

Meter Endpoint Installation Services B-23-004 Package I & B-23-005 Package II RFCSP

Non-Mandatory Pre-Proposal Meeting
October 4, 2023 – 2:00 PM

Theadora Gonzalez

Contract Administrator, SAWS

Marty Martinez

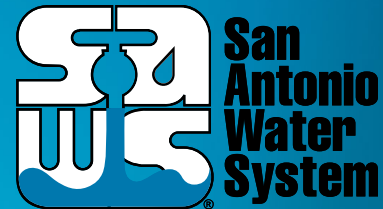
Senior Director, Field Operations, SAWS

David Sagistano

Manager | ConnectH2O Operations, AMI, SAWS

Dave Elve

Executive Consultant, VASS Solutions



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October 4, 2023

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WebEx Meeting Information

- Stay muted during the entire presentation
- Sign-In using the chat
 - Name, Company, Email Address
- Ask questions at any time during the presentation utilizing the chat. Questions will be addressed at the end of the presentation
 - Ensure to direct your questions to the entire group by selecting everyone from the drop down
 - An opportunity will also be provided after questions in the chat are addressed.
 - All formal responses to questions will be provided via an Addendum
- Audio only attendees may follow along on the presentation that has been posted to the SAWS solicitation website

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Oral Statements

Oral statements or discussion during the pre-proposal meeting today will not be binding, nor will it change or affect the terms or conditions within the Plans and Specifications of this Project. Changes, if any, will be addressed in writing only via an Addendum.

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Meeting Agenda

- Key Project Information
- Project Objective
- RFCSP Schedule
- Contract Requirements
- Evaluation Process
- Required Experience
- Proposal Packet Preparation
- Scoring Criteria
- Submitting a Response
- Submission Due Dates
- Additional Reminders
- Communication Reminders
- Solicitation Questions
- RFCSP Overview
- Field Conditions
- Questions

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Key Project Information

- This is a Non-Mandatory Pre-Proposal Meeting
- Procured under Chapter 2269 of Texas Government Code as a Request for Competitive Sealed Proposals (RFCSP)
- Estimated budget for each package is \$12,500,00.00 - \$25,000,000.00
- SAWS anticipates awarding the contracts for an initial period of one year with optional 2 one-year extensions.
- SAWS will award within 90 days from the proposal opening date

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Project Objective

- Removal and installation of up to 160,000 water meters in various sizes, installation of Endpoints, and associated field work in connection with the deployment of SAWS ConnectH2O Program.

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RFCSP Schedule

Milestone	Date & Time
Questions Due	October 6, 2023 by 4:00 PM (CST)
Addendum Posted	October 9, 2023 by 4:00 PM (CST)
Proposal Due- B-23-004-TG, Package I	October 18, 2023 by 10:00 AM (CST)
Proposal Due- B-23-005-TG, Package II	October 18, 2023 by 2:00 PM (CST)
Proposal Evaluation	October 20-27, 2023
Interview Notification Issued	November 1, 2023
Interviews, if necessary	November 13 & November 14, 2023
Recommended Firm Notified	November 14, 2023
Negotiations	November 15-28, 2023
Contract Preparation	November 29-30, 2023
Board Award	December 2023

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Contract Requirements

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

- Wage decisions are included within the specifications
- Contractors shall utilize LCP Tracker
- Certified payroll to be submitted on weekly basis beginning on the start date of the Notice to Proceed, including weeks in which work is not performed
- Be aware of all SAWS Holidays, recent changes to Wage Checklist
- Contractors are responsible for sub-contractor payroll
- Late payrolls delay contractor payments, as well as release of retainage at the end of the project
- Payroll records are subject to review
- Site visits are random and unannounced
- Interviews will be conducted and will be private & confidential
- All apprenticeship programs will need to be approved by Department of Labor prior to starting

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Contract Requirements (cont.)

Insurance Requirements –Section 5.7 of the General Conditions

- Commercial Liability to include Worker's Compensation, Employer's Liability and Auto Liability
 - Property Insurance
 - Pollution Liability
 - Installation Floater
- Contractor's insurance must be compliant with all other contracts
- SAWS will request insurance certificate prior to Board award to ensure insurance compliance and to assist in expediting execution of the contract
- Contractor must maintain insurance compliance during the entire term of the contract.
- Failure to do so, including not provided renewal certificates of insurance creating a lapse in coverage, may result in the Contractor being removed from the project site until the issue is resolved

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Contract Requirements (cont.)

Payment and Performance Bonds

- *In order to accommodate obtaining a Performance Bond and a Payment Bond to support the entire Contract Time (as defined in the Contract Documents), the San Antonio Water System anticipates that the initial period for the Contract Time shall be one (1) year (the “Initial Term”) but reserves the right to extend the Contract Time by up to two (2) additional one (1) year terms (the “Optional Renewal Terms”), subject to the same terms and conditions as enumerated in the Request for Competitive Sealed Proposal and Instructions to Respondents at a price or prices not to exceed the prices quoted in Exhibit A (EPI Pricing Workbook).*
- Respondents should ensure to review all Supplemental and Special Conditions

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Evaluation Process

- Technical Evaluation Committee (TEC) will score the proposals based on the evaluation criteria published in the Supplementary Instructions to Respondents (SIR) to determine the Respondent who can provide the best value to SAWS
- Price will be calculated (lowest price receives the most points) (Exhibit A- MEI Pricing Workbook)
- Selection Evaluation Committee reviews final scores and recommends firm
- Negotiations, if any
- Board award

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Required Experience

Supplemental Instructions to Respondents (SIR-2)

- Respondent shall provide at least three (3) references in the past ten (10) years from North America where Respondent has implemented or is currently implementing the requested Meter Endpoint Installation (MEI) solutions and services for water Meter installations and/or AMI communication module installations for utilities of at least 50,000 water Meter customers.
- In order to be awarded both RFCSP I and II, the Respondent shall demonstrate that it has provided these services for a utility with at least 100,000 water endpoint installations or exchanges.
- Respondent's proposal must illustrate this experience in order for SAWS to deem the Respondent to be responsive and for Respondent's proposal to advance to the Selection process.

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Proposal Packet Preparation

- Electronic Proposals ONLY
- Review Project Scope, Instructions to Respondents, and Supplementary Instructions to Respondents
- Reference the Proposal Response Checklist
- Utilize Evaluation Criteria forms to ensure all items are included
 - 2 files required for electronic submittal
 - Follow file naming convention

RESPONDENT'S PROPOSAL CHECKLIST	
Project Name: <u>Meter and Endpoint Installation Package I</u>	
SAWS Solicitation Number: <u>B-23-004-TG</u>	
FILE 1	
Titled: PROPOSAL_B-23-004-TG_FIRM NAME	
<input type="checkbox"/>	Exhibit A – MEI Pricing Workbook in native Excel format
<input type="checkbox"/>	Signed Proposal Certification
<input type="checkbox"/>	Page (PC-1) Bid Bond*
<input type="checkbox"/>	Financial Statement
<input type="checkbox"/>	Cashier's Check or Certified Check*
*If proposal is submitted electronically without Bid Bond, SAWS will require check within 24 hour of bid opening	
FILE 2	
Titled: ORIGINAL PROPOSAL_B-23-004-TG_FIRM NAME	
<input type="checkbox"/>	Proposal Checklist
<input type="checkbox"/>	Statement on President's Executive Orders –
<input type="checkbox"/>	Page IR - 8
<input type="checkbox"/>	Conflict of Interest
<input type="checkbox"/>	Questionnaire – Form CIQ W-9
<input type="checkbox"/>	Proof of Insurability (Letter from Insurer or Sample Certificate of Insurance) Respondent Questionnaire
<input type="checkbox"/>	Evaluation Criteria as outlined in Section E of the SUPPLEMENTARY INSTRUCTIONS TO RESPONDENTS <ul style="list-style-type: none"> <input type="checkbox"/> Background Experience and Past Performance <input type="checkbox"/> Compliance with Contract Terms and Project Requirements <input type="checkbox"/> Project Approach – including Exhibit E – Installation and Resource Plan in native Excel format

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Proposal Packet Preparation (cont.)

- A Bid Bond is required with the submission of Respondent's Proposal
- Review Instructions to Respondents and Supplementary Instructions to Respondents thoroughly
- References and contact information must be valid
 - Confirm phone numbers and email addresses prior to submitting a proposal
 - Project references must be project owners, not consultants, or other contractors
 - If valid contact information is not provided for the Utility/Owner, the project may not be considered and the Respondent's score for this criterion may be reduced, and/or the Respondent's proposal may be deemed non-responsive.
- Ensure all requested information per the Respondent Checklist and all required documents are submitted and signed (e.g., Respondent Questionnaire, CIQ, etc.)
- MEI Pricing Workbook, Exhibit A

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Proposal Packet Preparation (cont.)

- Addendums are acknowledged on the Price Proposal Signature Page
 - Check the SAWS website regularly for addendum postings
 - It is possible to have multiple addendums
- Respondent's Proposals submitted for this RFCSP should clearly demonstrate, completely and sufficiently that:
 - They have the Required Experience
 - Project Team experience and qualifications (Org chart with roles and responsibilities of proposed team)
- Thoroughly review evaluation criteria and respond with all required information to maximize points
 - Detailed, thorough responses are recommended
 - Avoid “boilerplate” responses
 - Respondents should ensure all required items are included



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Scoring Criteria

Criteria	Weight	Pg. No.
Background, Experience and Past Performance	31 points	SIR-3
Compliance with Contract Terms and Project Requirements	17 points	SIR-5
Project Approach	15 points	SIR-5
Price Proposal	37 points	SIR-6
TOTAL	100 points	



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Scoring Criteria

Background, Experience and Past Performance (31 pts)

- The Offeror shall provide three (3) references in the past five (5) years from North America where Offeror has implemented or is currently implementing the requested End Point Installation (EPI) solutions and services for water meter installations and AMI communication module installations for utilities of at least 50,000 water metered customers, each. For each reference, provide the following information:
 - Client Name.
 - Client location (city & state).
 - Number of metered water connections.
 - Number of static water meters installed.
 - Type, manufacturer, and brand of static water meters installed.
 - Number of mechanical/positive displacement water meters installed.
 - Type, manufacturer and brand of mechanical/positive displacement water meter installed.
 - Number of AMI communications modules installed.
 - Name and model number of AMI communications module installed.
 - Start date and duration of project.
 - Offeror's role in project.
 - Valid point of client contact (name, phone number & e-mail address.)

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Scoring Criteria

Background, Experience and Past Performance (cont)

- Narrative for key issues and ideas in a comprehensive overview of services being offered by the Respondent
- Organizational Chart of owners and any direct or indirect subsidiaries of the contracting party with percentage of ownership
- The Offeror shall list all affiliates of the contracting entity including subsidiaries, parent company, and all other subsidiaries of the parent company.
- Audited financial statement for most recently completed fiscal year and most recent quarterly financial statement.
 - Will need and audited financial statement subcontractor also if over 25% of the work will be performed by a subcontractor
- Company's relevant assets (in dollar value) as they relate to the scope of this RFCSP.
- The Offeror shall list all major investments in the last two (2) years relative to asset acquisition, capital infrastructure upgrades, etc., as it relates to the scope of this RFCSP.
- Most current financial ratings from Moody's, S&P, Dun & Bradstreet, or other such rating agencies.
- The Offeror shall describe how it anticipates meeting the financial obligations and resource requirements of this project, including access to short-term unsecured indebtedness.

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Scoring Criteria

Compliance with Contract Terms and Project Requirements (17 pts)

- This criteria will be evaluated based on Respondent's proposed redlines as requested within #12 of the Respondent Questionnaire.
- This is Respondent's sole opportunity to propose redlines to provisions in these documents, and changes will not be considered concerning any other provisions in these documents, after the proposals are submitted.
- For the avoidance of doubt, a 'provision' is a distinct section (separated by a heading) within a document (e.g., "Indemnification" in the Supplemental Conditions).

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Scoring Criteria

Project Approach (15 pts)

- **Installation and Resources Schedule.**
 - As part of the proposal offeror must submit Installation and Resources Schedule- **Exhibit E.**
- **Quality and Audit Program**
 - Shall submit a copy of Offeror's minimum Quality and Audit Program that Offeror intends to apply for SAWS.
 - As part of Offeror's proposal, illustrate additional quality and audit metrics and recommendations that Offeror proposes to assure how Offeror will achieve the highest level of quality and minimum errors to SAWS and its customers.

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Scoring Criteria

Project Approach

- **Safety Management Program**

- Offeror shall provide a copy of the Safety Management Program that Offeror intends to incorporate for the execution of the End Point Installation Services.
- As part of Offeror’s proposal, Offeror shall provide a copy of the Safety Management Program that Offeror intends to incorporate for the execution of the End Point Installation Services.
- Offeror shall provide the following information in the matrix format provided below.
 - Total Recordable Incident Rate (TRIR) information for each year [poor, average, good] for calendar years 2018 to 2022, plus current 2023 statistics, including backup documentation.
 - Experience Modification Rate (EMR) for the past three (3) years, including backup documentation.
 - List any fatalities in the company's safety history of the prime Offeror.

- **Training Manual.** As part of Offeror’s proposal, provide a copy of Offeror’s Training Manual for the services proposed.

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Scoring Criteria

Price Proposal (37 pts)

- The Proposal with the lowest total price will receive thirty-seven (37) points. Proposals will receive a percentage of thirty-seven (37) points based on a comparison with the lowest total price proposal as described below. A pricing workbook has been provided as Appendix A.
- Computation Steps:
 - i. Step 1. Determine lowest total price and award 37 points for price.
 - ii. Step 2. Calculate the ratio between the lowest total price and each proposal. Multiply the ratio by 37 to obtain the points earned. Here is an example calculation:

Proposal	Price	Calculation	Points Earned
A	\$22,995,000	$(12,875,000 / 22,995,000) \times 37$	20.72
B	\$19,875,000	$(12,875,000 / 19,875,000) \times 37$	23.96
C	\$16,625,000	$(12,875,000 / 16,625,000) \times 37$	28.65
D	\$12,875,000	$(12,875,000 / 12,875,000) \times 37$	37.00
E	\$15,250,000	$(12,875,000 / 15,250,000) \times 37$	33.77

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Submission Due Date

B-23-004- PACKAGE I

- **Electronic Proposals Only**
- Follow specific electronic proposal delivery instructions:
 - **B-23-004 PACKAGE I** : Request the FTP Site for Upload no later than **10:00 AM CDT October 17, 2023**
 - A Webex Proposal opening for **B-23-004-PACKAGE I** will occur at **10:00 AM CDT October 18, 2023**
 - Submit FTP Requests by above due dates. Late responses will not be accepted and will not be opened

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Submission Due Date

B-23-005 PACKAGE II

- **Electronic Proposals Only**
- Follow specific electronic proposal delivery instructions:
 - **B-23-005 PACKAGE II** : Request the FTP Site for Upload no later **than 2:00 PM CDT October 17, 2023**
 - A Webex Proposal opening for **B-23-005-PACKAGE II** will occur at **2:00 PM CDT October 18, 2023**
 - Submit FTP Requests by above due dates. Late responses will not be accepted and will not be opened

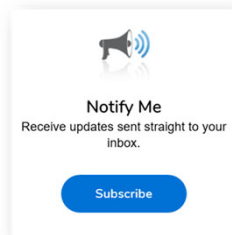
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Additional Reminders

- Register with Vendor Registration Program on the SAWS website at www.saws.org to ensure access to the latest information.
- To receive updates on specific projects, registered vendors should subscribe to the project by selecting the project, and clicking 'Subscribe' under the Notify Me box



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Communication Restrictions

- There shall not be any communication with the following during the Proposal period:
 - ✓ Design Engineer
 - ✓ Developer
 - ✓ SAWS Project Manager or Project Engineer
 - ✓ Any other SAWS staff
 - ✓ City Council member or staff
 - ✓ SAWS Board of Trustees
- This includes phone calls, emails, letters, or any direct or indirect discussion of the Proposal

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Solicitation Questions

- Questions must be submitted in writing via e-mail or fax no later than October 6, 2023 by 4:00 PM
- Addendum will be posted to the solicitation page on October 9, 2023 by 4:00 PM
- Send all questions to:

Theadora Gonzalez
Contract Administration Department
San Antonio Water System
Theadora.Gonzalez@saws.org
(210) 233-3385

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RFCSP Overview

Marty Martinez
Senior Director, Field Operations

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RFCSPs Overview

- RFCSP Package I and Package II (004 and 005) are identical
- Vendors are encouraged to bid both RFCSPs if minimum requirements are met
- Based on a December Board award, please state the timing in your response on when your firm can have personnel on the ground at SAWS

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Guidance

- Vendors have one opportunity to **Red line** proposal
- A “solid reference” for the MEI RFSCSP
 - Utility Name
 - Scope: Water Meter and AMI Endpoint installations
 - At least 50,000 Water Meters and/or Endpoints installed
 - Contact Person (available to provide feedback)
 - Email, phone
 - Projects completed within the last 5 years

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Warehousing and Office Space

- SAWS Mission Road facility
 - Liability waivers will be required
 - Personal vehicles parking
 - Company vehicles
 - 24/7 Security on-site
 - Office space for Vendor 2 employees
 - Facility badging requirements
- Conex boxes (storage units) for Vendor daily inventory
- Materials pick-up and return process

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Mission Road Facility Overview



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Work Management Application (WMA)

- WMA supplied by SAWS
 - SAWS issued RFP ongoing for WMA
- Field devices supplied by Vendor
- SAWS will have its own crews doing similar work in different cycles using the same WMA
- SAWS to confirm with Vendor regarding standard installation and nonstandard site work workflows

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Safety and Training

Safety

- Safety is the number one priority for SAWS
- Vendors to have refined safety programs to be approved and regularly audited by SAWS
- Safety audits done by SAWS

Training

- Vendors to bring own training programs to be approved and monitored by SAWS

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Workflow Discussion

- SAWS will perform pre-inspections and box cleaning. Final cleaning before installation required by Vendor
- Extra work discussion and expectations
 - Replace curb stop valves, install/replace yokes, re-set/re-level/install meter boxes, install meter connections/flanges

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Route Assignments

- Customer communications schedule and process
- Blackout periods
- SAWS to assign routes

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Field Conditions

David Sagistano
Manager, ConnectH2O Operations, AMI

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Pit Box & Lid Types



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Pit Settings



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Terrain- Types



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Additional work – Direct Connect & Install meter connection



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Additional work – Pit Boxes



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Additional Work – Curb Stop Replacement



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Additional Work – Yoke's (re-setters)



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Ideal AMI Meter Installations



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Ideal AMI Meter Installations (cont.)



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QUESTIONS?

Reminder: Oral statements or discussion during the pre-bid meeting today will not be binding, nor will it change or affect the terms or conditions within the Plans and Specifications of this Project. Changes, if any, will be addressed in writing only via an Addendum.

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Meter Endpoint Installation Services B-23-004 Package I & B-23-005 Package II RFCSP

Non-Mandatory Pre-Proposal Meeting

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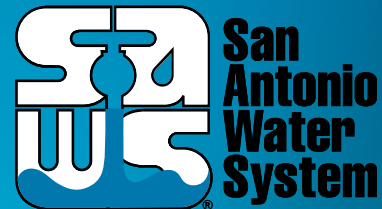
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