



c/o State Coastal Conservancy
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July 10, 2023

REQUEST FOR QUALIFICATIONS (RFQ)
Parcel Tax Administration Services for the Measure AA

NOTICE IS HERBY GIVEN that the San Francisco Bay Restoration Authority (Authority) invites your firm to submit a Statement of Qualification (SOQ) for Parcel Tax Administration Services for the Measure AA Parcel Tax.

The RFQ documents for this project are available on the San Francisco Bay Restoration Authority website at: <https://www.sfbayrestore.org/announcements>. Responses should be submitted in accordance with the instruction set forth in the RFQ.

Interested firms must submit their Proposal by 5:00 pm on July 31, 2023, in accordance with the instructions contained in the RFQ.

SFBRA Point of Contact: Karen McDowell
San Francisco Bay Restoration Authority
Bay Area Metro Center,
375 Beale Street, San Francisco, CA 94105
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(415) 778-6685

Thank you for your interest.

Sincerely,

DocuSigned by:

Amy Hutzel

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Amy Hutzel
Executive Officer

I. Description of the San Francisco Bay Restoration Authority, State Coastal Conservancy, Association of Bay Area Governments, San Francisco Estuary Partnership, and Metropolitan Transportation Commission

The San Francisco Bay Restoration Authority (“Authority”) is a regional entity established by the San Francisco Bay Restoration Authority Act, California Government Code section 66700 et seq. (“Restoration Authority Act”) that is charged with raising and allocating funds for the protection and enhancement of tidal wetlands and other wildlife habitat in and surrounding the San Francisco Bay and for related public access and flood protection and that successfully placed the San Francisco Bay Clean Water, Pollution Prevention and Habitat Restoration Measure (“Measure AA”), a regional special tax measure, on the June 2016 ballot to raise such funds.

The Authority is staffed by employees of the State Coastal Conservancy (“Conservancy”) and the Metropolitan Transportation Commission (“MTC”). The MTC employees are acting on behalf of the Association of Bay Area Governments (“ABAG”) through its San Francisco Estuary Partnership (“SFEP”) program. The Authority staffing is pursuant to a Joint Powers Agreement between the Authority, Conservancy, and ABAG to reduce redundancy and increase efficiency.

The Conservancy is a state agency established pursuant to Division 21 of the California Public Resources Code that is authorized to award grants in the nine-county San Francisco Bay Area to help achieve Division 21’s goals for the San Francisco Bay Area, which include the protection, restoration and enhancement of natural habitats and improved public access to and around San Francisco Bay.

ABAG is a joint powers authority of the cities and counties of the nine-county San Francisco Bay Area with the authority to perform regional and subregional planning and to coordinate with other governmental entities including federal, state and regional agencies via SFEP. SFEP was established by the State of California and the United States Environmental Protection Agency under the Clean Water Act’s National Estuary Program and is a collaboration of local, state, and federal agencies, non-governmental organizations, academia, and business leaders working to protect and restore the San Francisco Estuary. SFEP’s work is guided by the development of the Estuary Blueprint, a comprehensive, collective vision for the Estuary’s future. SFEP is a program of ABAG.

MTC is a regional transportation planning agency established pursuant to California Government Code Section 66500, et seq. On May 30, 2017, MTC and ABAG entered into a Contract for Services (“CS”) under which MTC assumed staff functions for ABAG. Effective July 1, 2017, the staffs of ABAG and MTC were consolidated. MTC staff now serve both ABAG and MTC.

II. Project Description

The Authority placed Measure AA on the ballot in 2016. Measure AA, is a 20-year, \$12 parcel tax which raises approximately \$25 million annually, or \$500 million over twenty years, to fund restoration projects in the San Francisco Bay. It passed with over 70% approval across the nine-

county Bay Area and went into effect in 2017. The Authority is looking for a consultant to provide tax administrative services as described in the services required.

III. Services Required

The purpose of this RFQ is to retain one highly qualified firm or team to provide the services required to administer the Measure AA parcel tax in all nine counties. The services will include the following activities:

- 1) **Data Gathering:** Gather and review data pertinent to the calculation and billing of the levy. Data will be obtained from various sources such as each County Assessor's Secured Roll, assessor's parcel maps and public databases as determined to be necessary based on the requirements of the formula.
- 2) **Quality Control:** Perform cross-reference tests looking at the various data sources, land use codes, and other pertinent information to ensure the best and most accurate levy application.
- 3) **Database Maintenance:** Maintain and periodically update a database of all parcels within the service area and relevant parcel information.
- 4) **Levy Calculation:** Calculate the annual tax levy for each parcel within the nine counties following the guidelines established in the formula/measure.
- 5) **County Submittals:** Submit the levies to each county Auditor Controller in the required electronic format. Levies rejected by the county Auditor Controllers will be researched and resubmitted for collection on the county Tax Rolls. Any parcels that are not submitted to a county for collection will be invoiced with payment to be directed to the agency or designee.
- 6) **Reporting:** Provide a simple annual Levy Report. This Levy Report can be used as the basis for compliance with State Government Code Section 50075.3.
- 7) **Consulting Support:** provide a toll-free phone number for placement on the County tax bills and for use by agency staff, other interested parties and all property owners. Consultant staff should be available to answer questions regarding the levy.

IV. Time Frame

Services are anticipated to begin on September 1, 2023. Services will end on or about December 31, 2028.

V. Compensation

Consultants must submit a budget for the proposed services. Please provide a budget for the initial services between September 1, 2023 and December 31, 2023 and a budget for annual services for each calendar year through December 31, 2028. Consultant must be a bona-fide independent consultant. Consultant is responsible for payment of applicable state and federal taxes. Services will be paid for on an hourly basis with other direct costs to be billed on an as expended basis. All payments will be based on completion of contract tasks. All payments will be in arrears.

VI. RFQ Evaluation and Selection Criteria

Every Statement of Qualifications (SOQ) will be evaluated according to the criteria below. The Numerical scores will be tabulated for each offer.

1) Relevant Qualifications and Experience (45 points) - The Consultant will be evaluated based on the level of experience and background in parcel tax administration services. Experience must demonstrate ability to coordinate many partners and adherence to project schedules, deadlines, and budgets.

2) Education and Professional Background (20 points) - The Consultant team will be evaluated based on professional qualifications and education, credentials, and professional associations sufficient to demonstrate a high level of relevant expertise. Resumes of key staff should be included. Staff availability for work on this project should be described.

3) Statement of Project Approach (35 points) - The Consultant will be evaluated based on the adequacy of the material submitted in response to the services required as described in this Statement of Qualifications (SOQ). Consultant must demonstrate understanding of the project and tasks to be performed, project approach, budget, and schedule.

Statements must respond to all the requirements of this request and must include all information specifically required in all sections of this request. Results of reference checks will determine if consultant qualifies for award.

A Selection Committee will evaluate the SOQs. The Authority intends to evaluate the SOQs generally in accordance with the criteria itemized above.

The Authority will negotiate with the highest ranked firm. If the Authority is unable to negotiate a satisfactory agreement with the top-ranked firm, the Authority intends to negotiate with the other firms according to their ranking until it has reached a satisfactory contractual agreement with the firm.

VII. Contract Award

Contract award shall be made to the responsible Consultant on the basis of the evaluation criteria listed above and whose statement is most advantageous to the Authority. The Authority's objective is to obtain the highest qualified Consultant to achieve the objectives within a reasonable cost. Qualifications and experience as a whole are more important than cost.

This request does not commit the Authority to award a contract. We reserve the right to reject any or all SOQs received in response to this request. Award of contract may not be made to any applicant unless an agreement can be secured for all general and special contract provisions. Applicants are informed that the award of any contract as the result of this solicitation is contingent upon the availability of funds.

VIII. What to Submit

To provide an objective, fair review of candidate submittals, statements are to include only the following information:

- 1) Transmittal Letter - Normal transmittal letter, covering highlights and unique features of your statement. Any special terms and conditions of the offer should also be

summarized here. Letter should include the name and telephone number of a contact person and your office address.

Length: One (1) Page Maximum.

2) Statement of Qualifications - Provide a definitive statement to respond to the requirements as stated in this request. This must describe in detail the procedures and methods that will be used to provide the services requested, preferably drawing on past experience/work conducted by the applicant. Proponent should describe experience working with local governments and public works departments.

Length: Four (4) Pages Maximum.

3) Educational and Professional Background - Provide a summary of project staff's educational background, including degrees. Also include special professional and/or project experience. Resumes should be included.

Length: Three (3) Pages Maximum.

4) List of Client References - Provide a list of clients to be used as references for your work, including contact name, address, telephone number, nature of job, length of engagement, amount (e.g. 1 year, \$ _____).

Length: One (1) page maximum.

5) Budget – Must include total funds requested and amount budgeted per initial time period from September 1, 2023 – December 31, 2023, and then for each calendar year from January 1, 2024 through December 31, 2028. Provide your standard hourly billing rate (s) for all personnel proposed for the project, including overhead. Identify all costs for which you will seek reimbursement or fees that you propose to charge in connection with the work.

Length: Two (2) pages maximum.

IX. Submittal of SOQ

We require an electronic copy (preferably as a single .pdf document) of your SOQ package submitted by email to Karen McDowell at karen.mcdowell@sfestuary.org. Interested firms must submit their SOQ electronically by July 31, 2023, 5:00 p.m. Proposals received after that date and time will not be given consideration. Questions may be directed to Karen McDowell at (415) 778-6685.