



Request for Proposals Update NASTT's Laterals Good Practices Guidelines and Training Course Materials

The North American Society for Trenchless Technology (NASTT) is requesting proposals from qualified firms to update its Laterals Good Practices Guidelines Publication and Course Training Materials (Project).

Proposers shall notify NASTT's Executive Director, Matthew Izzard, if they intend to submit a proposal so they can be added to the list to receive addenda and responses to questions raised during the proposal phase. If a Proposer does not inform the Executive Director, NASTT is not responsible for providing any follow-up materials to the Proposer.

Background

NASTT is an engineering society of individuals, public organizations, and private companies with strong beliefs in the practical, social, and environmental benefits of trenchless technology. With over 2,000 members, NASTT is the largest trenchless technology society in North America.

NASTT offers multiple in-depth, high-quality training courses each year in cities throughout North America covering targeted trenchless topics, such as CIPP, HDD, pipe bursting, laterals, and new installation methods. We strive to produce high quality course content that is peer reviewed for non-commercialized, consensus-based information.

Our mission is to be the premier resource for knowledge and education in trenchless technology. As such, NASTT has organized a Training and Publication Committee (Committee) with the mission "to promote education on current, up to date trenchless methods both virtually and in-person." Funds raised through these courses provide the financial resources to further develop and update the training courses NASTT provides.

The Laterals Good Practices Guidelines Publication (Publication) and Course Training Materials (Course) were developed and first published in 2015. Technologies have advanced over the past several years, and significant updates need to be made so that Publication and Course materials are current and relevant. Therefore, this Request for Proposal (RFP) is being issued by the Committee to update both the Publication and Course. The NASTT Board of Directors approved the 2022 budget with the intent to fund the work associated with this RFP in 2022/2023.

The Course will be taught by NASTT instructors and will complement the Publication. The Publication is provided as part of the Course training materials and is sold separately via the NASTT bookstore to individuals seeking knowledge regarding Lateral rehabilitation.

Project Description

In 2015 NASTT published the first edition of the Publication to provide a relatively concise document that identified the principal issues surrounding the evaluation, creation, and execution of a successful sewer lateral rehabilitation program. The intent was to provide a reference document for consideration of when and where a lateral program would be beneficial, how to structure such a program, and to introduce

rehabilitation technologies that were currently in use. The Publication highlighted the many challenges with sewer laterals from a sewer system management perspective, the impact and extent of the problem, and technologies and methods for condition assessment and rehabilitation. While complex issues associated with lateral program management continue to exist today, the updated Publication and Course will instead focus on the technology used to assess and rehabilitate sewer laterals.

The goal is to provide an overview of inspection, condition assessment, and rehabilitation methods used across the NASTT membership (United States, Canada and Mexico), discuss the commonality and differences between technologies, and provide information on emerging technologies. NASTT recognizes the need to update the existing Program Management sections, such as financing lateral programs, ownership, and legal and liability; however, at this time these concepts should only be mentioned but should not be the focus of the updated Publication and Course.

Proposers should consider the following outline as a starting point to develop content for the updated Publication and Course materials. Information provided for each section is intended to help Proposers understand the vision and expected key components for the updated Publication and Course.

Appendix A is a list of interested parties that the selected Firm shall interview as part of the update process. The selected Firm shall also perform additional outreach to manufacturers and contractors not on this list to ensure a complete list of technologies and methods are included in the updated Publication and Course. It is also important to ensure that technologies and methods discussed in the Publication and Course are widely accessible to NASTT membership, except for emerging technologies.

- 1) Forward Section shall be included.
- 2) Introduction. This is intended to be a “big-picture” discussion of sewer laterals and their challenges from a larger sanitary sewer system perspective. The 2006 Water Environment Research Foundation (WERF) study provided much of the background information used in the first Publication. This information should be updated with new data from WERF or the EPA, if it exists, or should be used as a reference if updated studies are not available. Firms shall introduce the topics covered in the book, including the lifecycle of a sewer lateral and a flow chart to illustrate the various life cycle stages, and a brief introduction to potential technologies or methods used for rehabilitation. The introduction shall also provide a clear explanation of the Publication’s purpose and learning objectives.
- 3) Locating, inspecting and Condition Assessment. This section shall include updated methods for locating, inspecting and condition assessment of sewer laterals. A discussion regarding the various materials, diameters, layouts, and configurations should be addressed in this section if it is not covered in the introduction. This section should also discuss the advantages and limitations of each of the technologies discussed.
- 4) Failure Modes and Renewal Planning. This section shall include the various types of failure modes of sewer laterals, a brief discussion about inflow and infiltration, and key issues for rehabilitation/repair decision making. A brief introduction to program management issues, such as financing, ownership, access, legal and liability should be included. The intent is to make the reader aware of these elements which are connected to the application of technologies and should be further considered by the reader.
- 5) Full-Length Rehabilitation Technologies. This section shall include a discussion on a wide array of rehabilitation technologies used for sewer laterals. It is anticipated that the selected firm will include at a minimum: CIPP, pipe bursting, grouting, and various coatings. The selected firm shall

organize this section in a logical manner so that it is easily understood and include at a minimum: method description, materials and equipment, installation procedures, curing methods, advantages and limitations, and productivity. Case studies shall be included, at least one per method.

- 6) Point Repair Technologies. This section shall include CIPP spot liners and the various curing methods, grouting, and connection rehabilitation. The selected firm shall organize this section in a logical manner so that it is easily understood and include at a minimum: method description, materials and equipment, installation procedures, curing methods, and advantages and limitations.
- 7) Emerging Technologies. Technologies that are used in other countries but not yet widely available in North America shall be described in this section.
- 8) References and Resources. The selected firm shall include the appropriate references and resources in this section. This may include items such as acronyms and abbreviations, glossary of terms, equipment manufacturers, etc.

Description of Required Services

The services to be provided shall include, but not limited to those listed below. The services include specific tasks as well as goals that the successful firm is expected to strive to reach:

1) Project Management

- a) Prepare budgets for each task and milestone for the Project.
- b) Provide monthly progress and expenditure reports to accompany each invoice.
- c) Provide a detailed Project schedule, including milestones, major activities, and deliverables for the Project. The schedule should be updated on a quarterly basis.
- d) Provide internal quality control on all work products submitted to NASTT.
- e) Prepare agendas, lead Project meetings, and provide meeting minutes.

2) Publication

- a) The Publication should be written to reflect current technologies used to inspect and rehabilitate sewer laterals as discussed in the Project Description. A wide variety of manufacturers' equipment, materials and methods shall be incorporated to provide readers with the diverse means and methods currently used in the North American markets (Canada, United States and Mexico). The outline provided in the Project Description is a starting point and should be modified as necessary to accomplish the goals and requirements within this RFP.
- b) The Publication deliverable will be in Word format. NASTT will produce the Publication for use and/or sale in electronic format. NASTT reserves the right to update and/or modify the Publication as it sees fit. NASTT anticipates the Publication will be reviewed with minor edits made by the Laterals Committee on an annual basis.

3) Training Course Materials

- a) Provide Training Course materials to match the Publication content and outline. The length and scope of the Course will be determined by the content of the Publication and Course outline but shall be no less than 60 slides. Slide decks shall be provided in sections consistent

with the Publication and Course outline. Slide decks should contain photos and other graphics wherever possible. Slides shall not be overly crowded with words.

- b) Course deliverables include the slide deck in PowerPoint format and a Course Agenda in Word format. NASTT reserves the right to update and/or modify the Course materials as it sees fit. NASTT anticipates the Course materials will be reviewed with minor edits made by the Laterals Committee on an annual basis. The course length is intended to be 4 hours.

4) Other Requirements

a) Graphics.

- i) All photographs, figures, graphs, etc. must have sources cited and authority granted for use in both the Publication and Course materials. NASTT may assist the Proposer in obtaining necessary copyright authority but should not be considered the lead in this effort. Written copyright authority for each "graphic" shall be provided to NASTT as part of the final deliverable.
- ii) An initial source of photographs, figures, graphs, etc. are those used in the current Publication and Course materials. The successful Firm shall provide updated materials and graphics and make every effort to ensure this material comes from diverse sources, not favoring any one supplier/manufacturer over another. Material should not have company logos, names, and other identifying attributes prominently displayed.

b) Copyright.

- i) Copyright assignment for the Publication and Course shall be assigned to NASTT. It will be stated in the preface of the training course and the successful Firm shall sign an "assignment" release. Release forms shall be provided by NASTT and each contributing member of the successful Firm's team shall execute the release form and submit as part of the final deliverables.
- ii) Individuals who prepare Publication and Course materials shall be recognized in the preface of the Publication and Course materials. Wording shall be approved by NASTT.

c) Timeline and Deliverables.

- i) The successful Firm will be given 12 months to complete this work. Proposers shall provide a schedule as part of their proposal. The schedule shall outline at a minimum the following key milestones:
 - o Kick-off Meeting. It is anticipated that this meeting will be used to convey NASTT's vision and to ensure consensus on the scope.
 - o 30% Review Meeting and deliverable. It is expected that this meeting will take place early on in the process to review the concepts and ensure consensus between NASTT and the selected firm. At a minimum the proponent shall have a draft table of contents, draft introduction section, draft learning objectives for each chapter and a list of all industry companies who they have received content from.
 - o 60% Review Meeting and deliverable. This shall include at a minimum draft language for each chapter and a complete list of industry companies who

they have received content from. This shall also include a draft power point presentation.

- 90% Review Meeting and deliverable. This shall include a revised draft of all chapters, incorporating all comments provided by the review committee. This shall also include a final draft of the Power Point presentation incorporating all comments from the review committee. The successful firm shall walk through the Power Point presentation as part of the 90% review meeting.
- Delivery of Final Publication and Course

Proposers shall allow 3 weeks per review by NASTT in the schedule. Comments and responses shall be documented via a comment log in excel format and provided to the Publications Committee with submittal of each subsequent work product.

d) Quality Assurance.

- i) Proposers shall include a statement regarding their Quality Assurance plan.

e) Train the Trainers.

- i) Proposers shall include a 4-hour review session with members of the Laterals Committee and NASTT Laterals trainers to review the Publication and Course materials after final delivery.

Services to be Provided by NASTT

The services to be provided by NASTT shall include, not necessarily be limited to, the following:

- 1) Provide a single point of contact for Project Management and communication.
- 2) Provide a team of industry professionals to participate at key meetings and provide a vision for the Project.
- 3) Provide successful firm access to the electronic format (PDF) of the current Publication and any supporting instructors' notes; however, the successful Firm may not copy, reproduce, or otherwise use this material for personnel or any other use.
- 4) Provide NASTT's updated slide deck template for use to produce the Course slide deck using that template. The successful Firm will also be provided the most recent Course slide deck and supporting instructors' notes; however, they may not copy, reproduce, or otherwise use this material for personnel or any other use.

Proposal Requirements

Firms responding shall submit an electronic copy of the proposal which shall include the items listed below. Note that clear, organized, and concise proposals prepared by the Project Manager are highly desirable.

Proposals shall not exceed 15 single-sided, 8.5" x 11" pages (excluding resumes). One 11" x 17" page may be used for the project schedule. Font shall be not less than 11 point and shall be Arial, Times New Roman, or Calibri.

- 1) Cover letter
- 2) Description of Team, including names, classifications, and qualifications of key personnel and sub-consultants, and an organizational chart showing how the team will work together.
 - a. Identify the key contact individual who will be responsible for all material.

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- b. Identify which members are responsible for development of the major portions of the Publication and Course materials, and a summary of their experience as it relates to the sections they will work on
- 3) Identification of sub-consultants and their scope of services.
- 4) The proposed approach to the project scope of work, broken down by tasks, subtasks, and deliverables. The approach should also include discussion on how the team intends to conduct outreach for publication/course content as well as how the team intends to collaborate with NASTT.
- 5) A table showing the estimated hours for all consultants assigned per task based on the firm's understanding of the Project scope of work.
- 6) A schedule per item 4c in the scope of work.
- 7) Resumes for each proposed team member. Resumes are limited to a two-page maximum.
- 8) Fee Proposal. The fee should be a lump sum amount with percentages associated for each major milestone. Payments will be made in increments based on completion of each milestone.

Any information provided to NASTT pursuant to this RFP is considered property of NASTT. Proposals received are not considered confidential in any way. All material produced under this RFP and contracted work is the property of NASTT. Products in whole or in part may not be used by the selected Firm or anyone else without the expressed written permission of NASTT.

RFP Schedule (Tentative)

The following is the current schedule for the selection process:

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| 1) Issue Request for Proposals | August 15, 2022 |
| 2) Proposals Due | September 30, 2022 |
| 3) Interviews (if needed) | October 7, 2022 |
| 4) Notification of Results | October 18, 2022 |
| 5) Initiate Negotiations with Highest Ranked Team | October 24, 2022 |
| 6) Contract Award | November 1, 2022 |

Selection Process and Criteria

The Committee reserves the right to waive formalities or to reject any and all proposals. The Committee will evaluate information provided in the written proposals and interviews (if held) to rank the Proposers using the following evaluation criteria:

- 1) Project Manager's qualifications and ability to perform the work as outlined above.
- 2) Proposer's key staff and sub-consultant qualifications, knowledge, and ability to perform the work as outlined in the RFP.
- 3) Proposer's understanding of the Project as demonstrated by their project approach and responsiveness to the RFP.
- 4) Demonstrated ability to meet NASTT's desired timeframe.

<u>Evaluation Criteria</u>	<u>Points</u>
Project Manager's Qualifications	10
Team Qualifications	40

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Approach to the Work	40
Schedule	10

After evaluation by the Committee, the top-ranked candidate will be invited to work with NASTT to develop a Services Agreement (SA). If NASTT is unable to successfully negotiate with the top-ranked candidate, NASTT reserves the right to terminate negotiations and begin new negotiations with the next highest-ranked candidate.

It is the sole responsibility of the Proposer to meet the requirements of this RFP. Failure to meet the stated requirements may result in the elimination of the Proposer from consideration. Proposers may provide written questions to NASTT's Executive Director at any time up to 10 days before due date for submission of the proposal. No further questions will be entertained after that date. Written questions should be e-mailed to Matthew Izzard at mizzard@nastt.org. Responses will be made by e-mail to the Proposers on the list of interested Firms. Each Proposer should designate a lead contact person and name the responsible person for compliance with all provisions of this agreement.

Please submit a PDF electronic copy of your response to this RFP by 2:00 p.m. EST on Friday, September 30, 2022 via the Submission form accompanying this document on NASTT's website.

<https://app.smartsheet.com/b/form/21563f733ea24841ae6df1e367e81c9a>

Proposals received after the specified time will be considered late and will be rejected. Phone interviews will not be conducted for Candidates with rejected Proposals.