

# Automated Meter Infrastructure (AMI) Solution for the ConnectH2O Program

Fred Flores

Contract Administrator, SAWS

Marisol V. Robles

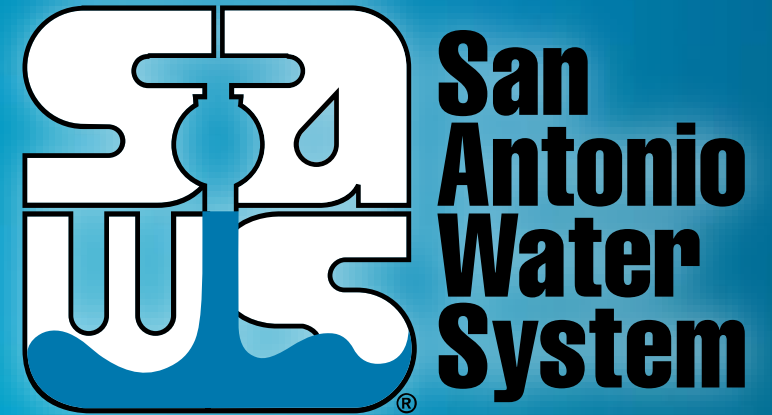
SMWVB Program Manager, SAWS

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Executive Consultant, VASS Solutions



Pre-Submittal Conference

December 10, 2019

MAKING SAN ANTONIO  
**WATERFUL**



# Oral Statements

- Oral statements or discussions during this Pre-Submittal Conference will not be binding, nor will they change or affect the RFCSP or the terms and conditions of the contract. Changes, if any, will be addressed in writing only via an Addendum.

# General Information

- Non-mandatory Pre-Proposal Conference
- The presentation information will be posted on SAWWS website
- Professional Services being procured through Request For Competitive Sealed Proposal (RFCSP) method
- This project is funded by the Texas Water Development Board (TWDB)

# Project Objective

The San Antonio Water System (SAWS) is requesting competitive sealed proposals from qualified firms to provide technology and services in the planning and implementation of an Advanced Metering Infrastructure (AMI) Solution for the ConnectH2O Program. This initiative will automate SAWS' current 538,152 water meters, plus future growth that will occur across the SAWS service area and will be identified as the SAWS ConnectH2O Program. Under the ConnectH2O Program, SAWS seeks to:

- Through this RFCSP:
  - Implement an Advanced Metering Infrastructure (AMI) Solution
  - Potentially procure new static water meters
- Through other RFSCPs issued concurrently:
  - Procure and implement a Meter Data Management System (MDMS); and
  - Procure and execute End Point Installation (EPI) Services.



# RFCSP Schedule



# Submitting a Response

- Submit hard copies
  - 1 original and 14 copies
- Include 2 USB flash drives of the original proposal, which shall include:
  - All pages of the proposal
  - Excel version of the Pricing Workbook
  - Excel version of the Technical & Functional Workbook
  - Clout VTAQ Questionnaire
- Reference the RFCSP document to determine what additional items are required
- Page limit of one hundred (100) per proposal\*
  - Must be securely bound by a means other than 3-ring binders
  - Use 8 1/2 x 11 portrait format (11" x 17" permitted where warranted)

\*Does not include required forms or workbooks

# Submitting a Response

## Helpful Reminders

- Thoroughly read the RFCSP document prior to submitting your proposal
- Ensure all fields of the Technical & Functional Workbook, as well as AMI Pricing workbook are filled out
- Utilize the Submittal Response Checklist to ensure all required documents are inserted provided
- Contact the SMWVB Program Manager for assistance, if necessary, including TWDB
- Perform a thorough QA/QC on your proposal prior to submitting

# Addenda

- Register as a vendor with SAWS Vendor Registration and Notification
- Subscribe using the Notify Me button the Project page to be notified when updates (including Addendums) are posted
- More than one (1) Addendum may be posted
- Check SAWS website often and prior to submitting your proposal
- Known Addendum changes are:
  - Responses to questions



# Submittal Deadline

- Submittal deadline is January 22, 2020 at 11:00 am (CT)
- Solicitation number, solicitation name, date and time of the deadline should be clearly identified on the outside of the submittal package
- Deliver to 2800 U.S. Highway 281 North, Customer Service Building:
  - Deliver to Counter Services in the Customer Service department
  - SAWS recommends submitting your proposal at least two (2) hours prior to the deadline
  - Make arrangements early if mailing your proposal
- Late responses will not be accepted, and will be returned unopened

# Communication Reminders

- No communication regarding the RFCSP with the following:
  - Project Consultant – VASS Solutions
  - SAWS Project Manager
  - SAWS Technical Representatives
  - Any other SAWS staff, managers, directors or VPs
  - City Council member or staff
  - SAWS Board of Trustees
- No phone calls, emails, letters, direct/indirect discussion of the RFCSP
  - If submitting for the RFCSP and/or doing work for SAWS, indicate this when speaking with SAWS staff, but refrain from discussing the RFCSP
- From release of the RFCSP to Board Award

# Request for Feedback

- Feedback policy
  - Requests for score analysis and/or debriefings shall be submitted in writing
  - Respondents may request one (1), thirty (30) minute debrief
  - Will be provided after the SAWS Board of Trustees approves the contract award

# Contract Requirements

- A Bid Bond is required with the submission of Respondent's Proposal
- Adherence to all Texas Water Development Board (TWDB) Requirements
  - Respondents should thoroughly review all TWDB attachments to the RFCSP
    - American Iron and Steel Requirements
    - Disadvantaged Business Enterprise Requirements
    - TWDB required forms
- Reference Exhibit A of the RFCSP, Insurance Requirements, to review General Liability, Professional Liability, and Security and Privacy Liability required coverage limits.
- Review the Sample Contract and all Exhibits.
  - Exceptions, if any, must be provided when submitting a proposal.



# TWDB Requirements

The Texas Water Development Board's (TWDB) Clean Water and Drinking Water State Revolving Fund programs receive federal funding from the U.S. Environmental Protection Agency (EPA). These funds are used to provide Financial assistance for wastewater and drinking water projects. As a condition of federal grant awards, EPA regulations require that funding recipients (municipalities, towns, public water authorities, nonprofit water supply corporations, etc.) and sub recipients (prime consultants, prime contractors, and subcontractors) make a good faith effort to award a fair share of work to DBE's who are Minority Business Enterprises (MBEs) or Women owned Business Enterprises (WBEs) whenever procuring construction, supplies, services, and equipment.

# TWDB DBE Aspirational Fair Share Goal

<b>Categories</b>	<b>MBE</b>	<b>WBE</b>
Construction	19.44%	9.17%
Equipment	16.28%	11.45%
Supplies	25.34%	8.82%
Services	20.41%	13.66%

# Required TWDB Forms for DBE Participation

- **TWDB-0216 (from Prime Consultants/Contractors):** Indicates all businesses solicited for procurement, their contact information, and their MBE/WBE status.
- **TWDB-0217 (from Prime Contractor)** certifies that the Prime Contractor understands they **must** follow the Six Good Faith Efforts and attempt to meet the Fair Share Objectives for MBE/WBE participation.
- **TWDB-0373 (from Prime Consultants/Contractors)** identifies all businesses awarded a subcontract, their contact information, their MBE/WBE status, an actual or anticipated executed contract date, and contract amount. *Note: Any businesses operating as brokers may not be listed on the TWDB-0373 as an MBE or WBE.*

# TWDB-0216

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FOR OFFICE USE ONLY  
 Commitment # \_\_\_\_\_

TWDB-0216  
Revised 11/13/2017

**TWDB-0216  
TEXAS WATER DEVELOPMENT BOARD  
AFFIRMATIVE STEPS SOLICITATION REPORT**

**I. PROJECT INFORMATION**

TWDB Project Number	Applicant/Entity Name	Total TWDB Funding Request	Program Type (insert "X" for all that apply)
			<input type="checkbox"/> Drinking Water SRF (DWSRF) <input type="checkbox"/> Clean Water SRF (CWSRF)

**Project Name:** \_\_\_\_\_

**Solicitation By:**  Applicant/Entity OR  Prime Contracted Business: \_\_\_\_\_

**Project Phase:**  Prior to Closing  Release of funding for PADs  Construction Contract # \_\_\_\_\_

**II. SOLICITATION METHOD(S) UTILIZED**  
 At least two methods of solicitation are required. Select the method(s) utilized for the solicitation. Copies of the actual postings, direct contact email/phone log, etc. must be attached to this form as support documentation for each method used. Failure to adequately follow these steps will result in the requirement to complete additional steps in order to become compliant.

Newspaper Advertisements   
  Meetings or Conferences   
  Trade Association Publications  
 Minority Media   
  Internet & Web Postings   
  Other Government Publications  
 Direct Contact by Phone, Fax, USPS Mail, or Email\*

*\*If using direct contact, entities must solicit to a **minimum of 3** businesses/firms (at least one being a DBE) for each category of contract sought (i.e., construction, supplies, equipment, or services) to demonstrate a Good Faith Effort.*

**III. PROJECT BIDDERS LIST:**  
 List on the following table, or provide on a separate list, each business entity directly solicited for procurement or that submitted a bid for consideration.

<b>Instructions for Columns 1 - 4</b>	1 - Full business name (line one) & point of contact (line two) 2 - Business address 3 - Telephone number 4 - Email address for the business
<b>Instructions for Column 5</b>	Enter one of the following procurement or contract categories: <b>CONSTRUCTION – SUPPLIES – EQUIPMENT – SERVICES</b> <i>For detailed definitions, review guidance document, TWDB-0210.</i>
<b>Instructions for Column 6</b>	Enter the type of business: <b>MBE</b> - Minority Business Enterprise, <b>WBE</b> - Women-owned Business Enterprise, or <b>OTHER</b> - Company or firm is Non-MBE or WBE

**Notice:** Entities receiving State Revolving Fund financial assistance must create and maintain a Bidders List if the entity is subject to, or chooses to follow, competitive bidding. The Bidders List must include all firms that bid or quoted on contracts under EPA assisted projects, including both MBE/WBEs and non-MBE/WBEs. Entities must keep all Bidders Lists until project completion or the recipient is no longer receiving EPA funding under the loan, whichever is later. Entities with loans totaling less than \$250,000 during a state fiscal year are exempt from the Bidders List requirement, but must still meet DBE program requirements. The Bidders List requirement also applies to all Prime Contracted Businesses/Firms that make subcontracting.



# TWDB-0217

FOR OFFICE USE ONLY: Commitment #	<b>TWDB-0217</b>	TWDB-0217 Revised 08/14/2018
<b>TEXAS WATER DEVELOPMENT BOARD (TWDB) PRIME CONSULTANT/CONTRACTOR CERTIFICATION</b>		
<b>I. PROJECT INFORMATION</b>		
TWDB Project Number	Applicant/Entity Name	Total of TWDB Funding
		Program Type (insert "X" for all that apply)
		<input type="checkbox"/> Drinking Water SRF (DWSRF)
		<input type="checkbox"/> Clean Water SRF (CWSRF)
Prime Consultant/Contractor: _____		
Contract Number: _____ Contract Amount: _____		
<b>II. GOOD FAITH EFFORT (Applicable to all subcontracts awarded by the prime contractor/consultant)</b>		
I understand that it is my responsibility to comply with all state and federal regulations and guidance in the utilization of Minority and Women-owned Businesses in procurement. I certify that I will make a "good faith effort" to afford opportunities for Minority Business Enterprise (MBE), and Women-owned Business Enterprise (WBE) by:		
1.	Including qualified MBEs and WBEs on procurement solicitation lists	
2.	Soliciting potential MBEs and WBEs	
3.	Reducing contract size/quantities when economically feasible to permit maximum participation by MBEs and WBEs	
4.	Establishing delivery schedules to encourage participation by MBEs and WBEs	
5.	Using the services and assistance of the Small Business Administration, Minority Business Development Agency, U.S. Department of Commerce, and Texas Marketplace	
6.	Submitting documentation to the Applicant/Entity to verify good faith effort, steps 1-5.	
<input type="checkbox"/>	<b>EXCEPTION:</b> As the Prime Consultant/Contractor, I certify that I have reviewed the contract requirements and found no available subcontracting opportunities. I also certify that I will fulfill 100 percent of the contract requirements with my own employees and resources. (Check if applicable)	
Signature – Prime Consultant/Contractor	Title (print legibly)	Certification Date
<b>III. PROJECT PARTICIPATION ESTIMATES</b>		
The Cost Categories mentioned below are goals. These goals are neither standards nor quotas. Recipients of financial assistance are not required to meet the fair share objectives. They must, however, acknowledge that they are aware of and are actively pursuing the fair share objectives with their procurements.		
Cost Category	Potential MBE Participation Goal	Potential WBE Participation Goal
Construction	19.44%	9.17%
Supplies	25.34%	8.82%
Equipment	16.28%	11.45%
Services	20.41%	13.66%
The fair share goals listed above are required by 40 CFR Part 33 Subpart D and are directly negotiated with EPA Region 6. Entities receiving federal financial assistance are subject to the TWDB's goals and may not be substituted with other agency or program goals.		
<b>IV. TWDB APPROVAL SIGNATURE</b>		
Signature indicates the form meets DBE Requirements.		
DBE Coordinator	Approval Date	

# TWDB-0373

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Commitment # \_\_\_\_\_

TWDB-0373  
Revised 11/13/2017

**TWDB-0373  
TEXAS WATER DEVELOPMENT BOARD  
PARTICIPATION SUMMARY**

**I. PROJECT INFORMATION**

TWDB Project Number	Applicant/Entity Name	Total TWDB Funding Request	Program Type (insert "X" for all that apply)
			<input type="checkbox"/> Drinking Water SRF (DWSRF) <input type="checkbox"/> Clean Water SRF (CWSRF)

**Project Name:** \_\_\_\_\_

**Solicitation By:**  Applicant/Entity OR  Prime Contracted Business: \_\_\_\_\_

**Project Phase:**  Prior to Closing  Release of funding for PADs  Construction Contract # \_\_\_\_\_

**Instructions**

<b>Column 1</b>	Enter the full name, street address, city/state/zip for each firm awarded a contract for the project.
<b>Column 2</b>	Enter one of the following procurement or contract categories: <b>CONSTRUCTION – SUPPLIES – EQUIPMENT – SERVICES</b>
<b>Column 3</b>	Enter the type of business: <b>MBE (Minority Business Enterprise), WBE (Women-owned Business Enterprise), or OTHER (NOTE: OTHER = Company or firm is Non-MBE or WBE)</b>
<b>Column 4</b>	Enter the exact amount of the awarded contract.
<b>Column 5</b>	Enter the exact date the contract was executed or the proposed date of contract execution.

If valid MBE/WBE firms are awarded contracts, a copy of their certification is required to be attached with this form for each MBE/WBE business listed.

**Notice:** Brokers may not be listed below as an MBE or WBE. A broker is a firm that does not perform, manage, or supervise the work of its sub/contract in a manner consistent with the normal business practices for sub/contractors in its line of business. For more specifics, review guidance document, TWDB-0210.

**II. LIST OF ACTUAL CONTRACTS/PROCUREMENTS**

	Column 1 Name & Address of Contracted Firm/Vendor	Column 2 Procurement Category	Column 3 MBE/WBE Status	Column 4 Contract Amount (\$)	Column 5 Contract Execution Date
1.					
2.					
3.					
4.					
5.					
6.					

*(Table continues on the next page)*

# Accepted Certification

- Disadvantaged Business Enterprise (DBE):

An entity owned or controlled by a socially and economically disadvantaged individual as described by Public Law 102-389 (42 U.S.C. §4370d) or an entity owned and controlled by a socially and economically disadvantaged individual as described by Title X of the Clean Air Act Amendments of 1990 (42 U.S.C. §7601 note); a Small Business Enterprise (SBE); a Small Business in a Rural Area (SBRA); or a Labor Surplus Area Firm (LSAF), a Historically Underutilized Business (HUB) Zone Small Business Concern, or a concern under a successor program. This term includes Minority Business Enterprises (MBE) and Women-owned Business Enterprises (WBE).

# DBE Sources

- **Any State or Federal Source that certifies DBEs**
- **No Local Requirement**



## 6 Good Faith Efforts

- (1) Ensure DBEs are made aware of contracting opportunities to the fullest extent practicable.
- (2) Make information on forthcoming opportunities available to DBEs...in a way that encourages and facilitates participation by DBEs in the competitive process.
- (3) Consider in the contracting process whether businesses competing for large contracts could subcontract with DBEs.
- (4) Encourage contracting with a consortium of DBEs when a contract is too large for one of these businesses to handle individually.
- (5) Use the services and assistance of the Small Business Administration (SBA) and the MBDA of the Department of Commerce.
- (6) If the Prime Contractor awards subcontracts, require the prime contractor to take the complete steps (1) through (5) listed above.

# Required DBE Solicitation Methods

At least two of the seven methods must be used.

- Newspaper Advertisements
- Minority Media
- Direct Contact (Phone, Fax, USPS Mail, or Email) (Three Biz Min./One must be a DBE.)
- Meetings or Conferences
- Internet & Web Postings
- Trade Association Publications
- Other Government Publications

# Good Faith Effort Plan (GFEP) FAQs

**Q: Are the DBE goals mandatory?**

A: No, but we ask prime consultants to do their best with good faith outreach efforts. Proof of outreach efforts is required with the submittal.

**Q: What if I am having trouble finding DBE subcontractors?**

A: Please email the SMWVB Program Manager with the scopes of work you are seeking. You will receive lists of local SMWVB-certified firms to contact.

**Q: What if my business is DBE-certified? Do I need to find DBE subs?**

A: If your firm is DBE-certified, you must still perform at least two DBE Solicitation Methods and abide by the Six Good Faith Outreach Efforts prescribed by the TWDB if you will subcontract any part of the job. The GFEP and the TWDB DBE forms are required documents.

**Q: What if I have questions about the GFEP or TWDB Requirements?**

A: Please contact the SMWVB Program Manager at 210-233-3420, or at [Marisol.Robles@saws.org](mailto:Marisol.Robles@saws.org). GFEP questions can be asked at any time before the submittal is due.

# SMWVB Requirements

## RFCSP Scoring:

### –Up to 5 Points

- Outreach to DBE's through at least two (2) of the "Six Good Faith Efforts", as prescribed by TWDB – **1 Point**
- Consideration of Debundling Scopes of Work for DBE Participation, provided by Respondent on GFEP – **1 Point**
- Proposed DBE Participation on the Contract – **3 Points**



# SMWVB Post-Award

- Payments made to subconsultants, subcontractors, and suppliers (SMWVBs and Non-SMWVBs) will be reported using SAWS Subcontractor Payment and Utilization Reporting (S.P.U.R.) System. This is a contractual requirement.

# Post Award: Subcontractor Payment & Utilization Reporting (S.P.U.R.) System & Subcontractor Changes

## [WWW.SAWS.SMWBE.COM](http://WWW.SAWS.SMWBE.COM)



# DBE Questions

- Questions related to the SMWVB Program, completion of the Good Faith Effort Plan (GFEP), or scoring of the GFEP may be directed to the SMWVB Program Manager until the RFCSP is due.

**Marisol V. Robles**

SMWVB Program Manager

Email: [Marisol.Robles@saws.org](mailto:Marisol.Robles@saws.org)

Telephone: 210-233-3420

# Respondent Questions

- Must be submitted in writing via e-mail no later than December 13, 2019 by 2:00 pm to:

**Fred Flores**

Contract Administration Department

San Antonio Water System

[Fred.Flores@saws.org](mailto:Fred.Flores@saws.org)



# Selection Process

- Technical Evaluation Committee (TEC) will review proposals to determine the Minimum Submission Requirements are met (Section I. F of the RFCSP).
  - If SAWS determines that the proposal does not, the Respondent will be deemed non-responsive and notified.
- TEC will review, evaluate and rank proposals according to the numerical scoring system based on evaluation criteria (see Section II. D.), excluding the proposal
- The Selection Committee will review the ranking of the proposals and select 2 or more firms to be shortlisted.
- SAWS will evaluate and score the AMI Price Proposals.
- Firms deemed most qualified by SAWS based on the technical evaluation and compensation may be interviewed by the Selection Committee.

# Minimum Submission Requirements

- Respondent must provide a minimum of three (3) completed AMI references from North America, with at least one (1) from the last 18 months where Respondent has implemented an AMI solution for a water utility of 50,000 endpoints or greater.
- Respondent will propose an AMI solution that is commercially available by the start of the pilot phase with the requested features contained within this RFCSP.
- Respondent shall propose a static water meter solution.
- Respondent shall provide a water module battery that is capable of a 20-year life expectancy.
- Respondent shall commit to performance metrics outlined in Tab 8 Performance Metrics (SLAs) of the SAWS' AMI Solution and Services - Functional and Technical Specifications.

# Scoring Criteria

– Background, Experience and Past Performance	25 pts
– Project Approach, Team Experience	20 pts
– Functional, Technical and Performance Requirements Capabilities	30 pts
– AMI Price Proposal	20 pts
– DBE Outreach and Participation	5 pts
<b>Total:</b>	<b>100 pts</b>

# Scoring Criteria

## Background, Experience and Past Performance

- Respondent will provide a response to this evaluation criteria by thoroughly completing the SAWS AMI Solution and Service - Functional and Technical Specifications workbook, Tabs I.0, Section I.1, “General Offeror Qualifications – Background, Experience and Past Performance”.
- The SAWS AMI Solution and Services – Functional and Technical Specifications workbook is available for download on the SAWS project webpage for this RFCSP.



# Scoring Criteria

## Project Approach, Team Experience

- Respondent will provide a response to this evaluation criteria by thoroughly completing the SAWS AMI Solution and Services - Functional and Technical Specifications workbook, Tab 1.0, Section 1.3, “General Offeror Qualifications - Project Understanding & Approach; Team Experience”.
- The SAWS AMI Solution and Services – Functional and Technical Specifications workbook is available for download on the SAWS project webpage for this RFCSP.

# Scoring Criteria

## Functional, Technical and Performance Requirements Capabilities

- Respondent will provide a response to this evaluation criteria by thoroughly completing the SAWS AMI Solution and Services - Functional and Technical Specifications workbook, Tab 1.0, Sections 1.2, 1.4 & 1.5; and Tabs 2.0 through 11.0.
- The SAWS AMI Solution and Services – Functional and Technical Specifications workbook is available for download on the SAWS project webpage for this RFCSP.

# Scoring Criteria

## AMI Price Proposal

- The AMI Price Proposal will consist of AMI Pricing Workbook, in Microsoft Excel, which is available for download on the SAWS project webpage for this RFCSP.
- The AMI Pricing Workbook includes multiple tabs which include fields that are locked for formulas, and fields clearly marked for entries to be made by the Respondent.
- SAWS intends for the AMI Price Proposal to be submitted in the same Excel Workbook format on the same USB drives containing the Original submittal.

# Meters

SAWS is contemplating four (4) metering options:

<b>Option 1</b>	Retrofit 100% of existing meter population with AMI communications modules.
<b>Option 2</b>	Retrofit existing meters installed after 2013 with AMI communications modules. Replace existing meters installed prior to 2014 with new mechanical meters + AMI communications modules. SAWS will independently procure any mechanical water meters it intends to deploy.
<b>Option 3</b>	Retrofit existing meters aged 2014 and newer with AMI communications modules. Replace existing meters installed prior to 2014 with new static meters + AMI communications module.
<b>Option 4</b>	Replace 100% of existing meter population with new static meters + AMI communications modules.

SAWS will select one option based on Offeror proposals.



# Automated Meter Infrastructure (AMI) Solution for the ConnectH2O Program

Fred Flores

Contract Administrator, SAWS

Marisol V. Robles

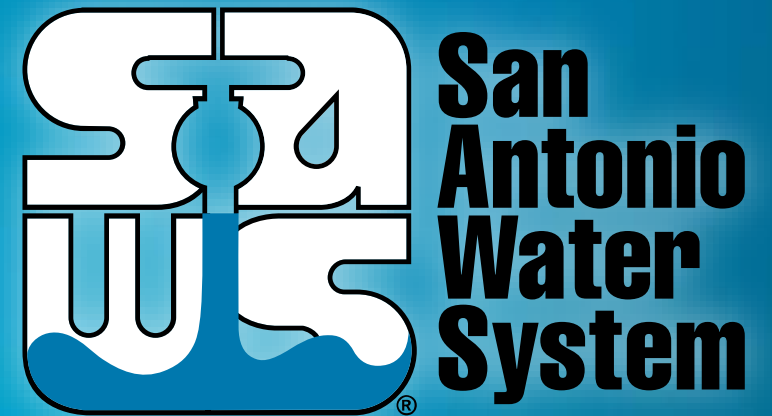
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