may be interviewed and re-scored based upon this same criteria, or other criteria to be determined by the selection committee. The DeAnza Housing Corporation may also request additional information from Respondents at any time prior to final approval of a selected Respondent. The DeAnza Housing Corporation reserves the right to select one, or more, or none of the Respondents to provide services. Final approval of a selected Respondent is subject to the action of the DeAnza Housing Corporation Board of Directors.

Evaluation criteria:

- A. Responsiveness to the Request for Proposal (30%)
  - 1. Requested information included and thoroughness of response.
  - 2. Understanding and acceptance of the scope of services.
  - 3. Acceptance of the RFP and Contract terms.
  - 4. Clarity and conciseness of the response.
- B. Evaluation of the Proposed Pricing Schedule (20%)
- C. Respondent's background and capability to provide the services requested (30%).
  - 1. Background of Respondent.
  - 2. Respondent's support personnel, including professional qualifications and length of time working in Respondent's capacity.
- D. Relevant experience of Respondent. (20%)
  - 1. Specific experience with public entity clients, especially large municipalities or private companies.
  - 2. Resources available to support this project, including total number of employees, number and location of offices, number and types of equipment available.
  - 3. References.

## **XI. AWARD OF CONTRACT AND RESERVATION OF RIGHTS**

- A. DeAnza Housing Corporation reserves the right to award one, more than one, or no contract(s) in response to this RFP.
- B. The Contract, if awarded, will be awarded to the Respondent(s) whose Proposal(s) is deemed most advantageous to the DeAnza Housing Corporation, as determined by the selection committee, upon approval of the Board of Directors.
- C. DeAnza Housing Corporation may accept any Proposal in whole or in part. If subsequent negotiations are conducted, they shall not constitute a rejection or alternate RFP on the part of DeAnza Housing Corporation.. However, final selection of a Respondent is subject to DeAnza Housing Corporation Board of Directors' approval.
- D. DeAnza Housing Corporation reserve the right to accept one or more proposals or reject any or all proposals received in response to this RFP, and to waive informalities and irregularities in the proposals received. DeAnza Housing Corporation also reserves the right to terminate this RFP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFP process.
- E. DeAnza Housing Corporation will require the selected Respondent(s) to execute the contract in substantially the form as attached, prior to award. No work shall commence until DeAnza Housing Corporation sign the contract document(s)

## **XII. OTHER PROVISIONS**

A. Respondent(s) shall provide the necessary evidence of insurance as required in this RFP and the Contract. Contract documents are not binding on DeAnza Housing Corporation until approved by the DeAnza Housing Corporation's Board of Directors. In the event the parties cannot negotiate and execute a contract within the time specified, DeAnza Housing Corporation reserves the right to terminate negotiations with the selected Respondent and commence negotiations with another Respondent.

B. This RFP does not commit DeAnza Housing Corporation to enter into a Contract, award any services related to this RFP, nor does it obligate DeAnza Housing Corporation to pay any costs incurred in preparation or submission of a proposal or in anticipation of a contract.

C. If selected, Respondent will be required to comply with the Insurance and Indemnity Requirements to be established

D. Conflicts of Interest. Respondent acknowledges that it is informed that the Charter of the DeAnza Housing Corporation and its Ethics Code prohibit a DeAnza Housing Corporation officer or employee, as those terms are defined in the Ethics Code, from having a financial interest in any contract with the DeAnza Housing Corporation. An officer or employee has a "prohibited financial interest" in a contract with the DeAnza Housing Corporation or in the sale to the DeAnza Housing Corporation of land materials, supplies or service, if any of the following individual(s) or entities is a party to the contract or sale: the DeAnza Housing Corporation officer or employee; his parent; child or spouse; a business entity in which he or his parent, child or spouse owns ten (10) percent or more of the voting stock or shares of the business entity, or ten (10) percent or more of the fair market value of the business entity; or a business entity in which any individual or entity above listed is a subcontractor on a DeAnza Housing Corporation contract, a partner or a parent or subsidiary business entity. Respondent is required to warrant and certify that it, its officers, employees and agents are neither officials nor employees of the DeAnza Housing Corporation

E. Independent Contractor. Respondent agrees and understands that, if selected, it and all persons designated by it to provide services in connection with a contract, is (are) and shall be deemed to be an independent contractor(s), responsible for its (their) respective acts or omissions, and that DeAnza Housing Corporation shall in no way be responsible for Respondent's actions, and that none of the parties hereto will have authority to bind the others or to hold out to third parties, that it has such authority.

### **XIII. PROPOSAL DEADLINE**

**Deadline for acceptance is on December 1, 2008, no later than 4:30p.m. (PST).  
Late submissions will not be considered.**



#### **XIV. CONTACT POINT FOR PROPOSAL**

Cynthia E. Simpson  
Director of Facilities Management  
The Housing Authority of the County of Contra Costa  
3133 Estudillo St  
P.O. Box 2759  
Martinez, CA 94553  
Phone: 925-957-8040  
Email: [csimpson@contracostahousing.org](mailto:csimpson@contracostahousing.org)

## RESPONDENT QUALIFICATION GENERAL QUESTIONNAIRE

1. Name/Name of Agency/Company:
2. Address:
3. Telephone/FAX:
4. Does your Company anticipate any mergers, transfer of organization ownership, management reorganization, or departure of key personnel within the next twelve (12) months that may affect the organization's ability to carry out its proposal?  
Yes\_\_\_ No\_\_\_
5. Is your Company authorized and/or licensed to do business in California?  
Yes\_\_\_ No\_\_\_
6. Where is the Company's corporate headquarters located?
7. a. Does the Company have an office located in California?  
Yes\_\_\_ No\_\_\_
  - b. If the answer to the previous question is "yes", how long has the Company conducted business from its California office?  
\_\_\_\_\_(years) \_\_\_\_\_(months)
  - c. State the number of full-time employees at the California office.
8. a. If the Company does not have a California office, does the Company have an office located in another State?  
Yes\_\_\_ No\_\_\_
  - b. If the answer to the previous question is yes, how long has the Company conducted business from its other State office?  
\_\_\_\_\_(years) \_\_\_\_\_(months)
  - c. State the number of full-time employees:
9. Has the Company or any of its principals been debarred or suspended from contracting with any public entity? Yes\_\_\_ No\_\_\_

If yes, identify the public entity and the name and current phone number of a representative of the public entity familiar with the debarment or suspension, and state the reason for or circumstances surrounding the debarment or suspension, including but not limited to the period of time for such debarment or suspension.

10. Indicate person whom the DeAnza Corporation may contact concerning your proposal or setting dates for meetings.  
Name:  
Address:  
Telephone:  
FAX:  
Email:
11. Surety Information  
Have you or the Company ever had a bond or surety canceled or forfeited? Yes ( ) No ( ).  
If yes, state the name of the bonding company, date, amount of bond and reason for such cancellation or forfeiture.

12. Bankruptcy Information

Have you or the Company ever been declared bankrupt or filed for protection from creditors under state or federal proceedings? Yes ( ) No ( )

If yes, state the date, court, jurisdiction, cause number, amount of liabilities and amount of assets.

13. Provide any other names under which your business has operated within the last 10 years.