

End Point Installation (EPI) Services for the ConnectH2O Program

Janie Powell

Contract Administrator, SAWS

Marisol V. Robles

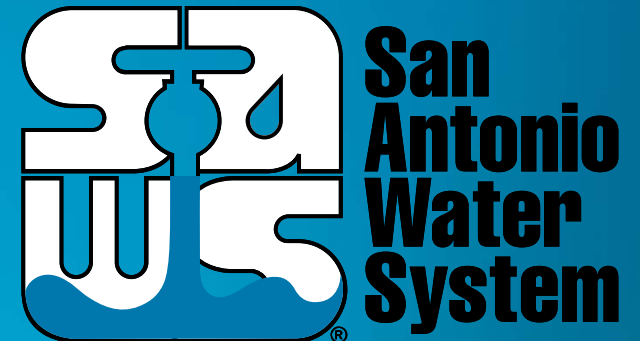
SMWVB Program Manager, SAWS

Jose De La Cruz

Director – Program Delivery, SAWS

Mark Michaels, PMP

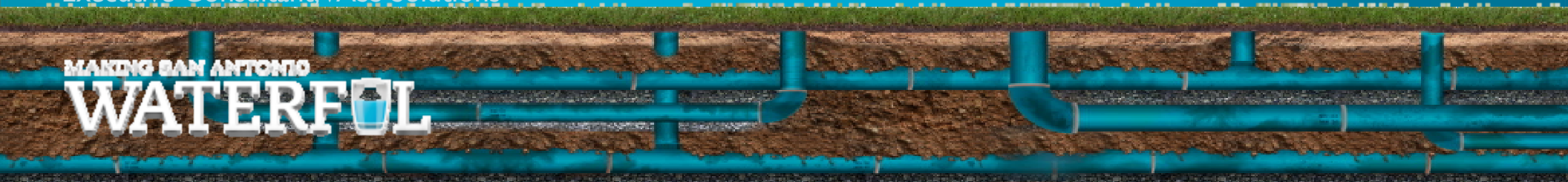
Executive Consultant, VASS Solutions



Pre-Submittal Conference

December 10, 2019

MAKING SAN ANTONIO
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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.

Project Objective

The San Antonio Water System (SAWS) is seeking qualified firms to provide the technology and services to implement Advanced Metering Solutions, Meter Data Management System, supporting infrastructure, and Endpoint Installation to automate SAWS' approximately 533,906 water meters, including future growth that will occur, across the greater San Antonio metropolitan area. Under the SAWS ConnectH2O Program, SAWS specifically seeks to:

- Through this RFCSP:
 - Procure & execute End Point Installation Services
- Through other RFSCPs issued concurrently:
 - Procure and implement an Advanced Metering Infrastructure (AMI) Solution;
 - Procure and implement a Meter Data Management System (MDMS); and
 - Procure new water meters and/or retrofit existing meters.

General Information

- Non-mandatory Pre-Proposal Conference
- Presentation information will be posted on SAWS website
- Request For Competitive Sealed Proposal (RFCSP) method
- Texas Water Development Board (TWDB) funded project
- Key project information:
 - 2096 estimated calendar days
 - Construction estimate is approximately \$25M - \$40M
 - Liquidated Damage in the amount of \$3,794.83 per calendar day and \$0.71 per month/per meter behind schedule
 - Appendix 7 – Disclaimer form required

Contract Requirements

Prevailing Wage Rate and Labor Standards – Section 2.10 of the General Conditions

- Contractors to utilize LCP Tracker
 - Certified payroll to be submitted on weekly basis
 - Contractors are responsible for sub-contractor payroll
 - Payroll records are subject to review
 - Late payrolls delay contractor payments from SAWS
- Wage decisions are included within the specifications
- Site visits are random and unannounced
- Interviews conducted will be private and confidential
- All apprenticeship programs will need to be approved by Department of Labor prior to starting

Contract Requirements *(cont.)*

Insurance Requirements –Section 5.7 of the General Conditions has been revised in the Supplemental Conditions

- Requirements for insurance include basic insurance with Professional modified to have a limit of \$5M per claim for Commercial General Liability and Professional Liability. Requires Cyber Risk at \$2M per claim and \$4M in the aggregate.
- Insurance certificate will be required prior to Board award to expedite execution of the contract.
- Insurance certificate must be compliant prior to executing the contract.

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
- Review the Sample Contract and all Exhibits.

RFCSP Schedule

2nd Set Questions Due

December 13
@ 2:00p.m.

Deadline to Submit Disclaimer

December 18
@ 4:00p.m.

Shortlisted Respondents Notified

February 2020

SAWS Board Approval

June 2020

Answers Posted by SAWS

December 18
@ 4:00p.m.

Proposals Due

January 22 @
2:00p.m.
Read Out-Loud
@ 2:30p.m.

Interviews with Respondents

(if necessary)
February 2020

Addenda

- Currently, three (3) Addenda are anticipated
- More than three (3) Addenda may be posted
- Check SAWS website often and prior to submitting proposal
- Known Addenda items are:
 - Responses to questions
 - 1st set of questions deadlines changed

Submitting a Response

- Submit hard copies
 - 1 original and 14 copies
- Include 2 USB flash drives of the original proposal; include all pages
 - All pages of the proposal
 - EPI Pricing Workbook in Excel
 - EPI Services Functional & Technical Specifications in Excel
 - Clout VTAQ Questionnaire
- Reference the RFCSP document checklist to determine what additional items are required
- Page limit of one hundred (100) per proposal*
 - No 3-ring binders
 - Use 8 ½ x 11 portrait format

*Does not include required forms or workbooks

Submitting a Response

Helpful Reminders

- Thoroughly read the RFCSP document prior to submitting 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
- Perform a thorough QA/QC on proposal prior to submitting

Submittal Deadline

- Submittal deadline is January 22, 2020 at 2:00 pm
- 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:
 - Walk-In - Deliver to Counter Services in the Customer Service department
 - Mail – Address to Contract Administration, Suite 171
 - SAWWS 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
- Proposal will be read aloud January 22, 2020 at 2:30 pm in room CR-C145

TWDB DBE Aspirational Fair Share Goal

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

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.

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

Page 1 of 2

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.

Instructions for Columns 1 - 4	1 - Full business name (line one) & point of contact (line two) 2 - Business address 3 - Telephone number 4 - Email address for the business
Instructions for Column 5	Enter one of the following procurement or contract categories: CONSTRUCTION – SUPPLIES – EQUIPMENT – SERVICES <i>For detailed definitions, review guidance document, TWDB-0210.</i>
Instructions for Column 6	Enter the type of business: MBE - Minority Business Enterprise, WBE - Women-owned Business Enterprise, or OTHER - 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 #	TWDB-0217	TWDB-0217 Revised 08/14/2018
TEXAS WATER DEVELOPMENT BOARD (TWDB) PRIME CONSULTANT/CONTRACTOR CERTIFICATION		
I. PROJECT INFORMATION		
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: _____		
II. GOOD FAITH EFFORT (Applicable to all subcontracts awarded by the prime contractor/consultant)		
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"/> EXCEPTION: 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
III. PROJECT PARTICIPATION ESTIMATES		
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.		
IV. TWDB APPROVAL SIGNATURE		
Signature indicates the form meets DBE Requirements.		
DBE Coordinator	Approval Date	

TWDB-0373

Page 1 of 2

FOR OFFICE USE ONLY
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

Column 1	Enter the full name, street address, city/state/zip for each firm awarded a contract for the project.
Column 2	Enter one of the following procurement or contract categories: CONSTRUCTION – SUPPLIES – EQUIPMENT – SERVICES
Column 3	Enter the type of business: MBE (Minority Business Enterprise), WBE (Women-owned Business Enterprise), or OTHER (NOTE: OTHER = Company or firm is Non-MBE or WBE)
Column 4	Enter the exact amount of the awarded contract.
Column 5	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. GFEP questions can be asked at any time before the submittal is due.

SMWVB Requirements

RFCSP Scoring:

–Up to 10 Points

- Outreach to DBE's through at least two (2) of the "Six Good Faith Efforts", as prescribed by TWDB – **3 Points**
- Consideration of Debundling Scopes of Work for DBE Participation, provided by Respondent on GFEP – **2 Points**
- Proposed DBE Participation on the Contract – **5 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



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

Telephone: 210-233-3420

Scoring Criteria

– Background, Experience and Past Performance	20 pts
– Project Approach, Team Experience	20 pts
– Functional, Technical and Performance Requirements Capabilities	20 pts
– EPI Pricing Workbook	30 pts
– DBE Outreach and Participation	10 pts
Total:	100 pts

Selection Process

- Technical Evaluation Committee (TEC) will review proposals to determine the Minimum Submission Requirements are met (Section C, of the Supplementary Instructions to Respondents).
 - If SAWWS 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 D, of the Supplementary Instructions to Respondents)
- The Selection Committee will review the ranking of the proposals and select 2 or more firms to be shortlisted.
- SAWWS will evaluate and score the EPI Pricing Workbook.
- Firms deemed most qualified by SAWWS based on the technical evaluation and compensation may be interviewed by the Selection Committee.

Scoring Criteria

Background, Experience and Past Performance

- This criteria is contained in Offeror's response to the Technical & Functional Specifications, Tab I.0, Section I.1, "General Offeror Qualifications – Background, Experience and Past Performance".
- Refer to EPI Services Functional & Technical Specifications workbook, which is available for download on the SAWS project webpage for this RFCSP.

Scoring Criteria

Project Approach, Team Experience

- This criteria is contained in Offeror's response to the Technical & Functional Specifications, Tab I.0, Section I.3, "General Offeror Qualifications – Project Understanding & Approach; Team Experience". Refer to EPI Services Functional & Technical Specifications.
- Refer to EPI Services Functional & Technical Specifications workbook, which is available for download on the SAWWS project webpage for this RFCSP.

Scoring Criteria

Functional, Technical and Performance Requirements Capabilities

- This criteria is contained in Offeror's response to the Technical & Functional Specifications, Tab 1.0, Sects 1.2 & 1.4; and Tabs 2.0 through 4.0. Refer to EPI Services Functional & Technical Specifications.
- Refer to EPI Services Functional & Technical Specifications workbook, which is available for download on the SAWS project webpage for this RFCSP.

Scoring Criteria

EPI Pricing Workbook (30 points)

- This criteria will consist of EPI Pricing Workbook, in Microsoft Excel, which is available for download on the SAWS project webpage for this RFCSP.
- The EPI 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 EPI Pricing Workbook to be submitted in the same Excel Workbook format (.xlsx).
 - The printed version of this workbook should be included within the first envelope/box
 - The electronic version of this workbook should be housed in the two (2) USB drives within the second envelope/box with the original proposal.

Scope

- Provide and operate a Work Order Management System (WOMS).
- Provide implementation and integration services.
- Provide logistics and installation services.
- Provide a single EPI Solution for the ConnectH2O Program which can support interoperability with the necessary SAWS Enterprise Solutions.

Minimum Submission Requirements

- Respondent must provide at least three (3) references from North America, with at least 1 from the last 18 months, including all relevant contact information, where Respondent has implemented or is currently implementing the requested End Point Installation (EPI) solutions and services for water meter and AMI module installations for utilities of at least 50,000 water metered customers. Respondent shall utilize the Minimum Required Experience tables provided in this RFCSP. Refer to EPI Services Functional & Technical Specifications, Tab 1.0 for this table.
- The Respondent shall have a detailed and documented Safety Management Program. Safety Management Program shall include at a minimum:
 - Total Recordable Incident Rate (TRIR) for each year [poor, average, good]
 - List any fatalities in the company's safety history of the prime Respondent's.
- The Respondent shall have an operational, software-based Work Order Management System (WOMS), inclusive of fully integrated handheld-based field tools, that can be readily integrated to SAWS' Information Systems to manage the meter installation and module installation process.
- The sensitive nature of the customer information contained in the data files requires Respondent to ensure that customer data remains private and secure. SAWS seeks evidence that the Respondent meets or intends to meet the spirit of the data and information technology and security requirements of section 3.0 of the Functional & Technical Requirements.
- The Respondent shall have a detailed and documented Quality Management and Quality Audit Program.

Communication Reminders

- No communication regarding the RFCSP with the following:
 - SAWS Project Manager
 - SAWS Technical Representatives
 - Any other SAWS staff, managers, directors or VPs
 - City Council member or staff
 - SAWS Board of Trustees
 - SAWS Consultant – VASS Solutions
- 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
- Register as a vendor with SAWS Vendor Registration and Notification

Respondent Questions

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

Janie Powell

Contract Administration Department

San Antonio Water System

Janie.Powell@saws.org

End Point Installation (EPI) Services for the ConnectH2O Program

Janie Powell

Contract Administrator, SAWS

Marisol V. Robles

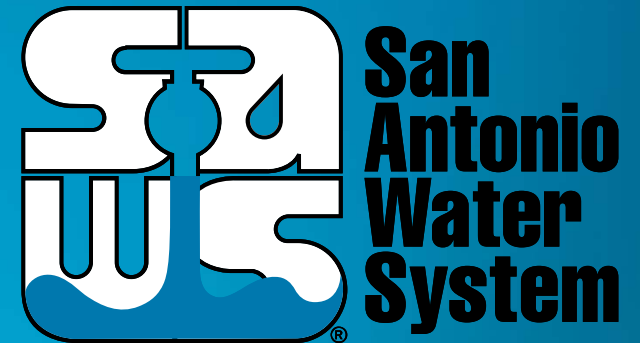
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Jose De La Cruz

Director – Program Delivery, SAWS

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