

EPA **Technical Assistance Grants (TAG): How to Find and Select a Technical Advisor**



The Superfund Technical Assistance Grant (TAG) Program provides funds to eligible community groups living near Superfund sites so they can help the affected public become better-informed participants in the Superfund process. TAG funds are available to pay for independent technical advisors who analyze and explain information about the site. The TAG recipient uses the technical advisor's explanations to keep the entire community informed about developments at the site.

This fact sheet answers the questions groups often ask about how to find and select a technical advisor, but does not provide all the information you need to meet the requirements of your TAG. Contact your EPA project officer/regional TAG coordinator for additional information.

Your group determines the role of the technical advisor based on your community's needs and concerns. Possible requirements include:

- Reviewing and interpreting site-related documents and data regarding the cleanup of your site.
 - Interpreting the health aspects associated with information found in site-related documents.
 - Analyzing community plans and preferences regarding future land use and interpreting redevelopment information developed as part of the Superfund cleanup.
- Interpreting information about relocation at sites where there is a reasonable possibility that relocation will be selected as a remedy.
- Meeting with your group to explain technical information about the site.
- Participating in public meetings to help clarify site information.
- Helping your group communicate your concerns and preferences to EPA, state agencies, and polluting parties.



- Participating in site visits to gain a better understanding of cleanup activities.
- Attending meetings and hearings directly related to site conditions.
- Participating in health and safety training.

You cannot use TAG funds to pay a technical advisor to generate new primary data, including well drilling and testing, or to generate new health data through biomedical testing, clinical evaluations, health studies, surveillance, registries, or public health interventions.

Your group should choose a technical advisor who will provide you with an unbiased, independent review of site-related information. You may need to contract with more than one technical advisor. Advisors should be qualified in areas related to the type of contamination and specific issues relevant to your site. For example, at a site with water contamination, a technical advisor with experience in hydrology or hydrogeology would be appropriate. An expert in land-use planning, economic development, or environmental planning would be appropriate where redevelopment issues related to the site are a concern.

- Hospitals
- Universities
- Professional and technical societies
- Environmental groups
- Trade magazines and journals
- State and local health departments
- Chambers of Commerce
- The Yellow Pages
- Consulting firms
- Public libraries
- Historically Black Colleges and Universities
- Other TAG recipients



What Qualifications Should I Look for in a Technical Advisor?

The technical advisor should have the following qualifications:

- Demonstrated knowledge, training, and experience working with hazardous or toxic waste issues, or redevelopment, public health, or federal relocation policies and relocation-related issues.
- Academic training in a relevant discipline (for example, biochemistry, toxicology, environmental engineering, hydrology, public health, etc.).
 - Public health technical advisors must have received training from an accredited school of public health, medicine, or a related discipline.
 - Relocation technical advisors should have demonstrated knowledge, training, and experience in relocations, including knowledge of the Uniform Relocation Act of 1970, and working with developers, brokers, and lenders; and demonstrated knowledge of appraisals, title searches, and state and local tax laws.
- The ability to translate technical information into language your community can understand.
- Not debarred or suspended as a federal contractor.

Recipients of federal grants are required to compete when selecting contractors, including technical advisors or a grant administrator, or when purchasing goods and services. If only one qualified bidder can be located, that bidder can be selected noncompetitively.

You also must take steps to ensure that minority-owned, woman-owned, and small businesses have an opportunity to compete. These “positive steps” are outlined on page 5. Contact your EPA project officer/regional TAG coordinator for additional information.



THE COMPETITIVE SELECTION METHOD

TAG recipient groups must use a competitive process when selecting contractors, including technical advisors, or when purchasing goods and services. The specific steps required vary depending on the dollar value of the contract or purchase, described below. *The only time you can award a contract without competition is after you have solicited proposals or bids from several sources and found only one qualified candidate or one adequate bidder.*

For each purchase or contract valued at \$1,000 or less:

- You must determine only that the price is reasonable, by “comparison shopping.”
- Keep a list in your files of the prices found at various sources to demonstrate that the price you are paying is reasonable.

Example: Your group has prepared a newsletter and needs a print shop to design and reproduce copies of it. You call two or three vendors and ask each what it would cost to complete your print order. You jot down the date of your phone calls, the names of the vendors, and the prices they quote. Keep your notes in your permanent files.

For each purchase or contract valued at more than \$1,000 but less than \$25,000:

- You must obtain oral or written proposals or bids from two or more qualified sources.
- Document this process in detail in your files. For example, write a short memo for your files listing the name of each bidder and his/her bid, and/or file copies of individual written proposals or bids received.

Example: You contracted with one technical advisor for the hydrogeology and engineering work that you need at your site. This contract does not include the health sciences or toxicology work included in your approved TAG work plan, and you now need to have the risk assessment from the site reviewed. Because you estimate a contract for this single task will cost \$3,000, you ask two toxicologists to submit resumes describing their qualifications and a bid specifying what he or she will charge for the work. Keep the written submissions in your files, and prepare a memo to the file describing your reason(s) for selecting the particular bid or proposal for award. If you ask for oral quotations, make a written record of the prices the competitors propose and prepare a short memo describing your reason(s) for the final selection.

For each purchase or contract over \$25,000 but less than \$100,000:

- You must obtain written proposals or bids from three or more qualified sources. Your file documentation must include copies of all ads placed, the names and addresses of the individuals/firms who received solicitations, copies of all proposals or bids, and your written evaluation of the competing offers and the reason(s) for your final selection.

Example: You need the services of a technical advisor or environmental consulting firm whose services will cost more than \$25,000. (NOTE: The total amount of this contract must not exceed the amount included for a technical advisor in your approved TAG budget.)

For each contract valued at over \$100,000:

- You must follow the procurement rules outlined in 40 CFR Part 30, EPA’s general grant regulations for nonprofit organizations. It is rare that TAGs will issue contracts of this size. Contact your EPA project officer/ regional TAG coordinator if you need information about these requirements.



THE NON-COMPETITIVE SELECTION METHOD

- First, follow the appropriate competitive procedures for the dollar value of the proposed contract or purchase.
- If you receive only one responsive bid or proposal in response to your solicitation, promptly notify your EPA project officer/regional TAG coordinator. You may be asked to send a letter to your EPA regional office documenting that the one responsive bid or proposal you received was from a qualified source who proposed a reasonable cost or price. After you get EPA's written approval, you may award a contract to the one responsive bidder/offeror.

Recipients of federal grants must take steps to encourage small, minority, and woman-owned businesses to compete for their contracts and purchases. Taking the “positive steps” outlined here will show that your TAG group has done its best to find minority-owned, woman-owned, and small businesses.

1. Place minority-owned, woman-owned, and small businesses on your mailing list.
2. Send your requests for bids or proposals and advertisements for a technical advisor to historically black colleges and universities and historically minority schools and universities within a reasonable distance from your site.
3. Advertise in newspapers and media that reach minorities or that are read by people who live within a reasonable distance from your community. When working with a large firm, ask whether the firm intends to work with small, minority, and woman-owned businesses.
4. Contact local government offices within your area to identify qualified minority-owned, woman-owned, and small businesses.
5. Divide tasks in large contracts so that minority-owned, woman-owned, and small businesses can participate.
6. Contact the Small Business Administration and the Department of Commerce's Minority Business Development Agency (MBDA) for help.
7. Require your technical advisor to also take positive steps if he or she subcontracts with other professionals to provide services to your TAG group.

As a TAG recipient, you must submit an annual report to EPA about the “positive steps” you have taken to procure services or goods from minority-owned and woman-owned businesses. In this report, you also can include the “positive steps” you have taken to procure from small businesses, but this is not required. This report can include records of where you sent job announcements for technical advisors and records of where you placed advertisements for technical advisors.

Visit the TAG program web site at: <http://www.epa.gov/superfund/community/tag/contacts.htm> to contact the TAG coordinator for your region. The TAG coordinator will be available to further assist your group.