



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

The North American Society for Trenchless Technology (NASTT) is requesting proposals from qualified firms to update its HDD 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 provides the financial resources to further develop and update training courses NASTT provides.

The HDD Good Practices Guidelines Publication (Publication) and Course Training Materials (Course) were developed and first published in 2001, with updated editions in 2004, 2008, and 2017. 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 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 HDD knowledge.

Project Description

In 2001 NASTT published the first edition of the Publication to provide a relatively concise document that identified the principal issues surrounding the evaluation, planning, and execution of successful HDD installations. The intent was to provide a reference document for consideration of when and where a HDD installation would be beneficial, how to plan the project, and to introduce technologies that were

currently in use. The Publication highlighted the many aspects of this construction method, including equipment, materials, tooling and other technologies. While these complex issues continue to exist today, the updated Publication and Course will focus on the technology used to successfully install pipe and conduit by HDD methods.

The goal is to provide an overview of methods used across the NASTT membership (United States, Canada and Mexico), the commonality and differences between technologies, and emerging technologies.

The 5th Edition of the HDD Good Practices Guidelines is an update of the current version. NASTT's HDD Publication Committee has compiled an extensive list of suggested updates from the HDD industry, representing contractors, engineers, and manufacturers. This list will be provided to the selected firm as a basis for the suggested updates.

Proposers should consider the 4th edition of the publication as a starting point to develop updated content for the 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 outreach 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 in the Publication and Course are widely accessible to NASTT membership, except for emerging technologies.

Description of Required Services

The services to be provided shall include, but not be 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 monthly basis.
- d) Provide internal quality control on all work products submitted to NASTT.
- e) Prepare agendas, lead Project meetings, and provide meeting minutes.

2) Update Publication

- a) Update the Publication to reflect current technologies used to plan, design and construct HDD installations 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 updated on an annual basis by the Laterals Committee.

3) Update Training Course Materials

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- a) Update the Training Course materials to match the updated Publication content and outline. The length and scope of the Course will be determined by the content of the updated 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.
 - 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 updated on an annual basis by the HDD Committee.
- 4) Other Requirements
- a) Graphics.
 - i) All photographs, figures, graphs, etc. must have sources cited and the authority granted for use in both the Publication and Course materials. NASTT may assist the Proposer in obtaining necessary copyright authority but should 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 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.
 - i) The successful Firm will be given 6 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:
 - Kick-off Meeting. It is anticipated that this meeting will be used to convey NASTT’s vision and to ensure consensus on the scope.
 - 30% Review Meeting. 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.
 - 60% Review Meeting
 - 90% Review Meeting
 - Delivery of Final Publication and Course

Proposers shall allow 3 (three) 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 the final 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 (four) hour review session with members of the HDD Committee and NASTT HDD 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 the 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 8 (eight) 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.
 - 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. A team representing planning, engineering, design, manufacturers and construction is desired.
- 4) The proposed approach to the project scope of work, broken down by tasks, subtasks, and deliverables.
- 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.

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- 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 | December 1, 2022 |
| 2) Proposals Due | January 27, 2023 |
| 3) Interviews (if needed) | Feb 27, 2023 |
| 4) Notification of Results | March 13, 2023 |
| 5) Initiate Negotiations with Highest Ranked Team | March 20, 2023 |
| 6) Contract Award | April 3, 2023 |

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	20
Team Qualifications	40
Approach to the Work	30
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 (ten) 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 Matt 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 5:00 p.m. EST on Friday, January 27th, 2023, to Matthew Izzard at: mizzard@nastt.org.

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.