



Request for Proposals
Update NASTT's Cured-in-Place Pipe (CIPP)
Good Practices Guidelines
and
Training Course Materials

The North American Society for Trenchless Technology (NASTT) is requesting proposals from qualified firms to update its Cured-in-Place Pipe (CIPP) 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 Cured In Place Pipe (CIPP), Horizontal Directional Drilling (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 CIPP Good Practices Guidelines Publication (Publication) and Course Training Materials (Course) began their development in 2004 and were originally part of a training program developed by the Centre for the Advancement of Trenchless Technologies (CATT), located at the University of Waterloo. Installation methodologies, tube and resin systems, engineering methodologies, and technologies have advanced over the past several years, and significant updates need to be made so that the and Course materials are current and relevant. Therefore, this Request for Proposals (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 knowledge regarding CIPP rehabilitation.

Project Description

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 reputable manufacturers, suppliers, and contractors not on this list to ensure a complete list of technologies and methods is 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 – a brief course history and acknowledgement of previous authors
- 2) Introduction. This is intended to be a “big-picture” discussion of CIPP, its origins and early implementation, and subsequent growth in the industry. Firms should include a discussion of the lifecycle of CIPP and a flow chart to illustrate the various life cycle stages, potential technologies or methods used for rehabilitation, and their advantages and limitations. The introduction should also provide a clear explanation of what the Publication includes, does not include, and learning objectives.
- 3) Gravity Design (including ASTM F1216 Appendix X1, WRc SRM and ASCE MOP 145)
- 4) Resin Systems and Tube Construction
- 5) Technical Envelope
- 6) Installation Methodologies
- 7) Supplemental Construction Related Activities
- 8) Construction Footprint, Scheduling & Sequencing
- 9) QA/QC, Testing & Design Reconciliation
- 10) Environmental
- 11) Specialty Main Line CIPP Methodologies
- 12) Short Liner and Lateral Basics
- 13) Introduction to Pressure CIPP
- 14) Emerging Technologies. Technologies that are used in other countries but not yet widely available in North America, as well as innovative emerging North American technologies should be described in this section.
- 15) 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 by the proposer shall include, but not limited to, those listed below. The services include specific tasks as well as goals that the successful proposer is expected to strive to reach:

- 1) Project Management
 - a) Prepare budgets for each task and milestone for the Project.
 - b) Provide monthly milestone progress reports and a milestone delivery report to accompany each milestone invoice.
 - c) Lead and document a project scoping meeting to address both the publication and course material with members of NASTT’s CIPP committee.

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- d) Provide a detailed Project management plan and schedule, including milestones, major activities, and deliverables for the Project. The schedule should be updated on a quarterly basis.
 - e) Provide internal quality control on all work products submitted to NASTT.
 - f) Prepare agendas, lead Project meetings, and provide meeting minutes.
 - g) Furnish a response to all reviewer comments with subsequent deliverables.
- 2) Update Publication
- a) Update the Publication to reflect current technologies and engineering associated with rehabilitation of gravity sewer main lines via CIPP 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 CIPP Committee but reserves the right to make additional updates based on an ever-changing market.
- 3) Update Training Course Materials
- 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 however, it is anticipated that the slide deck will be a minimum of four hundred (400) slides. Slide decks shall be provided in sections, consistent with the Publication and Course outline. Slide deck shall 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 with anticipated teaching time associated with each section. 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 CIPP Committee.
- 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 proposer 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 proposer shall sign an “assignment” release. Release forms shall be provided by NASTT and each contributing member of the successful proposer’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 proposer will be given twelve (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 Scoping Meeting. It is anticipated that this meeting will be used to convey NASTT’s vision and to ensure consensus on the scope.
 - o Thirsty (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.
 - o Sixty percent (60%) Review Meeting – course PPT draft submitted prior to 60% review.
 - o Ninety percent (90%) Review Meeting
 - o Delivery of Final Publication and Course
 - o Eight (8) hour overview session of final deliverable

Review meetings will discuss both the publication and course and will need to include content for both deliverables – schedule to be outlined and agreed upon between the proposer and NASTT.

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) Provide a complete list of all companies and individuals (interested parties) engaged with. All engagement shall be fully documented and provided with the final deliverables.
- e) Quality Assurance.
- i) Proposers shall include a statement regarding their Quality Assurance plan, and be prepared to release quality reviews to NASTT upon request.
- f) Train the Trainers.
- i) Proposers shall include an eight (8) hour virtual review session with members of the CIPP Committee and NASTT CIPP trainers to review the Publication and Course materials after final delivery. This will serve as a Beta session of the course, with review and feedback.

Services to be Provided by NASTT

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

- 1) Provide a single point of contact for Project Management and communication.
- 2) Provide a subject matter lead who shall be significantly involved in the development of the material.

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- 3) Provide a team of industry professionals (i.e., NASTT CIPP Committee) to participate at key meetings and provide a vision for the Project.
- 4) Provide successful proposer access to the electronic format (Word and PDF) of the current Publication and any supporting instructors' notes; however, the successful proposer may not copy, reproduce, or otherwise use this material for personnel or any other use, without the expressed written consent of NASTT.
- 5) Provide NASTT's updated slide deck template for use to produce the Course slide deck using that template. The successful proposer 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 without the expressed written consent of NASTT.

Proposal Requirements

Proposers 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 and will receive a higher ranking as demonstration of ultimate quality of work products.

Proposals shall not exceed twenty (20) 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 eleven (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, if needed.
- 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 schedule per item 4c in the Scope of Work.
- 6) Resumes for each proposed team member. Resumes are limited to a two-page maximum.
- 7) 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. Proposers shall also incorporate a 10% retainage at the end of the project in their fee schedule.

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 proposer or anyone else without the expressed written permission of NASTT.

All costs associate with preparation of the proposal shall be the at the sole expense of the proposer.

RFP Schedule (Tentative)

The following is the current tentative schedule for the selection process:

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|---|-----------------|
| 1) Issue Request for Proposals | March 8, 2022 |
| 2) Proposals Due | March 31, 2023 |
| 3) Interviews (if needed) | Mid-April, 2022 |
| 4) Notification of Results | Mid-April, 2023 |
| 5) Initiate Negotiations with Highest Ranked Team | April 17, 2023 |
| 6) Contract Award | May 1, 2023 |

Selection Process and Criteria

The Committee reserves the right to waive formalities or to reject any and all proposals at its sole discretion. 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) The qualifications of a Subject Matter Expert, who's credentials and expertise in the field of CIPP will be heavily utilized to perform the work as outlined above.
- 3) Proposer's key staff and sub-consultant qualifications, knowledge, and ability to perform the work as outlined in the RFP.
- 4) Proposer's understanding of the Project as demonstrated by their project approach and responsiveness to the RFP.
- 5) Demonstrated ability to meet NASTT's desired timeframe.

| <u>Evaluation Criteria</u> | <u>Points</u> |
|----------------------------------|---------------|
| Project Manager's Qualifications | 10 |
| Subject Matter Expert | 30 |
| Team Qualifications | 20 |
| Approach to the Work | 35 |
| Schedule | 5 |

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 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.

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Please submit a PDF electronic copy of your response to this RFP by 2:00 p.m. EST on March 31, 2023, to Matthew Izzard at: mizzard@nastt.org.

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